



6 Keys to Creating a User-Friendly Form

This is an extra resource to go along with the original article:
[Creating an effective pre-appointment questionnaire](#)

Your patients want forms that are clear and easy to use. Here are 6 keys that you can use to create user-friendly forms that will create a higher quality experience for your patients...and help your practice remain organized and informed.

1. Be clear

Read your forms as if you are an incoming patient with little to zero information about your practice. Are your questions clear and easy to understand? Is it obvious what you would like your patients to write? If not, give a few “example answers” to make it clear.

2. Organize your form into sections

If your form involves several different types of information, organize your form into sections. For example, ask for basic information (such as contact information) in one section. Then, focus on lifestyle, medical history, and symptoms in different sections.

3. Give your patients sufficient room to write in answers

Make sure to give patients sufficient space to write their answers. An “easy fix” for this potential problem is simply to use electronic forms (as explained in Key #5)

4. Use a clean design and avoid graphics

Choose a form with simple, clean lines to avoid visual clutter and distraction. Avoid graphics.

5. Go electronic

Electronic forms are more efficient for both patient and provider. Your patients will also appreciate being able to fill out and send forms before the day of their appointment.

6. Include an open-ended question

An open-ended question gives patients the opportunity to give any additional information they might want to share with you.