

Name

Intake Form Testing Checklist (Paper or Digital)

Use this checklist to make sure your intake form works well, whether it's on paper or online. Test each part carefully before giving it to customers.

- Form is easy to read (clear font, size, and layout).
- All questions are clear and easy to understand.
- Only necessary information is requested (no extra or confusing questions).
- Form is organized in a logical order.
- If paper: Enough space is provided for answers.
- If digital: Fields work correctly (can be clicked or typed in).
- Required fields are marked clearly.
- Instructions are included if needed.
- Form fits on the page/screen without cutting off information.
- The contact information section is included.
- If digital: Form can be submitted without errors.
- If paper: Responses are easy to read and won't smudge.
- Confirmation process works (receipt, thank-you note, or copy of submission).
- Tested by at least two people before using with real customers.