

Instructions for Completing Fillable PDF Forms

Fillable PDF forms allow constituents to enter data directly into the form using their computer and **Adobe Reader**. Once completed, the form may be saved to a computer and submitted via the method of your choosing. Constituents are responsible for the completeness and accuracy of all information provided.

Downloading and Opening Fillable PDF Forms

Please review the following instructions for successfully downloading and opening fillable PDF forms found in Office 365.

- Avoid completing the form online within your web browser using a built-in PDF viewer, or by using MAC Preview (Macintosh OS). These features do not allow you to save the form with your data included.
 - Most default settings do not enable downloaded PDF documents to open directly in Adobe. Therefore, a downloaded PDF form may open directly in your web browser. Please utilize the following steps to ensure it is open in Adobe.

Scenario 1

1. Upon opening the document within o365, you will see options at the top left. Click **Download** (see *Figure 1*).

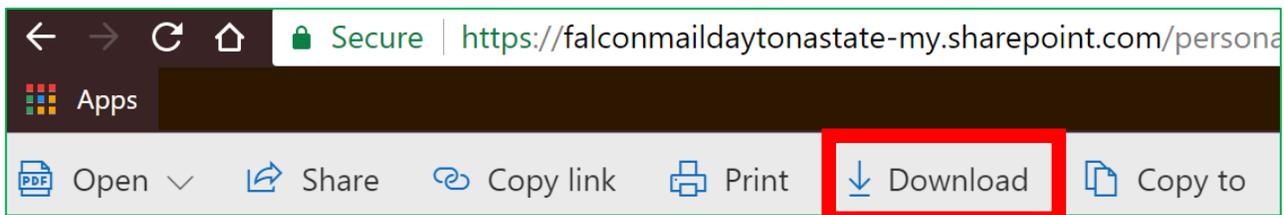


Figure 1

2. The document will now show at the bottom left of your browser window (see *Figure 2*). If this does not occur and the document opens in a new tab, please see Scenario 2 for instructions.
 - a. Click the **arrow to the right** of the document and click **Show in Folder (Mac – Show in Finder)**. See *Figure 2*.

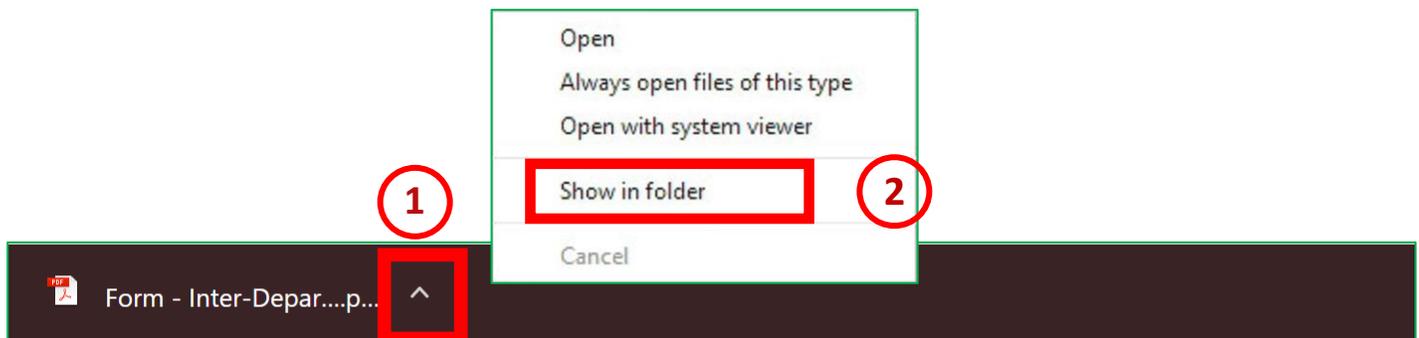


Figure 2

- i. This will open the Windows File Explorer to the Downloads folder. You should see the document at the top. **Double click** the document to open (it should open in Adobe – once open, be sure to look at the top of the screen to ensure you are not in a web browser or other program). See *Figure 3*.

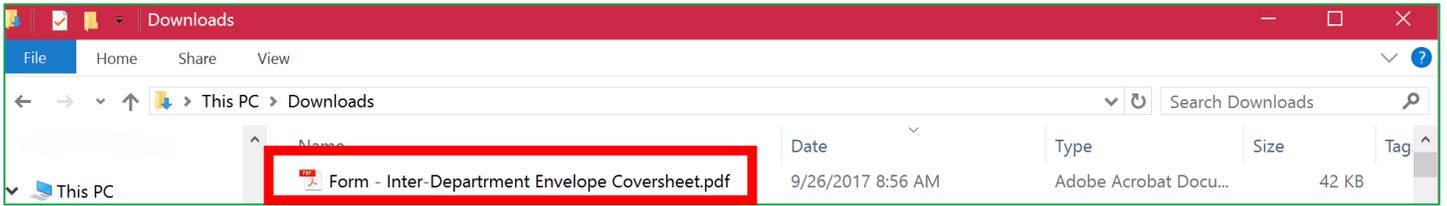


Figure 3

Scenario 2

1. Upon clicking the document within o365, it opens in a new tab. You have two options.
 - a. **Return to Document Repository tab, Right Click** the document, Click **Download**.
 - i. Then follow instruction 2 from Scenario 1 above.
 - b. **Right-click** the PDF (in the new tab) and select **Save as** or **Save Page As**. Make sure the **Save as type** is set to Adobe Acrobat Document (*.pdf). Note the name and location of the saved file (see *Figure 4*).

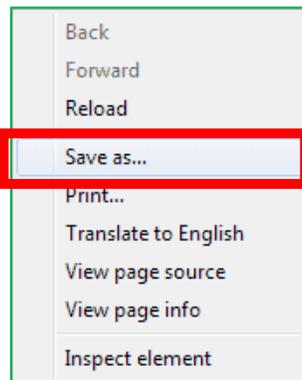


Figure 4

- i. **Open** Windows File Explorer.
 1. **Click** the Start/Windows button and then **click** File Explorer (See *Figure 5*).

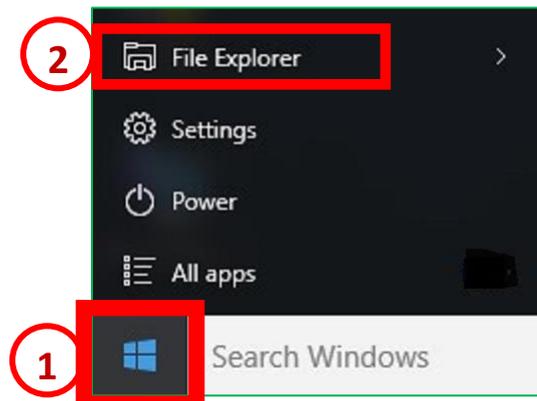


Figure 5

- ii. **Navigate** to the folder where you saved the file. Then **double click** the document to open (it should open in Adobe – once open, be sure to look at the top of the screen to ensure you are not in a web browser or other program). See *Figure 3 above*.

Filling out PDF Forms

Once you have saved the form to your computer and opened it in Adobe, you are ready to complete the form. Please be advised that the fillable PDF forms will not automatically save. It is strongly recommended that you periodically save data entered into a form by using the Save button on the form, or by clicking **File, Save** (or **Save As**) on the Adobe menu bar.

Things to Keep in Mind

1. Fillable forms are *interactive*, they contain fields that you can select or fill in.
2. In most forms, text fields are dynamic. This means that the text automatically resizes to accommodate the amount of data you enter and can span across the text boxes.
3. Form fields appear with a colored background (light blue by default).
4. The pointer changes to a different icon as you move it over a field. For example, the Hand  tool changes to an I-beam  when you can type text into the form field.
5. Click the field to select options, such as check boxes and radio buttons. Click inside a text box to add text.
6. Some fields have specific format requirements (i.e. must be numerical, have a specific date format). Hovering over the field may provide a tip to help you with special format requirements.
7. When filling out the form, press Tab to move to the next question or Shift Tab to move backward throughout the form.
8. After you have completed the form, ensure you **save** the final version of the file to your computer.

Signing PDF Forms

Fillable PDF forms do not allow you to drag and drop saved information, such as a signature. However, you can sign using a Digital ID. This can be completed using Adobe Reader or Adobe DC. Below you will find instructions on creating a new Digital ID and signing with your existing ID.

Creating a New Digital ID

There are several steps here and it may take few minutes. You will only have to create the new digital ID **ONCE** and then you can use it as often as needed.

1. When you come to where your signature is needed, **click** on the signature field and a new window will appear.
2. A *Sign with Digital ID* pop up window will appear. **Select** Configure New Digital ID.
3. **Select** Create a New Digital ID.
4. Next, you will need to **select** where you want your new signature to be stored. You can either store it as a file on your computer or in the Windows Certificate store. Both are password protected, and cannot be accessed by other people.
 - a. Use the file option if you need to copy this signature to a second computer.
 - b. Make sure to record the password in a safe place.
5. Upon **clicking** Continue, you will **fill in the form** that appears then **click** finish.
6. The *Sign with Digital ID* pop-up window reappears and allows you to choose your Digital ID you wish to use. **Select** the appropriate ID and click Continue. **Enter your password** and **click** Sign.
7. You will be prompted to **save the file** (you can change the file name if you wish). Then you will see your digital signature in the document.
8. Your document has now been successfully signed and time stamped.
9. Remember, if you have made any further changes, **save** the document.

Signing with an Existing Digital ID

1. When you come to where your signature is needed, **click** on the signature field and a new window will appear.
2. A *Sign with Digital ID* pop-up window will appear. **Select** the digital identity you want to use to sign this document and click Continue.
 - a. Adobe can store multiple digital identities for you. Pick the appropriate one from the list or create a new one (see Creating a New digital ID above).
3. You will need to **enter your password** in the bottom left of the pop-up window then **click** Sign.
4. You will be prompted to **save the file** (you can change the file name if you wish). Upon saving, you will see your digital signature in the document.
5. Your document has now been successfully signed and time stamped.
6. Remember, if you have made any further changes, **save the document**.

E-mailing Completed Fillable PDF Forms

After you have completed the form and saved the final version, send it to the next signatory. This should continue through each signatory level.