

Improving Form Filling



Name: _____

Improving FORM FILLING

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Introduction

Information and skills you will acquire

Improving Form Filling is one of a valuable and user-friendly new series of easy-to-read booklets created specially to help you develop at work. The materials have been created from actual experience in workplace training. Experts from Workbase Training and the Campaign for Learning have pooled their knowledge and experience to involve you in learning new skills and building on those you already have. The booklet is divided into clear sections, containing specially devised activities and a mini project, to allow you to practice as you learn.

Improving Form Filling will enable you to:

- Know the difference between simple and complex forms.
- Identify and understand common words found on forms.
- Understand what information is required on any particular form.
- Fill in forms of different types.
- You may want to work your way through the booklet from start to finish or focus on an area of interest.
- Once you have completed the questionnaire on page 4 you will be able to see clearly which topics you need most help with, and which areas you can safely leave out.
- The questionnaire will also allow you to create your own learning plan, for which an example and space is provided on page 5.
- You may want to ask your supervisor or another colleague for their views on the areas you could work on, or for help with the activities in the booklet.
- As you may want to use the booklet for future reference, you may want to write the answers out in rough first and then write them in the booklet.

Getting the most out of this booklet

Questionnaire

This questionnaire is to enable you to think about what form filling skills you need most help with.

Tick boxes as appropriate

What do you need most help with?	How often do you need this information/do this in your job?				How confident do you feel?		
	A	B	C	D	1	2	3
	not at all	not very often	fairly often	frequently	not at all	fairly	very
SECTION 1: Understanding different types of forms							
SECTION 2: Understanding the words used on forms							
SECTION 3: Completing forms effectively							
SECTION 4: Checking your completed forms							

The most important areas for you to work on are those which you have marked B, C, D, and 1 or 2.

Section I

DIFFERENT TYPES OF FORMS

There are many different types of forms that we may be required to complete, either in the workplace or in day-to-day life. Some of these forms are simple and some are more complex.

Simple forms

These are forms that require only basic information, e.g. name, address and telephone number. They are usually easy to understand, well laid out and the instructions clear and simple.

Examples of simple forms are: an application for a library ticket, a company message form, a self-certification form for days off work.

Complex forms

If you are applying for a job or writing a report of an accident you are likely to have to complete a more complex form. These are forms that require more detailed information and lengthier answers.

Examples of more complex forms are: an accident report form, an application for training at your place of work, a passport application, an application for child benefit, a form for sending a fax message.

If you are having difficulty completing a form, it may be the form that is at fault and not you! Forms are sometimes badly designed and their instructions not always clear. Whatever the case, this booklet will help you to understand forms more easily.

Activity I

Think about the forms you have had to fill in. What features make them difficult to complete and what features make them easy?

Tick the points that make form filling difficult for you and add any others in the space below:

- Understanding the words
- Following the layout
- Filling in the boxes
- Fitting my handwriting into the spaces provided
- Numbering of items
- The amount of information required
- Having to collect a lot of information

Tick the points that make form filling easy for you and add any others in the space below:

- Words which are easy to understand
 - Knowing where to write on the form
 - Only personal details, e.g. name and address, being required
 - Having enough space to write in
 - Not having to find out a lot of information
- _____

Activity 2

The form below requires personal details, which you are likely to be asked to provide on almost all forms. Note that sometimes you will be asked to fill in forms using only capital letters, while for others you may need to use ordinary handwriting. Always follow the instructions carefully. Complete the form, then look at the example given in the feedback section.

PERSONAL DETAILS	
Please write clearly in BLACK INK and CAPITAL LETTERS.	
SURNAME	_____
FIRST NAME(S)	_____
ADDRESS	_____ _____ _____
DATE OF BIRTH	_____
SIGNED	_____
DATE	_____

You will find the feedback to this activity on page 20.

Key Learning Points

- Many forms are simple and require only basic information such as your name and address.
- Complex forms, such as applications for a passport or for employment, require more detailed information.
- If you have difficulty in completing a form this may be caused by the form being badly designed or unclear rather than your lack of skill.
- There are other difficulties that people may experience when completing forms. These include: not having enough space to write in, not understanding the numbering system, and not having the required information at hand.

Section 2

UNDERSTANDING THE WORDS USED ON FORMS

Filling in forms becomes much easier if you understand the meaning of the words used. The next activity will help you to become familiar with some of the words frequently used on forms.

Activity 3

Below are some words which often appear on forms. Write in the meaning against each word. Use a dictionary if you are unsure of the meaning of any of the words.

Word(s)	Meaning	Word(s)	Meaning
Referee		Previous	
Place of residence		Location	
Remuneration		Forename	
Maiden name		Occupation	
Marital status		Qualifications	
Employment		Next of kin	
<p><i>You will find the feedback to this activity on page 20.</i></p>		Surname	

Completing a job application form

In Activity 4 you are asked to complete a job application form. This is one of the most important forms that people are required to complete. Here are a few tips which you may find useful before you complete the form.

- Always read and follow any instructions given to you on or with the form.
- Complete the form in block letters and black ink or in type unless you are asked to do otherwise.
- If you are asked to demonstrate that you have a particular skill, explain how you have previously used this skill. Use job-related examples if you can, but if this is not possible then use examples from non-work activities, e.g. helping at a playgroup.
- Try to write neatly and legibly.
- Complete the form in light pencil first of all, then rub it out and write over it in ink.
- Use a dictionary if you are unsure of the meaning of any of the words on the form.

Activity 4

A job you are interested in has been advertised in your local paper. You have decided to apply. Choose an appropriate job title and complete the following application form in BLOCK CAPITALS and black ink, using your own background. (The purpose of this activity is to give you practice in completing a job application.)

Application for the post of _____
at _____
Surname _____
(Mr/Mrs/Miss/Ms) Delete where not applicable
Forenames _____
Maiden name (where applicable) _____
Date of birth _____
Address _____

_____ Postcode _____ Telephone no. _____

Form continued opposite ...

Details of any special training/apprenticeship, development, etc. with dates and qualifications held

Are you registered under the Disabled Persons Act? YES/NO

If yes, please give registration number _____

Current and Previous Employment

Please give details of your current and previous employment. If you are not in paid employment, please give details of any voluntary or other activities you are involved in. Start with your current or most recent activity or employment. Use extra sheets if necessary.

Position and brief description of duties	Employer's name, address and telephone number, and name of person to contact	Date commenced employment (From)	Date finished employment (To)

You will find an example form on page 20.

Key Learning Points

- It is important that you understand what information is required on a form.
- Certain words are used frequently on forms. Such words include: surname, marital status, next of kin, and occupation. It is important that you understand the meaning of these words.
- You need to be familiar with the words and phrases that commonly appear on job application forms.
- Sometimes the information you are asked for will be specific. For example, a form used to request work clothes would require details of sizes. An application form to join an organisation's pension scheme would require details of age, partner and salary. There is no need to worry about this specific information because there will generally be someone to give advice.

Section 3

COMPLETING FORMS EFFECTIVELY

Whatever types of forms you are required to complete, there are some general rules that will help you tackle this task and enable you to do it in the most effective way. Read the tips below.

Tips for filling in forms

- Allow enough time, so that you can make a good job of filling in the form.
- Read through the form and look up any unfamiliar words in your dictionary.
- Collect together any documents and information you need.
- Do a rough draft first.
- Ask someone to check what you have written if you are not sure whether it is the right information.
- Write in pencil first, then go over it in pen and rub out the pencil marks when you're sure it's right.
- Write N/A (not applicable) beside any questions which do not apply to you.
- When you have finished, use the form-filling checklist on page 18 to check that you haven't forgotten anything.
- Make a copy of your completed form so that you have a reminder of what you have written. This will also help you next time you have to fill in a similar form.

Activity 5

You would like to apply for a training course in computing. Using the tips above, complete the form below, then look at the example on page 22.

APPLICATION FOR COMPUTER TRAINING	
Name:	_____
Job title:	_____ Section: _____
Extension number:	_____
Home address:	_____
	_____ Postcode: _____

Form continued on page 14 ...

Telephone number: _____ Date of birth: _____

State briefly the training you would like to do and why.

Describe briefly any training you have received.

How would you like to study (e.g. in a group, self-study, one to one)?

Is there any other information you would like to add?

Key Learning Points

- Take your time when completing a form to ensure that you make a good job of it.
- Read through the whole form and any instructions that go with it before attempting to fill it in.
- Collect all the necessary information and do a rough draft first.
- Write in pencil on the form first of all and ask someone to check it for you.

Section 4 CHECKING YOUR COMPLETED FORMS

The more practice you have at filling in and checking forms, the better you will become at it.

Once you have completed a form, it is vital to check that you have:

- filled in all the relevant sections of the form
- not made any spelling or punctuation errors
- put down the correct information
- signed the form if necessary.

On page 18 is a checklist to help you ensure that you have completed your forms effectively.

Self-certification Forms

If you are absent from work because of illness you will usually have to complete a self-certification form when you return to work. This will also apply if you are absent for any other reason. Such forms are normally straightforward but it is important to fill them in correctly.

Activity 6

Complete the self-certification form on the next page on behalf of John Brown, using the following details:

John Brown works for A1 Computers; he is based at the Watford site. He has been off work for three days because he strained his back while he was moving computer equipment to a client's premises. He informed his manager, Dilip Sangit, when he returned from the client's premises on Monday, 17 May and Dilip sent him immediately to the doctor. The doctor recommended that he rest in bed for three days to prevent his back pain from getting worse. John informed his manager by telephone, after visiting the doctor, that he would be away for three days from the following day. He started his sick leave on Tuesday, 18 May and his last day off work was Thursday, 20 May.

You will find the feedback to this activity on page 22.

Accident report forms

If you were the only person there when an accident happened at work, you would probably be asked to complete an accident report form. Do not worry if this seems difficult, there will always be someone to help.

Activity 7

Fill in the accident report form below, using the following details:

Owain Jones, aged 32, works for A1 Computers. He and his colleague, John Brown, aged 50, were delivering computer equipment to a client at an industrial estate in Slough on Monday, 17 May. While John was unloading the computer equipment from the van, he strained his back. Owain had to help him and then had to carry the remaining equipment into the client's premises by himself. The delivery took place at 9.30 in the morning and, after the delivery was completed, both Owain and John returned to their base at High Road, Watford. John reported the incident to their manager, Dilip Sangit. John was sent to the doctor to have his back examined. Owain Jones was asked to complete an accident report form.

ACCIDENT REPORT FORM

Please print

Date of accident _____ Time of accident _____

Name of person involved _____

Status or job title if an employee _____
(e.g. employee, visitor, contractor)

Name and address of employer _____

Describe how the accident occurred and what injuries were sustained.

Form continued on page 18 ...

Name(s) of witness(es) to the accident _____

Signed _____

Please print name _____

Senior staff on duty at the time of the accident

Date _____

After this form has been completed it should be sent to the Personnel Department

CIB Claim Ref. _____

You will find the feedback to this activity on page 23.

Form filling checklist

Below is a list of points to help you check that you have completed your forms effectively. Use the list each time you fill in a form.

- Could someone else read it?
- Have I followed all the instructions?
- Have I answered every question?
- Is all the information correct?
- Have I put N/A if the question does not apply?
- Are my answers relevant?
- Have I made a copy of the completed form for reference?
- Have I checked it for errors?

If you can answer 'yes' to most of these questions then you are completing your forms correctly.

Key Learning Points

- Make sure that you read through your form after you have completed it.
- Ask someone to check your rough draft and then your completed form when you have finished.
- Try using the checklist in this section. If all your answers are 'yes' your form will be ready to send off or hand in.

FeedBack toActivities

FEEDBACK TO ACTIVITY 2

PERSONAL DETAILS	
Please write clearly in BLACK INK and CAPITAL LETTERS.	
SURNAME	DUTA
FIRST NAME(S)	RITA
ADDRESS	21 ACACIA AVENUE, BACKNALL, HERTS. SG1 2AJ
DATE OF BIRTH	21/05/80
SIGNED	 DATE 11/05/2007

FEEDBACK TO ACTIVITY 3

Word	Meaning
Referee	person who will provide information about applicant
Place of residence	Home address
Remuneration	salary or earnings
Maiden name	a woman's surname before marriage
Marital status	whether single, married, widowed, etc.
Employment	work
Previous	before or former
Location	place
Forename	first name or given name
Occupation	type of work
Qualifications	exams passed, certificates gained
Next of kin	nearest relative
Surname	family name

FEEDBACK TO ACTIVITY 4

Complete the following application form in BLOCK CAPITALS and black ink.

WESTFIELD BOROUGH COUNCIL	
Application for the post of	ADMINISTRATIVE ASSISTANT
at	RAYNES PARK LIBRARY

Form continued opposite ...

Surname MITCHELL
(Mr/Mrs/Miss/Ms) Delete where not applicable

Forenames RICHARD

Maiden name (where applicable) N/A

Date of birth 26/06/69

Address FLAT 3, ADDISON GROVE,
STEPTON, LONDON Postcode NW3 1DB

Telephone no. 0171 634 521

Details of any special training/apprenticeship, development, etc. with dates and qualifications held

GCSE ART, ENGLISH, FRENCH – GRADE C 1985

POST OFFICE TRAINEE 1985 – 1986

WORD COURSE – 6 WEEKS, MAY – JUNE 1998

Are you registered under the Disabled Persons Act? ~~YES~~/NO
If yes, please give registration number _____

Current and Previous Employment
Please give details of your current and previous employment. If you are not in paid employment, please give details of any voluntary or other activities you are involved in. Start with your current or most recent activity or employment. Use extra sheets if necessary.

Position and brief description of duties	Employer's name, address and telephone number and name of person to contact	Date commenced employment (From)	Date finished employment (To)
FILING CLERK – FILING, SETTING UP FILING SYSTEMS, DELIVERING INTERNAL POST	MASONS 6 WINSLOW ROAD STEPTON LONDON MR DUVALL 0171 396 041	SEPT 1986	TO PRESENT DATE
POST OFFICE TRAINEE – TRAINING IN COUNTER DUTIES	POST OFFICE 3 BUSHEY LANE STEPTON LONDON MR SINGH 0171 256 312	SEPT 1985	SEPT 1986

FeedBack toActivities

FEEDBACK TO ACTIVITY 5

APPLICATION FOR COMPUTER TRAINING	
Name:	STEPHANIE BOBBIT
Job title:	RECEPTIONIST
Section:	ADMINISTRATION
Extension number:	4097
Home address:	23 ELDORE ROAD, PAVENHAM, SUSSEX
Postcode:	SS4 2AN
Telephone number:	01245 716328
Date of birth:	31/9/65
State briefly the training you would like to do and why.	
I WOULD LIKE TO RECEIVE TRAINING IN WORD PROCESSING SO THAT I CAN HELP THE MARKETING SECTION WHEN THE RECEPTION AREA IS NOT BUSY.	
Describe briefly any training you have received.	
CUSTOMER CARE – 2 DAYS INTRODUCTION TO COMPUTERS – 1 DAY	
How would you like to study (e.g. in a group, self-study, one to one)?	
IN A GROUP OR ONE TO ONE.	
Is there any other information you would like to add?	

FEEDBACK TO ACTIVITY 6

SELF-CERTIFICATION FORM	
Please complete on your first day back at work: If you were absent because you were sick complete Section 1. If you were absent for any other reason (for example, family illness, domestic problems) complete Section 2.	
Employee name	JOHN BROWN (First name) (Surname)
Place of work	A1 COMPUTERS, WATFORD
1. Sickness	
My illness started on	TUESDAY the 15th of MAY 20 07 (Day) (Date) (Month)

Form continued opposite ...

and ended on THURSDAY the 17th of MAY 20 07
(Day) (Date) (Month)

I was therefore sick for a total of 3 days.

I suffered from BACK STRAIN

I have consulted a doctor Yes/No

A medical certificate is required for sickness lasting longer than 7 days.

2. Absence for other reasons

I was absent from work from _____ the _____ of _____ 19_____
(Day) (Date) (Month)

to _____ the _____ of _____ 19_____
(Day) (Date) (Month)

I was therefore absent for a total of _____ days.

My absence was due to _____

FEEDBACK TO ACTIVITY 7

ACCIDENT REPORT FORM

Please print

Date of accident 17/5/2007 Time of accident 9.30am

Name of person involved JOHN BROWN

Status or job title if an employee VAN DRIVER
(e.g. employee, visitor, contractor)

Name and address of employer A1 COMPUTERS

HIGH ROAD, WATFORD

Describe how the accident occurred and what injuries were sustained.

BACK STRAIN CAUSED THROUGH UNLOADING COMPUTER EQUIPMENT
FROM THE VAN.

Signed O Jones

Please print name OWAIN JONES

Senior staff on duty at the time of the accident OWAIN JONES

Date 18/5/2007

After this form has been completed it should be sent to the
Personnel Department. CIB Claim Ref. _____

Do you:
Get confused when someone asks you to complete a form?
Feel unclear about the sort of information that is needed?
Worry about your handwriting and ask someone else to do it for you?
Try to avoid completing the form altogether?

If you answered 'yes' to one or more of these questions, you will find that the activities in this booklet will help you with the following: Understand what sort of information is needed to complete the form. Provide examples of the most common workplace forms. Demonstrate how to set out your answers.

Workbase Training is a national specialist organisation for workforce learning and development. These booklets are based on work with over 20,000 employees within 120 organisations since 1980. Workbase is a not-for-profit charitable company, limited by guarantee, and is supported by the Confederation of British Industry and the Trades Union Congress and other unions.

The Campaign for Learning is a national charity seeking to create an appetite for learning in everyone. Its four areas of work are Workplace Learning & Skills, Family Learning, Learning to Learn and influencing policy. It co-ordinates Learning at Work Day and a Family Learning Festival each year. The Campaign is supported by the government, a wide range of businesses, local authorities, voluntary sector organisations and individuals.

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