



# **ELMER**

**User Interface Guidelines for Governmental Forms on the Internet** 

Version 2.1

This is a minor revision of ELMER 2, adopted 23 August 2011.

### **Preface**

From day one, the basis for work on the ELMER guidelines has been that the transition to electronic forms is potentially an important simplification measure for users of public services, provided that the online forms are experienced as more user-friendly than the old paper forms. By adhering to good pedagogical principles, electronic forms may also ensure a better understanding of the tasks as well as improved verification of data before submission. This will in turn improve the quality of submitted information and allow for more efficient case processing by the authorities.

From 2009 until the present day, ELMER 2.1 has been developed through collaboration between very competent enterprises and professionals. As with the previous version, public authorities and usability experts have played an active part. Together, they have contributed unique experience of *developing* widely different online forms, of *receiving and using* information from those same forms and of *user testing* among widely different target groups.

A number of bodies and experts have written, read and commented on input and proposed changes via the open Internet discussion forum. Four one-day meetings have been held, attended by representatives of a wide range of environments, at different stages of the process. After each gathering, change proposals have been discussed using the discussion forum and separate dispatches. The Brønnøysund Register Centre has also had meetings with many individual agencies and professional environments, including with regard to universal design. Various suppliers of form tools have provided valuable input, in separate meetings and through the open discussions. Students at Gjøvik University College have also contributed, providing sketches, criticism and ideas for updating ELMER.

Regardless of legal requirements and government instructions, support for standardisation is dependent on acceptance and respect in relevant professional and decision-making environments. A discussion was initiated in autumn 2010 as to whether ELMER should be a mandatory standard, not only for business forms, but also for forms used by private individuals. This aroused the interest of a whole new group of experts and agency representatives. We chose to postpone what was almost a complete publication in order to discuss the matter further with the new stakeholders. This delayed ELMER 2.1 by more than six months, but it also gave birth to new reflections, important improvements and a more uniform understanding of the guidelines.

Electronic solutions are becoming increasingly important as strategic and economic tools in the public sector. 'Digital as first choice' is now a governing principle in this country, and eGovernment is a target area both in Europe and in the rest of the world. We feel proud that the leading nations in this area have referred to and been inspired by ELMER in recent years.

All requirements from ELMER 2 have been thoroughly assessed. Only 31 of the original 105 requirement items have survived the process unchanged. Based on input from Norwegian and international environments, the requirements in several areas are less rigid than in the previous version, adapted to new technical possibilities and new Internet user patterns. But most of the changes consist of a clarification of requirements that had already been formulated in ELMER 2, among other things through the use of more accurate terminology.

One basic premise has been to ensure recognition over time while taking account of the effort that was put into developing solutions for ELMER 2. Despite the increased use of smartphones and tablets, the present version of ELMER continues to focus on forms to be presented in a web browser on a larger screen. Our experience so far is that very few people choose to fill in complex, government forms on small hand-held units. It was not natural, therefore, to take particular account of this form of use within ELMER's area of application in this limited revision of the guidelines, though it may be a topic for ELMER 3.

I would like to thank everyone who has contributed and wish you good luck with ELMER 2.1. Guiding material and courses can be found at <a href="https://www.brreg.no/elmer">www.brreg.no/elmer</a>, and we are happy to answer any questions you may have and to receive your comments at elmer@brreg.no.

23 August 2011

Erik Fossum Director General The Brønnøysund Register Centre

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# Introduction to the ELMER Guidelines

### Scope

The objective of the ELMER Guidelines is to meet the challenges of Internet design and pedagogics that are particular to web forms. There are a number of standards and recommendations which impact user experience in web based communication in general. WCAG requirements (WAI) and W3C conventions have not been baked into the ELMER Guidelines, but ELMER shall not contain recommendations which are incompatible with these. Neither is the obligation of using both official variants of Norwegian, bokmål and nynorsk handled here, since it applies to written communication in general, and by that also to forms.

In other words, ELMER is not *the only* set of guidelines to consider, when designing electronic forms, but the only one that *concentrate* on the form itself.

It is an important principle that the public authorities shall only ask for information

- which they have a statutory right to require,
- which is relevant to the case processing in question,
- which they cannot receive from other sources and
- which the declarant can be expected to have, or be able to obtain, access to.

This restriction follows partly from the law itself, and partly from political signals. ELMER does not comment on *which* information the authorities should request, only on *how* the questions are presented in the context of an internet form.

Furthermore, principles related to login and search functionality, executive processing and filing procedures, except for those that have been incorporated into the form itself, are not dealt with in these guidelines. Nevertheless, it has been necessary to include borderline functions which lie in-between the form and surrounding systems in cases where these systems greatly influence the user experience when filling in the form.

ELMER consists of guidelines for designing *forms*. The list of terms and illustrations must be deemed to be a part of the guidelines and ELMER's definition of <u>form</u> is thus governing for the type of web elements the guidelines aim to influence the design of. Official requirements to *comply* with the guidelines can nevertheless apply to more precisely defined areas than those that follow from the form definition.

ELMER is based on recognised principles developed through extensive experience and testing, both in Norway and abroad. However, within the framework of ELMER, design of the individual *solution* and the individual *form* for the individual *user groups* is decisive for the user experience. This means that user testing and involvement is important in order to meet the many ELMER requirements that are based on the best possible adaptation to the user's needs.

### **How to Apply the Guidelines**

ELMER 2 shall concretise user quality requirements in web forms

- vis-à-vis collectors (organisations/agencies that shall receive the replies submitted in the form) from users and political environments
- vis-à-vis suppliers from their contracting collector and
- vis-à-vis experts in the collector's organisation from the management of the organisation/agency

When referring to ELMER 2 in requirement specifications, it is important to be aware of the specific division of labour and responsibility between the collectors and their suppliers. Since it is the collector who is responsible for the communication with the respondents, the collector will be the one to decide and to be responsible for questions, labels, help texts, validation rules, error messages etc. As a rule, the supplier's influence here is usually quite limited.

A requirement to external suppliers stating that their **system/solution** shall comply with ELMER 2 would mean that:

• a **framework** shall be supplied which will enable the collector to adjust content and information structure of the form as described in ELMER.

In cases where external suppliers shall provide **both content and information structure** for the form itself, it would mean that

• a **proposal** relating to content and information structure shall be provided that complies with ELMER.

A requirement for suppliers to comply with the ELMER 2 guidelines must also address the extent to which the "should requirements" must be met in the delivery. ELMER 2 differentiates distinctly between "must", "should" and "may". "**Must**" constitutes a mandatory requirement which shall be met. "**Should**" is a recommendation, but it is up to the individual to weigh these requirements up against other considerations, such as cost-benefit analyses, or suitability in relation to other user needs. "**May**" is mainly used to emphasise that a solution is permitted.

In the clarifications developed for each point, there are some suggestions in relation to text and design. "**Suggestions**" shall be interpreted as being more binding than an example, but less binding than a recommendation.

### Structure of the document

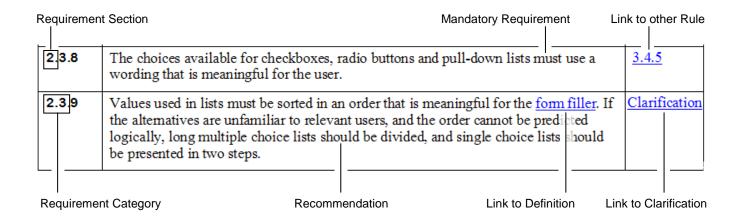
The requirements are presented in varying number of *categories* within five main *sections*. Thus each requirement has a three digit identification number. Permitted alternatives to a requirement are identified with litra a, b, c etc. in addition. Thus, requirement 1.1.4a is a permitted alternative to requirement 1.1.4.

A checklist for design of an ELMER form is also included, as well as a separate chapter on concept definitions.

Each requirement may be supplemented with three different types of references:

- Explanations or clarifications of a rule, such as suggestions for standardised texts in forms.
- Reference to other, related rules
- Explanatory Examples

Clarifications and examples are presented in a separate chapter, divided according to requirement category.



The references are clickable in the electronic version. So are the definitions defined in the term overview (except when they occur several times in succession).

### Changes from the previous version

ELMER defines detailed requirements that are intended to ensure that online forms are user friendly. Who is required to comply with ELMER is a matter for political decision. Relevant decisions on the date of publication concern the requirement to comply with version 2.0.

It has therefore been a goal in the work on ELMER 2.1 to avoid *coming into conflict with* ELMER 2.0 by developing solutions and forms in line with the new version. Emphasis has also been placed on retaining the numbering which is linked to the previous version. Items that have been removed are therefore presented with the text '**Removed**' in the new document and new requirements are numbered after the highest number in the previous version. New requirements are thus described at the end of the individual requirement group, not necessarily together with the most similar requirements.

The previous version will still be available at <a href="www.brreg.no/english/elmer">www.brreg.no/english/elmer</a>.

# 1: Components of the form page

### 1.1: The Navigation Area

A separate navigation menu shall help the form filler to keep informed about the main topics of the form, show where he is, and enable him to move between the different form pages. Carefully considered and standardised use of navigation elements shall ensure easy recognition between forms from different collectors.

No	Requirement	Reference
1.1.1	All <u>form pages</u> except the <u>table page</u> must contain a navigation area to the left of the <u>input area</u> .	Example 1
1.1.2	The <u>navigation area</u> must contain a page overview with a title for each of the form pages. For forms containing <u>track</u> options, all pages which at any time are clearly to be filled in by the relevant form filler, shall be shown until a track has been selected.	2.1.1 1.1.4.a
1.1.2a	In forms where it would be unnatural to divide the content over several form pages, the form title can be left our in the navigation area. This will apply when  1) the form consists of only a few questions, and 2) the questions are clearly related to a single topic.	
1.1.3	The page titles in the navigation area must provide an easy-to-understand description of the topic(s) on the <u>form page</u> , using as few words as possible. The most important information in the title should be presented first in the text. All page titles within a form must be different from one another.	2.3.1
	In cases where it is natural to differentiate between different menu options by using easy-to-understand names, numerical codes (item numbers etc.) must be avoided or be placed last.	
1.1.4	Each individual page title must be linked to a form page, and allow the <u>form filler</u> to choose the order in which he or she would like to complete, or read, the relevant pages. The representation of the active page must be highlighted.	Example 1
1.1.4.a	In forms where:  1) the order is significant with regard to interpretation and response quality, or 2) the order will depend on responses given on previous pages,	<u>4.3.1.a</u>
	the page order must be locked by ensuring that the <u>page overview</u> is not clickable.	
	If the page order is locked and the page title itself can give an unwanted warning concerning subsequent form content, the page name can also be left out of the navigation menu until the individual page is to be presented.	
1.1.5	The <u>standardised text</u> in the navigation area above the first page title must indicate whether the completion order can be random or is locked.	Clarification
	This should also be visually indicated.	
1.1.6	In forms with many <u>form pages</u> (normally more than 7 - 8 pages), titles for different groups of pages (group titles) should be added above the titles of the individual pages, or as a higher level in an expanding menu. Collective terms used for the subordinate pages must be easy to understand for the relevant user group. The group titles must be highlighted.	Example 2

### 1.2: The Information Area

A separate area must be set aside for providing the form filler with optional additional information and messages relating to completion-related errors or ambiguities. User-activated help makes it possible to provide new, desired knowledge to unskilled users without having to overburden the professional user with unwanted information. Carefully considered and standardised use of information elements shall ensure recognition and familiarity between forms issued by different collectors.

No.	Requirement	Reference
1.2.1	All <u>form pages</u> with the exception of the <u>table page</u> , must contain an information area to the right of the <u>input area</u> .	Example 1
	The content of this area must be placed close to the input area and not stand out visually from this area, for example, by vertical lines or strongly diverging colours.	
1.2.2	In the information area, the form filler will be presented with <u>user-activated help</u> and feedback on how to correct errors ( <u>error messages</u> and <u>warnings</u> ). The text must be presented in its entirety, i.e. not as a tool tip, hint or in another way which requires specific positioning of the mouse pointer.	Example 1
1.2.3	<u>User-activated help</u> must <i>appear</i> when the form filler clicks on a standardised help symbol in connection with a question, a question group or a form page. The form filler can click again on the same symbol to make the help text <i>disappear</i> from the screen, and the text must be <i>replaced</i> by a different text if the form filler clicks on the symbol to get help with another question.	3.1.5 3.4.1 4.2.1
1.2.4	<u>Error messages</u> and <u>warnings</u> must appear in the information area unprompted following continuous validation and when the form filler clicks the pertaining field on a separate <u>validation page</u> after <u>final validation</u> .	<u>4.3.1</u> <u>4.3.2</u>
1.2.5	Help texts or error messages must be visible on the <u>screen</u> at the same time as the current <u>input field</u> . The connection between the field and pertaining information should be clearly visible.	Example 1 Example 8 4.2.4 4.3.4
1.2.6	If <u>user-activated help</u> is retrieved for a field for which an <u>error message</u> has already been returned, the help text should not replace the error message, but be placed directly above or below it.	

### 1.3: Other fixed elements

In the world of paper, the actual "conversation" between the collector and the form filler is supported by guidance material and a support apparatus. These functions must also be safeguarded in the electronic forms, above and beyond the use of help texts, and in a way that is easily recognisable from form to form. Also navigation between different form pages, saving, validation and the actual submission process must have a common, well thought through methodology.

No.	Requirements	Reference
1.3.1	The <u>labels</u> , <u>input fields</u> , <u>help symbols</u> and <u>inline help</u> used in the form must be presented in a separate input area between the navigation area and the information area.	Example 1
1.3.2	At the top right-hand corner of every <u>form page</u> , there must be a link named 'Help'. This link must open a separate information page (Help overview) with access to relevant information about the following topics:	1.3.6 4.2.7
	<ul> <li>About completion and use         Brief information stating that a help symbol next to the input fields provides a more detailed explanation, that the system stores data continuously, and that nothing is submitted before you explicitly tell the system to do so on the last page.     </li> <li>About sub-forms and attachments         On how the different forms are interconnected with one another, and the possible need to transfer figures between different forms. Also on how to retrieve sub-forms and add an attachment.     </li> </ul>	
	• Contact information  About the contact person and the relevant authority, telephone number, email address etc., for further technical or subject-related assistance.	
	• About the form  General guidance and information that cannot naturally be linked to one specific question, question group or page, for example information about purpose and target group, submission deadline, who is responsible for reporting, and in what situations. In addition, statutory information about the legal authority for collecting the information, information about the right of appeal, consequences of not submitting the form and re-use of information. It shall be stated clearly if responding is voluntarily.	
	The information may be presented directly on this page or on separate sub-pages, depending on how extensive and detailed the information is. The help overview does not have to have a <u>standard page layout</u> .	
1.3.3	The text under 'About completion and use' is not form-dependent and must be standardised. It must also appear automatically in the information area on the first form page when the form is opened. The text shall be removed when the form filler leaves the page or selects another help text.	5.2.3
1.3.4	The full title of the form, with the short title, if any, in parentheses, must appear at the top of all <u>form pages</u> , in addition to a clearly expressed statement of who the <u>collector</u> is.	2.3.1 3.1.1
1.3.5	On the bottom of each <u>form page</u> , the 'Previous' (on the left hand side) or the 'Next' (on the right hand side) option must be available as applicable at all times to navigate to the previous/next page. There must be no separate 'Save' button.	<u>5.2.9</u> <u>5.2.13</u>
1.3.6	The <u>help overview</u> (including any sub-pages), the ' <u>Validation page</u> ', and the ' <u>In-depth page</u> ' must contain an option with the text 'Continue' which takes the form filler to the page he had selected when the information page was opened or to the next natural step in the completion process.	5.2.6

1.3.7	The 'Validate Form' button must in general only appear on the last form page. After the validation has been completed, this button must appear on all form pages.	4.3.2
1.3.8	The 'Validate Form' function must lead to a complete form validation (final validation) and present an <u>error summary</u> on a separate <u>validation page</u> . If no errors or irregularities are uncovered, this must be stated on the validation page.	1.3.6
1.3.9	The 'Submit form' button must only appear on the validation page, and only if the validation page does not show any absolute errors.	
1.3.9.a	'Sign and Submit', 'Send' 'Send to xxx' etc. are acceptable alternatives to 'Submit Form' in cases where it is important to signify or differentiate between various procedures. Collective submission of a <u>form set</u> may require specific buttons, functions and interfaces.	

# 2: Structure and Order

### 2.1: Track options and response-dependent questions

The various questions presented in a form often have a varying degree of relevance to different groups of form fillers. Helping large user groups to avoid questions that are not relevant to their situation, is perhaps the most important simplification measure that can be achieved by introducing electronic forms. This requires extensive knowledge of which questions are relevant to which form fillers.

No	Requirements	Reference
2.1.1	In forms where certain categories of <u>form fillers</u> can avoid answering a significant number of questions or are going to answer very different questions, different tracks with relevant form pages must be developed for each of the relevant groups.	
2.1.2	Short <u>sequences</u> of questions that only concern a fraction of <u>declarants</u> (response-dependent questions) should not be available to users other than those they concern.  A long sequence of rarely relevant questions must be established as a specific <u>track</u> or included in a track that is relevant to the declarant group in question.	2.1.3
2.1.3	Response-dependent questions shall be made unavailable by <u>greying</u> or <u>omission</u> . Greying should be used where it provides valuable information about which questions a certain choice will trigger. Omission should be chosen where <i>different</i> (groups of) questions are relevant depending on the previous answers.	Example 3 Example 4 3.4.9
	<u>Labels</u> and <u>input fields</u> for response-dependent questions must only be made available for answering if previous answers indicate that they are relevant. Where a <u>question group</u> is greyed, the group's heading must also be greyed. There must be sharp contrasts between background, greyed elements and active elements.	
	When omitted questions are activated, a space must be made for them in the middle field by moving the elements down. Only elements in the input area must be moved, and their design, the distance between them and their position in relation to each other shall remain unchanged.	
2.1.4	In cases where it is necessary for the purpose of selecting the correct track or response dependent question, an additional <u>filtering question</u> may be added. This shall only be done where the simplification for the form fillers is greater than the additional work generated by the filtering question.	
2.1.5	Questions that trigger <u>response-dependent questions</u> should be presented directly before the response-dependent questions.	2.3.2
2.1.6	Questions that trigger <u>track</u> options should be presented as early as possible in the form.	2.3.2

# 2.2: Paging and Page order

When the scope and order of online form pages are adjusted to fit the medium and the form filler's situation, it may increase the form filler's understanding of the task at hand, the navigation between different pages, and give him or her a better understanding of how different parts of the form completion process are interlinked.

No.	Requirements	Reference
2.2.1	Questions which concern one and the same logical topic should be presented on one and the same <u>form page</u> , even if this means that the form filler will have to scroll vertically. For extensive topics, one should attempt to create logical subcategories and present them individually on separate pages. A reasonable number of form pages is more important than keeping the individual page short.	1.1.6 3.3.3
2.2.2	(Deleted)	
2.2.3	When questions presented on different form pages are closely related, they should be presented in an order that correspond to the form filler's natural chain of thought, normally moving from premises/ingredients to conclusions/summaries.	2.3.2
2.2.4	(Deleted)	
2.2.5	(Deleted)	
2.2.6	Each individual <u>form page</u> should be designed and structured with a view to performance to avoid unreasonably long download times. Presentation of help texts, error messages or activation of response-dependent questions should not result in the entire form page being downloaded again.	2.2.1

### 2.3: Page Structure

If the structure and order of questions are adjusted to fit the web medium and the form filler's situation, it may serve to increase his/her understanding and overview of the separate components of the task. This may require great deviation from any paper version of the form.

No.	Requirements	Reference
2.3.1	All <u>form pages</u> must have a heading (page title) immediately below the form title which describes what is being dealt with on the relevant page. In cases where the page title is not identical to the short title given in the navigation area, the short title must appear in parentheses after the full title.	1.1.3 1.3.4
2.3.2	The order in which the fields appear on a form page must follow a natural logic, from the first to the last (e.g. from last year's figures to this year's, from January to December), and from the various components to the end result (e.g. from price per item to total expenses).	2.2.3
2.3.3	The logical order in which all the elements appear on a form page must follow the natural direction of reading in the culture it is produced for.	

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2.3.4	Applicable elements linked to one and the same input field should be presented in the	Example 3
	following order:	Example 5
	For <u>free text fields:</u>	3.1.2
	< <u>field indicator</u> > <label>, <help symbol="">, <signs (if="" any)="">, &lt; input field&gt;, <descriptive format,="" limit="" term,="" value="">, <inline help=""></inline></descriptive></signs></help></label>	3.1.4
	Inline help must be placed on a separate line below the other elements.	<u>3.4.1</u>
	For <u>selection fields</u> :	
	<field indicator="">, <label>, <help symbol=""></help></label></field>	
	<inline help=""></inline>	
	<radio button="" checkbox="">, <response option="">, <help symbol=""></help></response></radio>	
	<pre><radio button="" checkbox="">, response option&gt;, <help symbol=""></help></radio></pre>	
	()	
	Each individual response option (with pertaining button/box and help symbol) should be aligned to the left on a separate line.	
2.3.5	Where a group of questions on a form page logically belong together (question group), the grouping must be made visually clear and the group must be given a descriptive heading.	Example 1
2.3.5.a	(Deleted)	
2.3.6	In cases where a <u>question group</u> will not be visible within a single <u>screen</u> , one should if possible attempt to create logical sub-groups and present them separately.	
2.3.7	All elements on the form page must be visible on the screen without requiring horizontal scrolling. If necessary, page elements should be placed above each other rather than side by side, to ensure that this requirement is adhered to.	3.2.3
2.3.8	Available value options for checkboxes, radio buttons and drop down lists must have sufficient text for the form filler to understand their meaning.	3.4.5
2.3.9	Values used in lists with many response options must be sorted in an order that is meaningful for the <u>form filler</u> . Where the relevant form fillers in question may be unfamiliar with the options and the order cannot be predicted logically, long lists should be divided or presented in several steps.	

# 3: Form elements

### 3.1: Identification and labels

The label constitutes the primary description or definition of what the form filler is expected to fill in / select in each individual field. In addition, labels, and sometimes also identifying letters or digits, may serve as a reference in the communication with the form filler with regard to the relevant form, topic or field. It is a challenge to find short and concise definitions that are meaningful, and easy to grasp, and to use concepts which the user can be expected to understand, while still managing to convey the complete meaning of the content.

No.	Requirements	Reference
3.1.1	Forms with long complex titles should be given an additional easy-to-understand short title, similar to the short title given to acts of law. The short version of the form title should appear in parentheses after the formal, full title in the form's title field, so that it can be used as a search term.	1.3.4 5.2.2
3.1.2	Any <u>field indicators</u> should be included in front of the <u>label</u> when they are important for guidance or communication purposes in relation to the field, and must be avoided in cases where they are not required.	2.3.4
3.1.3	(Deleted)	
3.1.4	In cases where it is important to the <u>form filler</u> 's understanding, the denomination (e.g. per cent (%)), limit values (e.g. maximum deduction permitted), and/or formats (e.g. date formats), should be described in connection with the <u>input field</u> and not in <u>user-activated help</u> .	2.3.4 Example 6
3.1.5	As far as possible, labels shall be self-explanatory, using a language and concepts that are suitable for the target group insofar as this can be done without compromising the need for accuracy and reasonable use of space.	4.2.2
3.1.6.	The label should be placed on a separate line above the elements that follow, together with any field indicator and/or help symbol.	

### 3.2: Tables

Many forms contain extensive information sets which have to be entered into a table. Traditionally, this involves particular pedagogical and layout-related challenges with regard to electronic forms as well as to their counterparts on paper.

No.	Requirements	Reference
3.2.1	If a similar set of data shall be submitted for an unknown and varying number of items/incidents, and it is not possible to predefine the number of rows, the form must present a dynamic table where the form filler can add and remove rows as needed.	Example 1
3.2.2	If necessary to avoid vertical scrolling, an existing table must be divided into several tables in the web form. The individual parts must be divided logically and be given different easy-to-understand headings.	Example 7
3.2.2.a	(Deleted)	

3.2.3	In tables where labels appear <b>above</b> cells (column headings), vertical scrolling resulting in labels disappearing from the <u>screen</u> when filling in the bottom fields, should be avoided.	
3.2.4	When it is absolutely necessary to utilise the entire width of the page so as to avoid horizontal scrolling in an especially extensive table, it must be presented on a separate form page (table page) without a navigation and/or information area, but with form name, page name and relevant navigation buttons.	1.3.4 1.3.5 2.3.1
	The table page must have a separate page name in the navigation menu (when this menu is presented on <i>other</i> pages)	
3.2.4.a	As an alternative, you can fill in each item in the table	3.2.2
	<ul> <li>in a particular question group immediately above or below the table, or</li> <li>in an input solution that is not part of the form but accessible from the relevant form page.</li> </ul>	3.2.5 3.4.10
	The most important input data for each item shall be transferred to the table, and it must be possible to delete an item or open it to make changes/corrections.	
	This solution shall only be used where a table is absolutely necessary and where splitting the table to avoid horizontal scrolling is inexpedient.	
3.2.5	Questions must not be presented as a table if presenting them individually or in question groups make them easier for the form filler to understand.	

### 3.3: Figure Processing in Forms

Many questions used in forms are meant to serve as an educational tool, guiding the form filler toward the correct answer to complicated calculations based on more familiar numbers and values. A uniform notation and information about numbers and how they relate to each other will increase the form filler's understanding of an area that is of critical importance to data quality.

No		Reference
3.3.1	An <u>input field</u> which receives value(s) <b>automatically</b> from one or more other field(s) that are not visible to the form filler at the same time as the <u>receiving field</u> , must be supplied with a help text explaining where the figure(s) came from. Where it is especially important to communicate where the information comes from, the help text should be <u>inline</u> .  The connection should also be explained in a <u>user-activated help</u> text associated to the field(s) from which the information is transferred.	3.3.7 4.2.3
3.3.2	<b>Manual</b> transfer of text, or manual copying to /summation of figures in another input field in the same or a different form should be avoided. In cases where the form filler still has to manually transfer a value from one field to another, this operation must be explained in an <u>inline help</u> text next to both the <u>sending field</u> and the <u>receiving field</u> .	4.2.1 Clarification
3.3.3	Figures that are part of summations and calculations should be kept on a single <u>form</u> <u>page</u> to reduce the need for calculations and transfer of values across pages.	2.2.1
3.3.4	When a summation has to stretch across several form pages, interim sums should appear at the bottom of each page.	
3.3.5	(Deleted )	

3.3.6	(Deleted)	
3.3.7	In cases where it may be particularly unclear where a calculated figure originates from, the calculation formula or basis should be described in <u>inline help</u> . Less important formulas may be included as <u>user-activated help</u> .	<u>4.2.1</u> <u>4.2.3</u>

# 3.4: Conventions and Symbol Use

In time, many experienced users have become familiar with various standard symbols and descriptions on the Internet. Compliance with the conventions will ease the form filler's understanding of the functionality and usage of the web form.

No.	Requirements	Reference
3.4.1	For fields that are assigned <u>user-activated help</u> texts, a clickable symbol leading to the relevant help text must be inserted.	1.2.3 2.3.4
	For <u>question groups</u> and isolated <u>free-text fields</u> , the symbol must be placed directly after the <u>label</u> . For <u>selection fields</u> , it must be placed behind the individual response option.	Example 3 Example 5
3.4.2	The <u>help symbol</u> must alter appearance when <u>user-activated help</u> is activated, i.e. when the form filler has clicked the symbol.	
3.4.3	Checkboxes must be used where the form filler is permitted to select more than one of a series of predefined answers (multiple choice questions), while drop down lists or radio buttons must be used where only one answer is permitted (single choice questions).	
3.4.4	For official forms, pre-selected values should not be provided for checkboxes, drop down lists or radio buttons. Where non-committal answers are permitted, 'Don't know', 'Not applicable' or 'I do not wish to reply' etc. must be among the selectable options.	
3.4.5	Selection fields should be used rather than <u>free-text fields</u> , where this makes it easier for the form filler to understand and complete the task.	2.3.8
	Long lists should be avoided if it is just as easy to fill in text or digits.	
3.4.6	To save space, a drop down list should be preferred to radio buttons when presenting a large number of mutually exclusive response options	2.3.9
3.4.7	(Deleted)	
3.4.8	The following should be the standard order for elements that can receive focus by using the tab key on the keyboard: Help symbol (if any) for the first input field → the input field (or first value from the top of the options list) → forward button to the next form page (or the next natural option) →other elements on the page (if any).	
	Greyed fields are skipped in the tab sequence.	
3.4.9	Fonts, font sizes, colours and other graphic elements must be used consistently and uniformly in all forms issued by the same <u>collector</u> . The forms must differentiate clearly between various types of elements (headings, category headings, labels, error messages and warnings etc.). It must be easy to read the font on the screen. Fonts that are already installed and correctly displayed on most computers should be preferred. As a general rule, the colours used should provide good contrast.	4.2.9

3.4.10	The form must comply with current conventions relating to web accessibility for all, including WAI requirements and general W3C conventions, in line with national regulations.	
3.4.11	In official forms, no asterisks (*) or other means of visualisation should be used to mark mandatory questions. Questions that are not relevant to the individual form filler or situation will normally be unavailable (track selection, greying or omission).	3.4.4
	If a question is voluntary in a form that is subject to a submission requirement, this shall be explained in the label or in an inline help text.	
3.4.12	The length and shape of a free-text field should be in reasonable proportion to the amount of data expected to be filled in.	
3.4.13	Where <u>selection field</u> options are not exhaustive or understandable for all <u>form fillers</u> , a response option such as 'Other' or similar should be included, with an associated <u>free-text field</u> . Where such an option is included, the free-text field should be greyed until this option has been chosen.	Example 3
3.4.14	The form should contain separate <u>free-text field(s)</u> where the form filler can enter comments in his/her own words. In that connection, it must be specified that it is voluntary to fill in the field. In forms that are not specifically adapted for the submission of sensitive personal information, an inline help text must warn against writing such information in the field.	Clarification

# 4: Help and Feedback Messages

## 4.1: Prefilling

Applied correctly, prefilled data can ease the workload for the form filler. But checking prefilled data can also be a time consuming task. And prefilled information that cannot be corrected in the same form can be more confusing than helpful. Appropriate use of prefilled data requires some general rules of play.

No.	Requirements	Reference
4.1.1	Information which the <u>collector</u> has access to internally or from other sources, should only be presented in the form if the presentation is relevant to the <u>form filler</u> .	
4.1.2	When it is necessary to check if registered information is (still) correct, this information should be prefilled in the form. The same applies to fixed deduction rates and other constants in calculations which may be useful to the form filler.	
4.1.3	Prefilled <b>information</b> , for example from public registers, which the form filler cannot change, should appear as text (unframed field), while editable prefilled values must be presented in a <u>free-text field</u> .	Example 9
4.1.4	In cases where prefilled register data cannot be altered in the form, information on how to report changes elsewhere must be provided in an <u>inline help</u> text.	

### 4.2: Help texts

In paper-based reporting, providing sufficient information to the unskilled form filler, without overburdening the expert with unnecessary details, has always been a problem. Correct use of optional (clickable) help texts, combined with conscious use of information which all users are exposed to, is a good solution to this dilemma. Optional, clickable information elements at different stages of the completion process ensure that the information is displayed at the right time, and only to those who need it.

No.	Requirements	Reference
4.2.1	Help texts believed to be a necessary supplement to a heading or <u>label</u> , must be presented as a brief text in the <u>input area</u> as <u>inline help</u> .	1.2.3 3.1.5
	Inline help can also be used at the top of a form page to inform about the page topic, and/or at the top of the first page to provide important general information about the form.	3.3.2
	Where a more extensive textual presentation is required, this information must be supplemented with more detailed <u>user-activated help</u> .	
4.2.2	Where the label, supplemented by any inline help, cannot be made sufficiently understandable, explanatory user-activated help must be available. Avoid help texts where they do not provide additional information of relevance to any user group.	3.1.4 3.1.5
4.2.3	Explanations provided in user-activated help must be adapted to members of the target group who do not make use of professional advisers or complete their form using professional systems.	
4.2.4	No user-activated help text should exceed the height of one screen.	1.2.5

4.2.5	In cases where it is necessary to provide more extensive <u>user-activated help</u> , it should be presented in two layers, so that a basic general description points to a separate indepth description. The in-depth description must be presented on a separate page (indepth page) which does not have to follow the <u>standard page layout</u> .	1.3.6
4.2.6	Where it may be useful to the form filler, the help texts should contain links to other fields, words or phrases in the form. Links may also be provided to external information for particularly interested users or particular user groups, if the text specifies clearly what kind of information the link leads to, and who it concerns. Links to information that is irrelevant to filling in the form should be avoided.  It must be easy for the form filler to return to the right place in the form.	
	<u> </u>	
4.2.7	Important general information that is not related to a question, a question group or a form page, must be presented on a separate help page (Help overview) to the form in general.	1.3.2
4.2.8	Considerable effort should be put into tailor-making text for web presentation. In general, the help texts must be shorter, more structured and divided into smaller segments than what would have been acceptable for guidance material produced on paper.	
4.2.9	The readability of help texts should be increased through use of typographic means. Except for very brief phrases, the texts should be broken into a series of easily readable chunks with highlighted headings and keywords.	3.4.9

# 4.3: Error Messages and Warnings

In web forms it is possible to give feedback on errors and mistakes before submission. This saves time and effort for both the declarant and the collector. Wherever the form filler is halted by automatic validations, it is important to provide clear information about how to correct it.

Nr	Requirements	Reference					
4.3.1	In cases of <b>incorrect completion</b> of individual fields, an <u>error message</u> must appear automatically as soon as possible after the error was made. The text must appear in the <u>information area</u> and the relevant <u>input field</u> must be clearly marked. Messages presented in a separate window (dialog boxes or pop-ups) must not be used.						
	In forms where the order of completion is optional, the form filler must be permitted to move to another place in the form without correcting the error, provided that the question does not have to be answered to provide the basis for subsequent <u>track</u> choices.						
	Unanswered individual questions must not lead to an automatic error message in forms with an optional order of completion.						
4.3.1.a	In forms where the order of completion is locked, lack of response to fields must also result in an error message as soon as possible or, at least, before the form filler leaves the page.	1.1.4.a					
	Errors in connection with <u>cross-validation</u> in such forms must be reported as soon as possible after filling out the final field included in the validation.						
4.3.2	An overview of all remaining absolute errors and/or improbabilities must be presented in an all-inclusive <u>error summary</u> on a separate <u>validation page</u> when the form filler selects 'Validate form'.	1.2.4 1.3.6					
		1.3.7					

4.3.3	The validations should include <u>warnings</u> relating to unusual, though permitted values or combinations of values (such as improbable deviations from the current date or from known average values, improbable combinations of turnover / number of employees or age / number of children). The error summary must indicate clearly which of the errors listed are absolute errors and which are improbabilities.	
4.3.4	When the form filler clicks an error in the error summary on the <u>validation page</u> , he/she must be directed to the right place in the form, where the relevant <u>input field</u> /fields must be clearly marked and the complete error message must appear in the information area.	1.2.5
4.3.5	Once the form filler has corrected the error or made other changes, the error summary must be updated the next time the validation page is presented.	
4.3.6	The purpose of an <u>error message</u> is to help the form filler to continue. The error message shall not stress what he/she did <b>wrong</b> , but point out how to fill in the fields <b>correctly</b> .	
4.3.7	The purpose of a <u>warning</u> is to make the form filler reconsider whether the field has been correctly filled in. The text used in the warning, or on the validation page, must specify clearly that the value/combinations entered will be accepted as valid without alterations.	
4.3.8	Error messages relating to a <u>cross-validation</u> must include a standard text explaining that the (possible) error may be found in any of the fields included in the validation. All the relevant fields included in the validation must be marked as containing errors/possible errors.	Clarification
4.3.9	An error message must not exceed the height of one screen.	1.2.5
4.3.10	If a question must be answered to provide a basis for subsequent track choices, an error message must automatically appear as the form filler attempts to leave the page. Such error messages should have a <u>standardised text</u> explaining why the question must be answered at that point in time.	4.3.11 Clarification
4.3.11	If the form filler attempts to leave the form page despite an error message stating that the question <b>must</b> be answered in order to continue, the text of the error message should be repeated in a <u>modal dialog box</u> . It must only be possible to remove this message by clicking the close symbol or 'OK' button in the box. The box must not contain other information or functionality.	Example 10 3.4.10 4.3.10
	<del></del>	

# 5: The Form Environment

### 5.1: Concluding Messages

People are often more in doubt as to whether reports submitted online will reach the intended recipient than when they use regular mail. It is therefore important that the form filler receives a clear confirmation that the submission has been completed and that clear information is provided with regard to any further activities that are expected between the parties.

No.	Requirements	Reference
5.1.1	Following submission, the form filler must be directed to a confirmation page where it is confirmed that submission has been completed. The confirmation page must identify the <u>collector</u> and provide identification information about the <u>declarant</u> . The confirmation page must include a reference number to be used in future communication with the declarant/ <u>form filler</u> .	
5.1.2	(Deleted)	
5.1.3	The confirmation page should state clearly that new errors may be discovered during the processing of the answers received.	Clarification
5.1.4	On the confirmation page, the form filler must have the opportunity to print the confirmation page, and to receive it by email.	
5.1.5	If the reporting is connected to a payment transaction, the amount, the recipient's account number, KID number and other relevant information (if any) must be included on the confirmation page.	
5.1.6	When no absolute errors are displayed on the validation page after final validation, the form filler should be given access to a presentation of all completed/selected fields with labels.	1.3.8 5.2.6

### 5.2: Other External Functions related to the Form

Electronic forms are to a varying degree supported by surrounding systems. They may be part of a dedicated forms portal and interact closely with this, or they may be free-standing applications. Another difference is that some forms can be submitted openly on the web while others require specific login/authentification mechanisms. For the form filler's sake, access to relevant support functions that are not part of the actual form completion should appear and behave as uniformly as possible, irrespective of these variations.

No.	Requirements	Reference
5.2.1	As far as possible, the <u>collector</u> must facilitate deep linking to the individual form from external websites and own websites. This means that the link must lead directly to the form and not to a general website or an intermediate page level. For sites with logins, users who have followed the form link must be sent directly to the relevant form after login.	
5.2.2	As far as possible, the <u>collector</u> must facilitate that both external and internal searches are able to locate all forms, including all parts of a form set, whether the search phrase include elements of the full title of the form, or its short title (if any).	3.1.1

5.2.3	As far as possible, the <u>collector</u> must facilitate that the text presented under <b>About the Form</b> is accessible from both external and internal form overviews and collections of links, before the form is selected.	1.3.3
5.2.4	In forms that require login, the form filler must at all times be informed that he/she is logged in and he/she must have easy access to log out. The user name or other identifying information must be presented in the top right hand corner of every page together with a log-out button.	
5.2.5	The user experience of forms and form environments must be approximately the same for all browsers and operating systems that are more than marginally used in the market.	
5.2.6	It must be possible to print out the entire form or relevant parts of the form, i.e. all labels, response options and entered replies (if any) both before, during, and after completion. In addition, the form must facilitate for <i>separate</i> printouts of the confirmation page, the validation page, the help overview and in depth pages (if any).	
5.2.7	In cases where the <u>form filler</u> will have to select a value from a comprehensive code set, he/she must be given easy access to the alternatives through a built-in search function, or other suitable well-constructed dialog. The selected code should be entered automatically into the relevant field.	2.3.9
5.2.8	Prior to submission of <u>form sets</u> , an overview must be presented, indicating which forms are included in the submission.	
5.2.9	All entered data in a form must be saved automatically as often as possible during completion.	1.3.5
5.2.10	In order to ensure legal protection and traceability for the <u>declarant</u> , it must be possible to retrieve an authentic representation of all data entered, into the same form version that was used during completion of the form.	
5.2.11	As far as possible, the <u>collector</u> must ensure that the form can be viewed without disturbing elements appearing on the screen. Any portal-related menus, links and information elements should be placed above the form. Functionality and navigation that are not part of the form should be available only if directly relevant to the form filler.	
5.2.12	All page elements should be downloaded in one go, so that the form filler does not have to wait for the page to reload when retrieving help texts, activating response-dependent questions etc.	
5.2.13	It must be possible for the form filler to interrupt completion of the form and continue later. The continue option must be explained and easily accessible.	Example 11

# **Definitions**

Term	Explanation
Absolute error	An answer that does not permit submission in its present form.
Collector	The authority or private enterprise that asks the questions and receives and uses the answers from a form. Where one collector asks for information that will also be used by others, we differentiate between primary and secondary collectors.
Confirmation page	Page confirming that submission of of the form / form set was successful. This page is not part of the form and is not required to have the <u>standard page layout</u> .
Cross-validation	Automatic control of consistency between the content of several <u>input fields</u> .
Declarant	The one that has right or duty to report information and is responsible for reporting, independently of whether this person fills out the form himself or gives others that authority (e.g. bookkeeper, accountant). In our context this can be persons, self-employed tradesmen, public companies or other legal persons.
Error message	A description of <i>what</i> is wrong or <u>improbable</u> in the answer to a question or of inconsistencies between answers and of <i>how</i> such errors can be rectified.
Error summary	Short overview of <u>input fields</u> containing absolute errors and <u>improbabilities</u> after automatic validation of the form. The error summary is shown on a separate <u>validation page</u> . Other fields are not to be reflected on the validation page.
Field indicator	A letter, digit, symbol or combination of same that unambiguously identifies a single question in one and the same form.
Filtering question	A question for the sole purpose of providing background information for selecting tracks or response-dependant questions.
Final validation	A final review of all automatic validations. Submission shall not be possible if absolute errors are identified during final validation.
Form	A collection of questions and explanations under a single name that facilitates the declaration and submission of a limited set of information on behalf of one <u>declarant</u> in one delivery.
Form filler	The (physical) person that goes through and answers the questions in a form, or prepares data from one or more files in order to submit them to a <u>collector</u> . This can be the <u>declarant</u> himself when reporting on behalf of a physical person. It can also be an employee of the declarant, or someone at the declarant's accountant, bookkeeper, lawyer etc.
Form page	A collection of information elements and selection fields in a form that is available as an option in the navigation menu or by use a previous/next button. With the exception of the <u>table pages</u> , form pages shall have a <u>standard page layout</u> . <u>Information pages</u> are not form pages.
Form set	Collection of forms and attachments that are signed and submitted in one process. Where the submission process requires the inclusion of one particular form, that form is called the <i>primary form</i> and the rest are called <i>sub-forms</i> .
Free-text field	Input field where the form filler enters letters and/or digits as free text or with specific content requirements (e.g. entering a valid postal code).

Greyed	An indication of passive options or input fields that are not available in a given situation. The option or field and associated <u>labels</u> and, if applicable, <u>inline help</u> texts, are made lighter in appearance (usually grey) than the active characters /fields. See also <u>Omission</u> .
Help overview	A separate page with access to general information and contact information, either directly or via links to sub-pages. The help overview does not need to follow the standard page layout.
Help symbol	A clickable symbol that retrieves <u>user-activated help</u> . The appearance of the symbol changes when it is clicked.
Improbabilities	Unusual, but permitted, values or combinations of values. Improbabilities identified during automatic form validation are presented in the error summary together with <u>absolute errors</u> .
In-depth page	A separate page providing a more thorough presentation of a topic in user-activated help text (in-depth text). The In-depth page is not part of the form and does not have to follow the <u>standard page layout</u> .
Information area	Defined area on a given form page for presentation of <u>user-activated help</u> texts, <u>error messages</u> and <u>warnings</u> .
Information page	Pages linked to a form that has no input fields. Information pages are not listed in the navigation menu and cannot be viewed using the 'Previous' or 'Next' button. Defined information pages are <u>Help overview</u> , <u>Validation page</u> , <u>Confirmation page</u> and, if applicable, <u>In-depth page</u> .
Inline help	Brief guidance presented inline in the input area.
Input area	The area between the navigation area and the information area. This is where the form's labels, input fields, help symbols and inline help are presented.
Input field	Visually marked and limited area in which the form filler enters information or choses among permitted values to answer the form's labels (questions). Collective term for <u>free-text field</u> and <u>selection field</u> .
Label	The actual question to be answered or the primary description of what information to give in the corresponding input field.
Modal dialog box	Dialog box that blocks other interaction by dimming the surroundings. In an ELMER form, the dialog box shall only be used to repeat an <u>error message</u> when the form filler attempts to leave the form page after having received an ordinary error message that a question <b>must</b> be answered before he can proceed.
Navigation area	Defined area within the current form page with an overview/list over all pages in the form. The current page is visually emphasized and normally the user can freely choose which page to view.
Omission	An omitted presentation of one or more response-dependant question(s) until they are activated, if at all, by other (previous) questions being answered. See also the definition of 'Greyed'.
Page	See <u>form page</u> .
Page overview	A presentation of all page names in a form. The page overview is presented in the navigation area and is normally clickable so that the form filler is free to choose in what order he wishes to fill in the pages.
Question	See <u>label</u>

Question group	A collection of questions on a form page that are visually linked based on being strongly related to a single page topic.			
Receiving field	Input field to which a value (usually an amount) is transferred from another field in the same or another form, either manually or automatically.			
Response-dependant question	Questions that are enabled only if relevant according to previously given answers in the same form, or previously registered information.			
Screen	All items that it is possible for the form filler to view at the same time if the screen resolution is 1024 x 768 pixels or higher.			
Selection field	<u>Input field</u> where the form filler selects a pre-defined listed option or fixed value without entering any content himself. The selection field can be a single or multiple choice field.			
Sending field	Input field from which the value (usually an amount) is transferred to another field in the same or another form, either manually or automatically.			
Sequence	A collection of elements (pages, questions or groups of questions) that together form a thematic whole.			
Standard page layout	Division of the form page into <u>navigation area</u> , <u>input area</u> and <u>information area</u> . Use of the standard page layout requires compliance with the ELMER guidelines for tab sequence, buttons, and text and design elements.			
Standardised text	Identical wording of text for a given purpose for all forms from one given <u>collector</u> .			
Table page	Special form page designed to present a table that would normally require horizontal scrolling in standard page layout.			
Track	Collection of pages that are presented for a particular group of declarants or declarants in a particular situation. The selection of track can be based on previous answers in the current form or on information that is already known. The tracks can partly, but not exclusively, be put together of identical pages.			
User-activated help	Information that can be explicitly requested by the form filler.			
Validation	Control of the validity of the value(s) entered in an <u>input field</u> or a combination of input fields measured in relation to defined requirements or definitions.			
Validation page	Page that lists the results of automatic form validation. The page contains an <u>error summary</u> or a message declaring that no errors are detected. The Validation page is not part of the form and does not follow the <u>standard page layout</u> .			
Warning	Description of <i>what</i> seems unlikely or unreasonable in the filling out of a field or between fields. The warning must be shown close to the field. The corresponding field must also be visually emphasized. Contrary to absolute errors, warnings do not hinder the form from being submitted.			

ELMER version 2.1

# Clarifications and Examples

#### Clarifications

#### Clarification 1.1.5

Suggested standardised text where the user is permitted to select pages at random:

Click in the menu to select a page.

### Suggested Standardised text for forms with fixed page order:

In this form, you may not select pages by clicking in the menu.

### **Clarification 3.3.2**

Manual transfer of field values is first and foremost relevant to transfers between different forms.

Suggested inline text to be used next to sending fields:

Suggested inline text to be used next to receiving

Transfer to <field (or form) description>.

Enter value from < field (or form) description>.

#### Clarification 3.4.14

### Proposals for standardised text to warn against sensitive personal information (in forms with inadequate security levels)

Note! Do no write any sensitive personal information (e.g. information regarding illness and health) in this form.

### Clarification 4.3.8

Suggested standardised text to conclude a message following a cross validation:

#### In error messages:

# In warnings:

Please check all the marked fields to find out where an Please consider whether or not some of the marked error has occurred.

fields should be altered before submission.

### Clarification 4.3.10

### Proposal for standardised text for error message relating to questions that trigger track choices

Please answer the question before you continue. This is necessary for you to be asked the right questions later in this form.

#### Clarification 5.1.3

### Suggested standardised text:

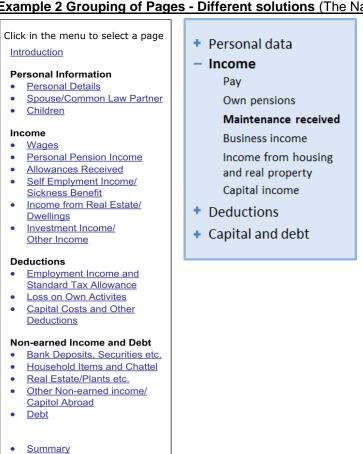
This form has been through an automated check during completion, It is nonetheless possible that errors will be discovered during processing, and that additional documentation may be required. If you wish to contact us regarding this matter, please refer to your organisation number and reference number. Thank you for your cooperation.

### **Examples**

### Example 1 Overview (All Areas)



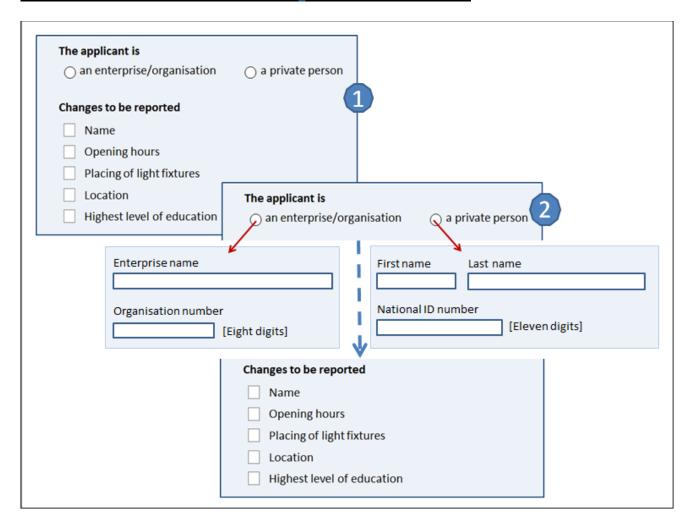
### **Example 2 Grouping of Pages - Different solutions** (The Navigation Area)



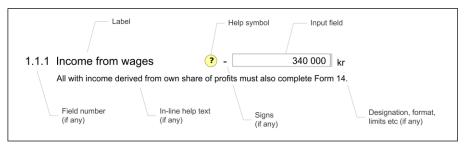
### Example 3 Response-dependent Questions - Greyed (The Input Area)

Have the dwelling undergone energy saving measures during the period?  Yes No
Type of energy saving measure
Only include measures implemented after 31 December 2009
Water-saving shower
Weather stripping
Insulation of walls, ceilings/roof and/or floors
Replacement of windows
Upgrading of heat sources
Other (Specify below)

### Example 4 Response-dependent Questions – Expanding (The input area)



### Example 5 The Order of Field Elements (The Input Area)



### **Example 6 Field Designations** (The Input Area)

Postal Code/City	
Date	(dd.mm.yyyy)
Amount	(Max 3.400)
Percentage of Income	percent

### Example 7 Portion of Table (The Input Area)

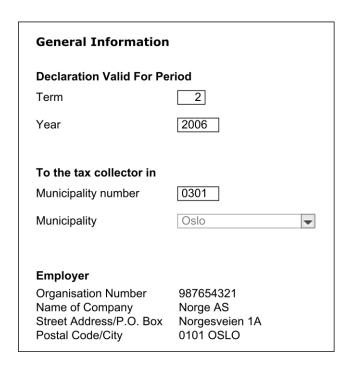
Hours per month						
<b>First half-year</b> Name	Jan	Feb	Mar	Apr	May	Jun
Per						
Kari						
Ola						
Anne						
Petter						
Second half-year Name	Jul	Aug	Sep	Oct	Nov	Dec
Per						
Kari						
Ola						
Anne						
Petter						

### **Example 8 Error Message indicating Incorrect Completion of Individual field**

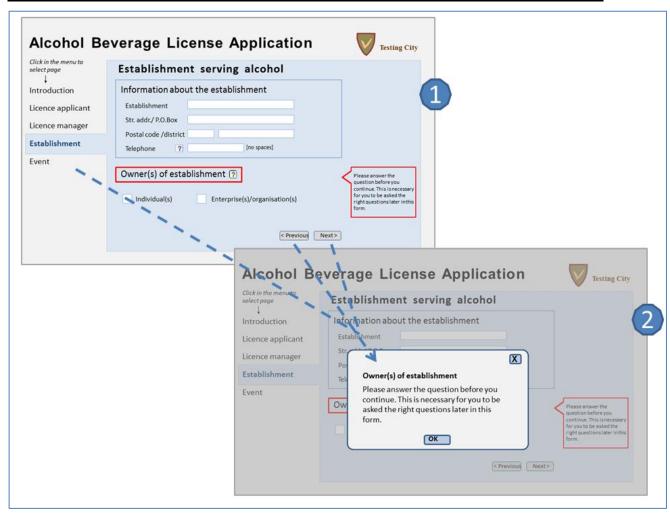
(The Input and Information Area)



### Example 9 Prefilled Information which cannot be Altered (The Input Area)



### Example 10 Inadequate response to questions forming the basis for subsequent track options



### Example 11 Interrupt completion of the form to continue later - Possible solution

