Considerations and Guidelines

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This article is part of the assessment builder guide. You will require administration access to view the pages mentioned in this article.

The following are general recommendations to consider when creating custom assessments:

Assessments Considerations

All assessments need to be considered in regards to:

- layout for data entry.

- layout on screen when retrieved.

- layout when printed.

Abbreviations should be limited to only those in common use, if there is any doubt then abbreviations should not be used.

- When asking for dates as part of the assessment consider providing an estimated flag or selecting a year only.

  Examples include operations, dates of treatments, dates commenced medications.

- The display of numbers should be consistent.

- Temperature, BSL to one decimal point i.e. 37.1

- Pulse, BP, Peak Flow, to a whole number i.e. 88, 120/80

- Others i.e. number of children, number of admissions to be a whole number i.e. 2

General Assessments Guidelines:

- Clear response areas

- Use of colour/grey scaling

- Linear completion

- Clear purpose for the assessment

- Clear who should complete the assessment i.e. RN, Doctor.

- Any prerequisites clear upfront i.e. to complete the form you need X

- Are there adequate instructions is it clear were to get help

- Sufficient space for written responses

- Does the assessment check logic of responses

- Are unnecessary questions skipped based on answers

- Is the user prompted to enter required data

- Is data entered into expanded fields displayed in the print out.

- Option to save and continue later

- On long assessments is it clear where the user is up to and how many questions are left

- Are their appropriate section headings

- Can users provide feedback on the assessment

- Is a privacy statement required

- Are alternative browsers supported

- Can the assessment be used by users without a mouse (+/- requirement)

- Assessment title reveals the purpose

- Avoids the use of obscure terms or acronyms

- Contextual information related to the question if needed.

- If the assessment is long or multi use should it be made into separate forms.

- Simple everyday language

- Are there few words per sentence

- Does the form use words that mirror the users language

- Most questions have pick lists of answers

- The assessment completes calculations if required

- The assessment is self instructing

- Elements like question and answer boxes are placed consistently

- Avoids small print, decorative fonts, italics, extensive capitalisation of text, long line lengths, close line spacing or poor colour/shading contrast

- Follows left to right and top to bottom sequence

- Are the common questions up front and those that only relate to some further down the form

- Does the form display for those with visual impairments/large print

- Has there been client feedback

- Does the assessment address operational as well as policy requirements

The assessment should NOT:

- Have lots of options

- Ask to recall information from the distant past

"Show if" warnings or other instructional text

A consistent approach to user prompts or warnings is required. All warnings should be a static text element but text not bold.

Select lists

- The Select list element creates drop down lists.

- All select lists should have a blank first item so there is NOT a default selection when the assessment is created.

Assessments with calculations

All questions that result in a calculation should be mandatory.

Layout

Assessment elements are contained in Groups which provide a boxed outline similar to a text box in Word.

- Each form should have minimum of one group

- Use a group where a section or group of questions is defined on a paper form

- Each group has a Title

Text

Forms have a consistent default text in both edit and view mode – it is recommended not to use HTML to change this.

Text fields

Use where only limited text required

- Small – default entry

- Medium – 100 (characters)

- Large – 180 (no wider)

Text areas

- Standard width – No wider than 150 columns

- Standard depth

- Average text area – Default of no entry is suitable

- Large text area – 5 rows

- Extra large – 10 rows.

Note: Text area's wrap text and add scroll bars in edit mode and display all entered text in View mode.

Reference

Australian National Audit Office (2006), User Friendly Forms Key principles and practices to effectively design and communicate Australian Government forms. Department of Innovation, Industry, Science and Research (2007), Form Design Standards

Browser Version

Due to minor differences in display between Microsoft Edge, Chrome and Mozilla Firefox – forms created should be TESTED in the browser that will be used.