

Interactive Form Design

Meals on Wheels Application

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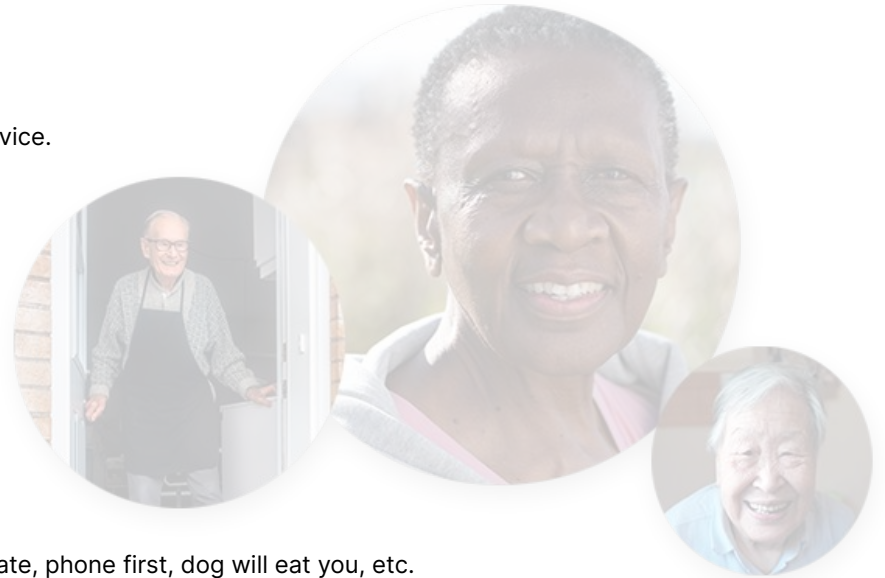


Background

Create a form that will allow town residents to apply for a meals-on-wheels service.

Required Fields

- Person being served
- Your name (if not same person)
- Age
- Disabled: Yes or No – If yes, then upload/provide documentation
- Services requested: The meal plan
 - Full 21 meals
 - Lunch and dinner
 - Only dinner
- Which days of the week
- Any additional information about accessing the property - ie., condo gate, phone first, dog will eat you, etc.
- Notification: how do we reach you



Research & Direction

Market research was conducted on several municipalities and non-profit Meals-on-Wheels websites to compare their application process.

Some registration processes were lengthy, with upwards of 20 steps and payment requirements upfront. Others were simple contact forms. Some websites didn't even have a signup process online and required either a phone call or going through a social program to start receiving free meals.

My focus was to keep the process as streamlined as possible. Make the form short and sweet, group like information and put more difficult information towards the end (a best practice.)

Flow 1 - Self Apply (Overview)

Starter/Screeners

Meal Delivery Sign-Up
 Screening Quiz available at: [Link]
 [Apply] [Screening Quiz]

User would be presented the option to apply for themselves or for someone else.

Step 1 - Basic Info

Meal Delivery Sign-Up
 Please tell us about yourself
 [Name] [Address] [City] [State] [Zip]
 [Go to Step 2]

Step 2 - Meal Plan

Meal Delivery Sign-Up
 What meal option are you interested in?
 Meal Frequency: [Dropdown]
 Dietary restrictions: [List]
 [Go to Step 3]

3 meal frequency options to choose from

21 Meal Option (Breakfast, Lunch & Dinner)

Lunch and Dinner Options with day selections

Dinners Only with day selections

Meal Delivery Sign-Up
 What meal option are you interested in?
 Meal Frequency: [Dropdown]
 Dietary restrictions: [List]
 [Go to Step 3]

Meal Delivery Sign-Up
 What meal option are you interested in?
 Meal Frequency: [Dropdown]
 Choose which days: [Calendar]
 Dietary restrictions: [List]
 [Go to Step 3]

Meal Delivery Sign-Up
 What meal option are you interested in?
 Meal Frequency: [Dropdown]
 Choose which days: [Calendar]
 Dietary restrictions: [List]
 [Go to Step 3]

Step 3 - Additional Details

Meal Delivery Sign-Up
 Just a few remaining questions
 [Complete sign up] [Need help?]

Meal Delivery Sign-Up
 Just a few remaining questions
 [Complete sign up] [Need help?]

Conditional: If disabled there is an option to upload documents. Or mail them in.

Confirmation

Thank you, [recipient name], for signing up!
 [Logo]
 [Contact Info]

Flow 1 - Self Apply (Details)

Desktop

Logo

Meal Delivery Sign-Up

Serving the east-side of Cleveland, OH.
Nutritious meals delivered Sunday - Saturday between 9:00 AM - 2:00 PM.

I am requesting meals for

or

Prefer to call?
1-800-XXX-XXXX

Footer

Mobile

Meal Delivery Sign-Up

Serving the east-side of Cleveland, OH.

Nutritious meals delivered Sunday - Saturday
between 9:00 AM - 2:00 PM.

I am requesting meals for

or

Prefer to call?
1-800-XXX-XXXX

0 - Starter application screen

Hierarchy of a detailed headline, information about the serviced area, and additional delivery details.

A user would be presented with the option to apply for themselves or someone else - with two different buttons to help distinguish options. Possible icons or images could be added to also help with this distinction as well.

Throughout this flow you'll notice, I gave the user the option to call if applying via website becomes to overwhelming or difficult.

Desktop

Meal Delivery Sign-Up

1 Request Info 2 Meal Options 3 Final Details

Please tell us about yourself

Full Name: Example: Jane Doe

Date of Birth: Format: MM/DD/YYYY

Address: Example: 123 Main St Apt. 1A

City:

State: Select one

Postal code: Example: 44104

Phone Number: Format: (XXX) XXX-XXXX

Do you want called before deliveries?
 Yes No

Need help?
Call us 1-800-XXX-XXXX

Footer

Mobile

Meal Delivery Sign-Up

1 Request Info 2 Meal Options 3 Final Details

Please tell us about yourself

Full Name: Example: Jane Doe

Date of Birth: Format: MM/DD/YYYY

Address: Example: 123 Main St Apt. 1A

City:

State: Select one

Postal code: Example: 44104

Phone Number: Format: (XXX) XXX-XXXX

Do you want called before deliveries?
 Yes No

Need help?
Call us 1-800-XXX-XXXX

Step 1 - Self-application

A simple 1-2-3 step progress bar alludes to a simple sign-up process.

User is asked to share information about themselves, with examples of the info that is being asked, like date of birth. With so many MOW programs out there, I thought it was important to verify that the user was applying to the correct outreach program in their area.

Users will confirm if they'd like to be called before receiving deliveries (how they'll be reached.)

Flow 1 - Self Apply (Cont.)

Desktop

The desktop version of the form features a top navigation bar with a logo on the left and five 'Nav' links on the right. A progress indicator at the top shows three steps: 1 (Recipient Info, checked), 2 (Meal Options, active), and 3 (Final Details). The main heading is 'Meal Delivery Sign-Up'. Below it, the question 'What meal option are you interested in?' is followed by a 'Meal frequency' dropdown menu with 'Select one' as the placeholder. Underneath, 'Dietary restrictions' are listed with checkboxes for Vegetarian, Gluten-Free, Lactose-Free, Renal, Diabetic-Friendly, and Low-Sodium. A blue 'Go to Step 3 >' button is at the bottom. A 'Need help? Call us 1-800-XXX-XXXX' link is positioned above a grey footer area.

Mobile

The mobile version has a back arrow at the top left. The progress indicator shows steps 1, 2, and 3. The heading is 'Meal Delivery Sign-Up'. The question 'What meal option are you interested in?' is followed by a 'Meal frequency' dropdown menu with 'Select one' as the placeholder. 'Dietary restrictions' are listed with checkboxes for Vegetarian, Gluten-Free, Lactose-Free, Renal, Diabetic-Friendly, and Low-Sodium. A blue 'Go to Step 3 >' button is at the bottom. A 'Need help? Call us 1-800-XXX-XXXX' link is at the bottom.

The mobile version has a back arrow at the top left. The progress indicator shows steps 1, 2, and 3. The heading is 'Meal Delivery Sign-Up'. The question 'What meal option are you interested in?' is followed by a 'Meal frequency' dropdown menu with '21 Full-Weekly Meals (All)' as the selected option. 'Dietary restrictions' are listed with checkboxes for Vegetarian, Gluten-Free, Lactose-Free, Renal, Diabetic-Friendly, and Low-Sodium. A blue 'Go to Step 3 >' button is at the bottom. A 'Need help? Call us 1-800-XXX-XXXX' link is at the bottom.

The mobile version has a back arrow at the top left. The progress indicator shows steps 1, 2, and 3. The heading is 'Meal Delivery Sign-Up'. The question 'What meal option are you interested in?' is followed by a 'Meal frequency' dropdown menu with 'Lunch & Dinners' as the selected option. Below it, 'Choose which days' is shown with a 'Minimum 1' requirement and a calendar grid with buttons for S, M, T, W, T, F, S. Below the calendar, it says '7 days a week selected - 14 meals total'. 'Dietary restrictions' are listed with checkboxes for Vegetarian, Gluten-Free, Lactose-Free, Renal, Diabetic-Friendly, and Low-Sodium. A blue 'Go to Step 3 >' button is at the bottom. A 'Need help? Call us 1-800-XXX-XXXX' link is at the bottom. A blue arrow points to the dropdown menu.

The mobile version has a back arrow at the top left. The progress indicator shows steps 1, 2, and 3. The heading is 'Meal Delivery Sign-Up'. The question 'What meal option are you interested in?' is followed by a 'Meal frequency' dropdown menu with 'Dinner's Only' as the selected option. Below it, 'Choose which days' is shown with a 'Minimum 1' requirement and a calendar grid with buttons for S, M, T, W, T, F, S. Below the calendar, it says '7 days a week selected - 7 meals total'. 'Dietary restrictions' are listed with checkboxes for Vegetarian, Gluten-Free, Lactose-Free, Renal, Diabetic-Friendly, and Low-Sodium. A blue 'Go to Step 3 >' button is at the bottom. A 'Need help? Call us 1-800-XXX-XXXX' link is at the bottom. A blue arrow points to the dropdown menu.

Step 2 - Meal Plan

In this step, the user is required to select meal frequency: 21 meals (3 meals, seven days a week), only lunch and dinner, or only dinners. Depending on their option, they'll also be asked to choose the days they want meals delivered, with a minimum of one day to select. They will not be asked to choose days for the 21-meal option, as that's a given that every meal will be provided, and this feature will be hidden or disabled.

I also thought it important to include dietary options since that is a huge focus for a large part of this demographic and often seen on many other Meals-on-Wheels websites.

Flow 1 - Self Apply (Cont.)

Desktop

The desktop view shows a three-step progress bar at the top: 1. Recipient Info, 2. Meal Options, and 3. Final Details. Below the progress bar, it says "Just a few remaining questions". The main question is "Are you disabled?" with radio buttons for "Yes" and "No". Below this is a section for "If possible, please attach proof of disability:" with a "Click here to attach or" link and a "Click here to upload" button. There is a list of "Acceptable forms of proof include:" with bullet points: "Statement from physician", "or Document of disability benefits", and "or Records Rehabilitation Agency". Below that is "OR please promptly mail a copy to:" followed by "Meals On Wheels, 123 Main St, Cleveland, OH 44123". Another section says "Helpful notes to assist your delivery driver (optional):" with a "Click here to attach or" link and a "Click here to upload" button. At the bottom, there is a "Need help? Call us 1-800-XXX-XXXX" link and a "Complete sign up" button.

Mobile

The mobile view shows a three-step progress bar at the top: 1. Recipient Info, 2. Meal Options, and 3. Final Details. Below the progress bar, it says "Just a few remaining questions". The main question is "Are you disabled?" with radio buttons for "Yes" and "No". Below this is a section for "Helpful notes to assist your delivery driver (optional):" with a "Click here to attach or" link and a "Click here to upload" button. There is a list of "Acceptable forms of proof include:" with bullet points: "Statement from physician", "or Document of disability benefits", and "or Records Rehabilitation Agency". Below that is "OR please promptly mail a copy to:" followed by "Meals On Wheels, 123 Main St, Cleveland, OH 44123". Another section says "Helpful notes to assist your delivery driver (optional):" with a "Click here to attach or" link and a "Click here to upload" button. At the bottom, there is a "Need help? Call us 1-800-XXX-XXXX" link and a "Complete sign up" button.

Desktop

The desktop view shows a confirmation message: "Thank you, [recipient name], for signing up!". Below this, it says "You'll receive a confirmation call from a Cleveland Meals-on-Wheels representative within 1-2 business days." and "Have questions or concerns in the meantime? Call us at 1-800-XXX-XXXX". At the bottom, there is a "Logo" and "Meals On Wheels, 123 Main St, Cleveland, OH 44123".

Mobile

The mobile view shows a confirmation message: "Thank you, [recipient name], for signing up!". Below this, it says "You'll receive a confirmation call from a Cleveland Meals-on-Wheels representative within 1-2 business days." and "Have questions or concerns in the meantime? Call us at 1-800-XXX-XXXX". At the bottom, there is a "Logo" and "Meals On Wheels, 123 Main St, Cleveland, OH 44123".

Step 3 - Additional Details

Uploading proof of a disability may prove to be a difficult task for some. Putting this towards the end and making it optional is a form "best practices" - easier information upfront; harder information towards the end.

Users have the option to mail in their documentation if that's a preferred method, rather than trying to locate a document on their phone or computer.

Additional property access notes felt like a "loose ends" type of thing to throw in towards the end of the form rather than front-load in the process.

Confirmation

Letting the user know their info was submitted with some added personalization.

Giving the user any additional information needed before the follow-up and also providing that address again for mailing documentation if they forgot to write it down or still need to submit any proof of disability.

Flow 2 - Caregiver Apply (Overview)

Starter/Screenner

Meal Delivery Sign-Up
 I am requesting meals for
 [Request]
 or
 [Skip to the End]

Using the term "caregiver" loosely. This could be anyone who is helping out someone in need.

Therefore I labeled the button in the flow as requesting for "someone else" so it's more broad.

Step 1 - Basic Info

Please provide us some information

Name: [Field]
 Phone: [Field]
 Address: [Field]
 Email: [Field]

Meal recipient's details
 Full Name: [Field]
 Address: [Field]
 City: [Field]
 State: [Field]
 Zip: [Field]
 Postal Code: [Field]

Need help?
 Call us 1-800-XXXX-XXXX

Minor changes. Step 1 includes form fields for person filling out the form.

Also, some additional contact options.

Step 2 - Meal Plan

Meal Delivery Sign-Up

What meal option are you interested in?

Meal frequency: [Dropdown]

Delivery preferences: [Form]

Need help?
 Call us 1-800-XXXX-XXXX

Overall functionality and simplicity will stay the same.

21 Meal Option (Breakfast, Lunch & Dinner)

Lunch and Dinner Options with day selections

Dinners Only with day selections

Meal Delivery Sign-Up

What meal option are you interested in?

Meal frequency: [Dropdown]

Delivery preferences: [Form]

Need help?
 Call us 1-800-XXXX-XXXX

Meal Delivery Sign-Up

What meal option are you interested in?

Meal frequency: [Dropdown]

Delivery preferences: [Form]

Need help?
 Call us 1-800-XXXX-XXXX

Meal Delivery Sign-Up

What meal option are you interested in?

Meal frequency: [Dropdown]

Delivery preferences: [Form]

Need help?
 Call us 1-800-XXXX-XXXX

Step 3 - Additional Details

Meal Delivery Sign-Up

Just a few remaining questions

Is your phone number correct?

Need help?
 Call us 1-800-XXXX-XXXX

Meal Delivery Sign-Up

Just a few remaining questions

Is your phone number correct?

Need help?
 Call us 1-800-XXXX-XXXX

Confirmation

Thank you for registering [recipient's name] for our program.

Need help?
 Call us 1-800-XXXX-XXXX

Slight wording changes in Step 3 and confirmations stages.

Flow 2 - Caregiver (Details)

Meal Delivery Sign-Up

1 Recipient Info 2 Meal Options 3 Final Details

Please provide us some information

Your Name: Example: Jane Doe

Phone Number: Format: XXX-XXX-XXXX

Do you want notified of deliveries?
 Call Text

Your relationship to recipient:

Meal recipient's details

Full Name: Example: Jane Doe

Date of Birth: Format: MM/DD/YYYY

Address: Example: 123 Main St Apt. 1a

City:

State: Select one

Postal code: Example: 44124

Phone Number: Format: XXX-XXX-XXXX

Should we call recipient before delivery?
 Yes No

Go to Step 2 >

Step 1 - Basic Info

In addition to the meal recipients' information, there are also added fields for the person who is filling out the form, be it a caregiver, family member, neighbor, etc. Their name, phone number, and relation to the recipient are required, and they are asked if they want to be notified when meals for the person they are applying.

Further down, the caregiver has the option to opt the recipient into calls for their meal delivery as well.

Meal Delivery Sign-Up

1 Recipient Info 2 Meal Options 3 Final Details

Just a few remaining questions

Is (recipient's name) disabled?
 Yes No

Helpful notes to assist your delivery driver (optional):
Gate or access code, beware of dog, doorbell is broken, landmarks to identify home, etc.

Complete sign up

Need help?
Call us 1-800-XXX-XXXX

Step 3 & Confirmation pages

Since the caregiver has given us the name of the recipient in step 1, the form will be able to provide a more personal tone in the questions and headlines.

An example placeholder is shown here of how it could work if someone's name was entered in the form earlier in step 1.

Thank you for registering
{recipient's name} for our program.

You'll receive a confirmation call from a Cleveland Meals-on-Wheels representative within 1-2 business days.

Have questions or concerns in the meantime?
Call us at 1-800-XXX-XXXX

Logo