



**PROGRAM MATERIALS**

**Program #3189**

**May 25, 2021**

## **How to Create Adobe Acrobat Forms Your Clients Will Love to Use**

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# Creating, Modifying, and Working with Forms in Adobe Acrobat DC

Presented by:

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# About Daniel J. Siegel, Esquire



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# Coming in Spring 2021

- **290 All-New Screenshots**
- **Fully Revised to Include Acrobat's Newest Features**
- **Includes Windows & Mac Commands**



2<sup>nd</sup> Edition  
For PC & Mac

## The **Ultimate** Guide to Adobe® Acrobat® DC

By Daniel J. Siegel  
& Pamela A. Myers

# Acrobat Forms

Every law office uses forms.

Forms are useful for obtaining information.

The problem with forms is that many offices still open a form, print it out, and then fill it in either by hand or by typing the necessary information.

# Acrobat Forms

Adobe Acrobat allows you to create fillable forms from existing PDF documents.

Adobe Acrobat eliminates the hassle of forms by allowing users to transform virtually any document into a form that can be filled out or into a form that can be used over and over.

# Acrobat Forms

By converting a static form into one with fillable form fields, you can avoid typing all of the firm and attorney information every time, and save time in the process.

Static forms could originate from an outside source, from a Word document, or even from inside Acrobat.

# Why Do You Need This Program?

**“You fixed the text boxes so they don’t just go in one long line. Thank you thank you thank you!”**

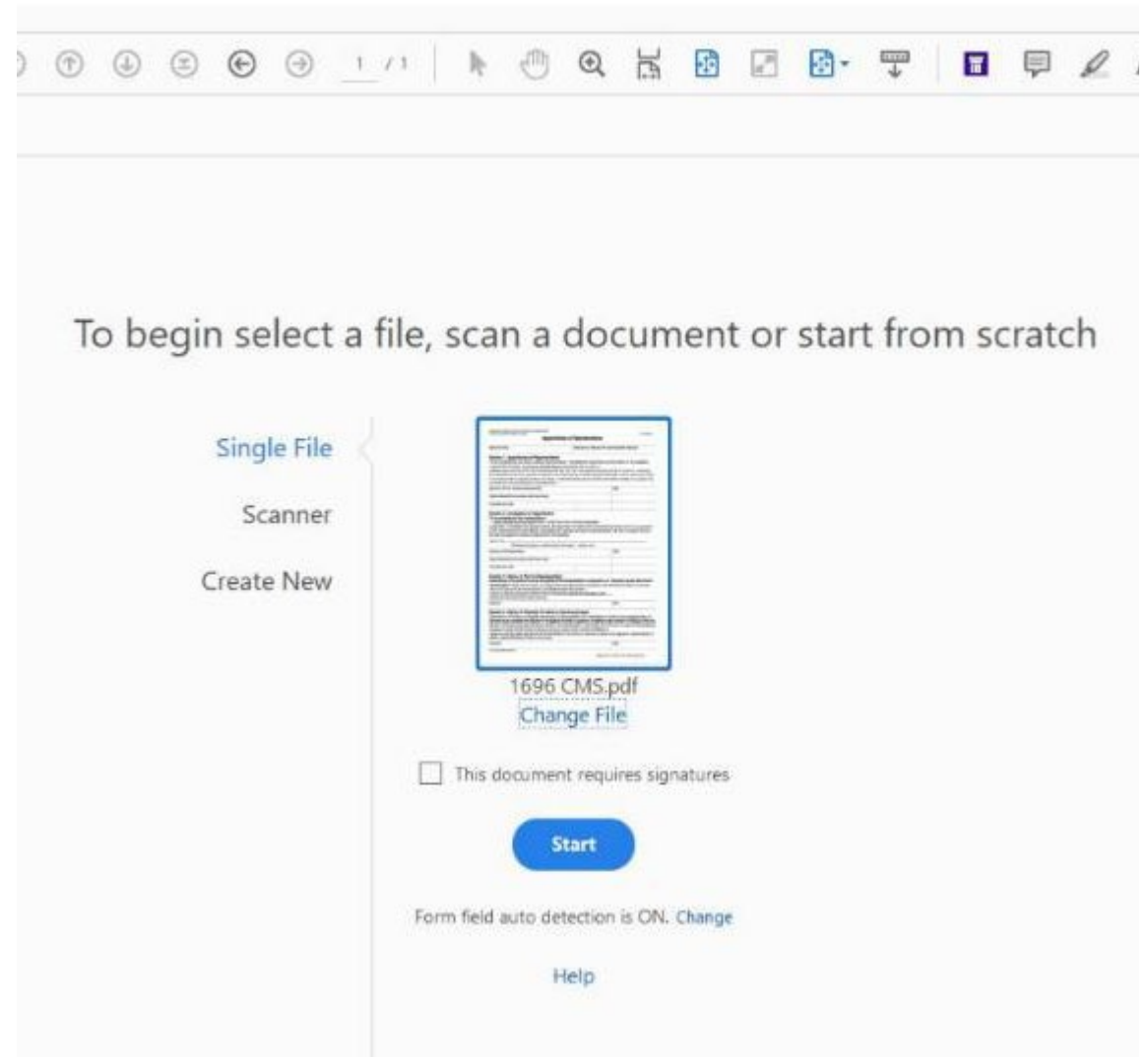
***Email to Dan***



# Converting PDF Files to Interactive Forms

You can convert any type of PDF into a fillable form. First, open your PDF file and from the Tools pane, select Prepare Form.

- Acrobat will offer three options: Single File, Scanner or Create New.
- Generally, Acrobat displays the document you are working on and its name above the Change File option.
- If this is the correct document, click Start. If you select Change File, you can use Windows File Explorer or Mac Finder to browse and locate the file you want to convert into a form. When the correct document is displayed, click Start.
- If you select "Scanner," the Start button becomes a Scanner interface appears. Once you scan a document, Acrobat will begin the process of creating a form. Finally, "Create New" will open a new blank document, which can be used to create a form "from scratch."



# Converting PDF Files to Interactive Forms

**Note:** We recommend scanning and saving any paper documents you want to convert into a form before attempting to create a fillable form. This will allow you to create the form and then work with it, discarding any changes if you discover that you need to start over.

After you select Start, Acrobat will analyze the document and add form fields where it feels they are appropriate based on the text of the document and its analysis of locations with blank lines.

**Note:** This autodetection is set by default. You can check this default setting, and change other settings, by modifying Forms preferences in Edit>Preferences>Forms for Windows or Acrobat Pro DC>Preferences for Mac.

# Converting PDF Files to Interactive Forms

The Prepare Form toolbar appears above your document, and the Forms pane will display to the right. The Prepare Form toolbar contains the tools for creating different types of fields, the Pin tool, a Help button, and a Preview button, which allows you to view the form as it will display to an end-user and then easily go back into Edit mode.

- The Forms pane displays a list of the fields that Acrobat has added. Adjacent to the FIELDS title are two dropdown menus. The right dropdown sorts your tabs (form fields) alphabetically or in tab order. The left dropdown menu is the Reading Order tool, which allows you to specify in what order a user will go as they move between tabs. If you enable Show Tab Numbers, it may be easier to arrange tabs as you edit the document. You can sort (Order) the tabs (form fields) to make it easier for the end-user by Structure, by Row or by Column.

The screenshot shows the Adobe Acrobat interface. At the top, the 'Prepare Form' toolbar is visible, containing icons for creating various field types (text, checkboxes, radio buttons, etc.), a Pin tool, a Help button, and a Preview button. Below the toolbar, a sample form titled 'Appointment of Representative' is displayed. The form includes sections for 'Appointment of Representative', 'Section 1: Appointment of Representative', 'Section 2: Acceptance of Appointment', 'Section 3: Waiver of Fee for Representation', and 'Section 4: Waiver of Payment for Items or Services at Issue'. Each section contains text instructions and form fields for user input. A red line points from the 'Preview' button in the toolbar to the form, indicating the action to view the form as it will appear to an end-user.

# Converting PDF Files to Interactive Forms

When you review the document and the form fields that Acrobat has inserted, you will likely note that Acrobat has inserted fields where you do not need them or has not inserted them where you do. You can manually add form fields by using the tools on the Prepare Form toolbar or by right-clicking on the document and choosing one of the field types from the menu. You can easily delete fields by selecting the field and pressing the Delete key or by right-clicking on a field and choosing Delete.

- **NOTE:** If a document has been password protected to prevent editing, or Reader-Enabled, you will not be able to add or modify the existing fields.

DocPreviewer Window Help

Department of Health and Human Services Form Approved (288)  
Centers for Medicare & Medicaid Services

**Appointment of Representative**

Name of Party \_\_\_\_\_ Medicare or National Provider Identifier Number \_\_\_\_\_  
Address \_\_\_\_\_  
City State Zip Code \_\_\_\_\_

**Section 1: Appointment of Representative**  
To be completed by the party seeking representation (i.e., the Medicare beneficiary, the provider or the supplier):  
I appoint this individual, \_\_\_\_\_, to act as my representative in connection with my claim or asserted right under title XVIII of the Social Security Act (the "Act") and related provisions of title XI of the Act. I authorize this individual to make any request; to present or to elicit evidence; to obtain appropriate information; and to receive any notice in connection with my appeal, wholly in my stead. I understand that personal medical information related to my appeal may be disclosed to the representative indicated below.

Signature of Party Seeking Representation \_\_\_\_\_ Date \_\_\_\_\_

Street Address/Phone Number (with Area Code) \_\_\_\_\_  
City State Zip Code \_\_\_\_\_

**Section 2: Acceptance of Appointment**  
To be completed by the representative:  
I, \_\_\_\_\_, hereby accept the above appointment. I certify that I have not been disqualified, suspended, or prohibited from practice before the department of Health and Human Services; that I am not, as a current or former employee of the United States, disqualified from acting as the party's representative; and that I recognize that any fee may be subject to review and approval by the Secretary.

I am a / an \_\_\_\_\_  
(Professional status or relationship to the party, relative, etc.)

Signature of Representative \_\_\_\_\_ Date \_\_\_\_\_

Street Address/Phone Number (with Area Code) \_\_\_\_\_  
City State Zip Code \_\_\_\_\_

**Section 3: Waiver of Fee for Representation**  
Instructions: This section must be completed if the representative is required to, or chooses to waive their fee for representation. (Note that providers or suppliers that are representing a beneficiary and furnished the items or services may not charge a fee for representation and must complete this section.)  
I waive my right to charge and collect a fee for representing before the Secretary of the \_\_\_\_\_  
Department of Health and Human Services.

Signature \_\_\_\_\_ Date \_\_\_\_\_

**Section 4: Waiver of Payment for Items or Services at Issue**  
Instructions: Providers or suppliers serving as a representative for a beneficiary to whom they provided items or services must complete this section if the appeal involves a question of liability under section 1879(a)(2) of the Act. (Section 1879(a)(2) generally addresses whether a provider/supplier or beneficiary did not know, or could not reasonably be expected to know, that the items or services at issue would not be covered by Medicare.)  
I waive my right to collect payment from the beneficiary for the items or services at issue in this appeal if a determination of liability under §1879(a)(2) of the Act is at issue.

Signature \_\_\_\_\_ Date \_\_\_\_\_

Form CMS-1005-Rev (07/12)

H0000\_2017\_10718\_P14P\_CMS 1005-ACR

# Types of Form Fields

**Edit Text & Images:** This allows editing of text and images.

**Add Text:** This tool allows you to add text directly to the file.

**Text Field:** This tool allows users to type alphabetic or numeric characters.

**Check Box:** This tool presents choices for the user; multiple check boxes can be selected if the form allows it.

**Radio Button:** This tool presents choices for the user; only one radio button can be selected (for example, to choose yes or no).

**List Box:** This tool displays a list of options a user can select; you can enable a user to select multiple items from the list.

**Dropdown List:** This tool allows a user to choose an item from a pop-up menu.

**Button:** These action buttons allow a user to perform functions such as to Print, Reset, or Submit a form. They can also be used to perform other actions, such as moving the user to a specific page, opening a file, or opening a web page.

**Image Field:** The image field allows the user to select an image to upload and include in the document.

**Add a Date Field:** The Add a Date Field is the same as a Text Field that requires the user to input a date in a specific format, without the extra steps.

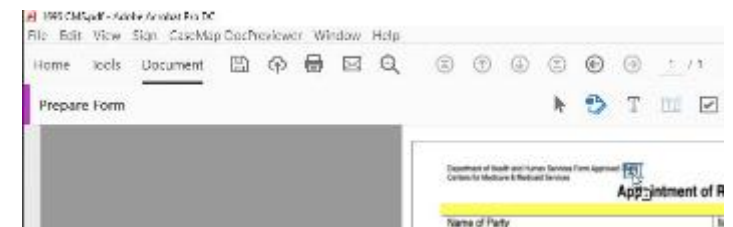
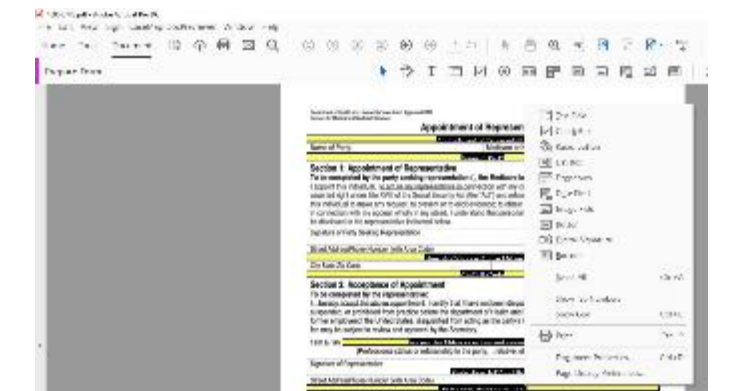
**Digital Signature:** This tool allows a user to digitally sign a document.

**Barcode Field:** This tool encodes the data that is inputted on a form and creates a barcode. This field is not likely to be used by attorneys and will not be discussed in this book.

# Using Text Fields

Most legal professionals will use text fields in every document. Learning how to create and modify them is crucial to creating documents that not only look good but are also user-friendly.

- To add a text field, choose the Text Field button from the Prepare Form toolbar or right-click on the document and choose Text Field from the menu. Place your cursor on the page where you wish the field to appear and left-click. A box will appear that will prompt you to add a Field Name. A default name such as "Text1" will appear in the box. You should not keep this default name, but rather, add a descriptive, meaningful name for the field.





# Using Text Fields

- **NOTE:** If fields have the same name, when users type into the field, the text they type will populate in the other fields with the same name. This can be useful if the form has areas where text needs to be repeated (such as a name, address, birthdate, etc.) but you may not want data to reappear. Be careful when naming your fields to choose unique names that are not already in use in the document.

The screenshot shows the 'Text Field Properties' dialog box with the 'Validate' tab selected. The 'Name' field is set to 'Text1' and the 'Tooltip' field is empty. The 'Common Properties' section includes a 'Form Field' dropdown set to 'Visible', an 'Orientation' dropdown set to '0' degrees, and checkboxes for 'Read Only' and 'Required', both of which are unchecked. A 'Locked' checkbox is also present and unchecked. A 'Close' button is located at the bottom right. At the very bottom of the dialog, there is a small text label: 'for representation and must complete this section.'

Text Field Properties

General Appearance Position Options Actions Format **Validate** Calculate

Name: Text1

Tooltip:

Common Properties

Form Field: Visible

Orientation: 0 degrees

☐ Read Only

☐ Required

☐ Locked

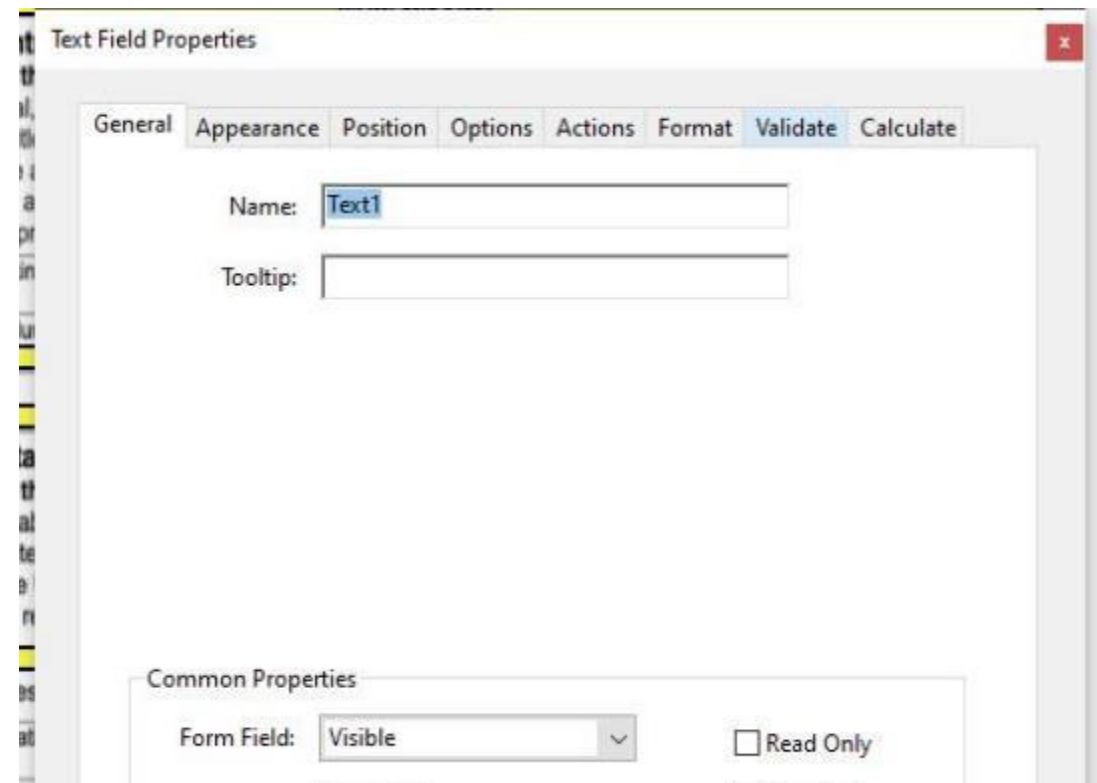
Close

for representation and must complete this section.

# Using Text Fields

## NOTE:

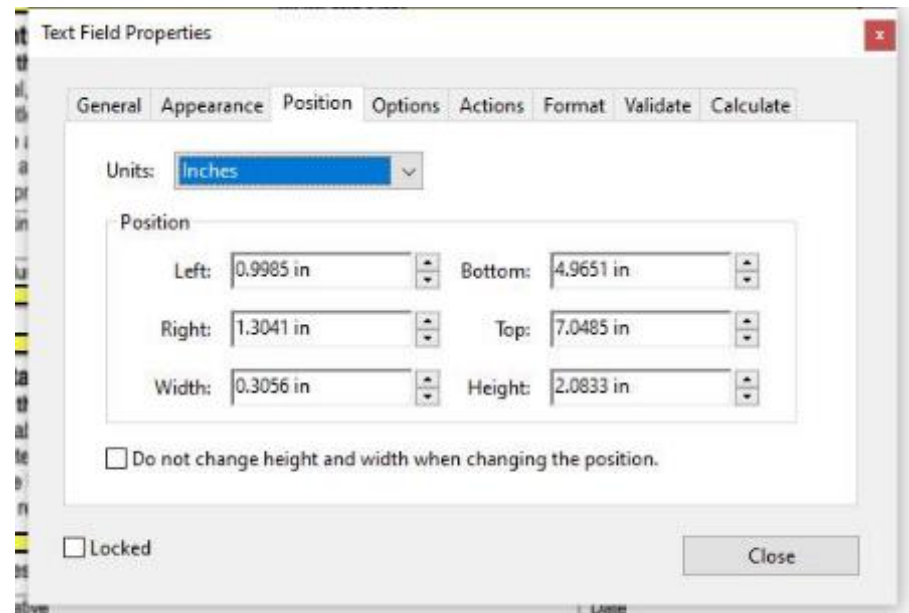
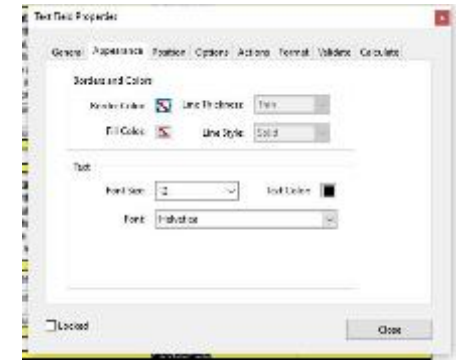
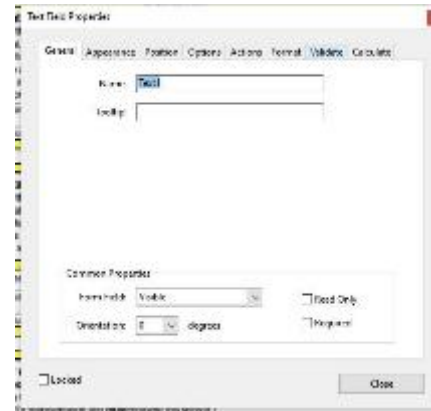
- If you check the box for “Required field,” the user must fill in the field.
- If the field is not properly sized, you can drag the handles on the field to the correct size.
- You can open the Text Field Properties box by double-clicking on the field or by right-clicking and choosing Properties. There are eight tabs that contain various properties that you can modify.





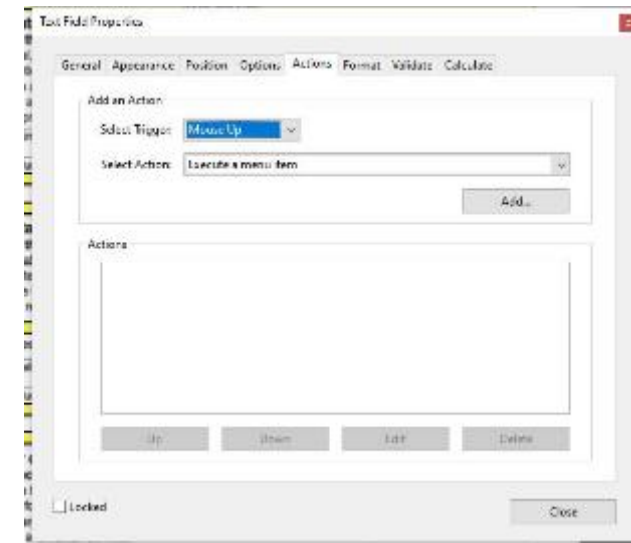
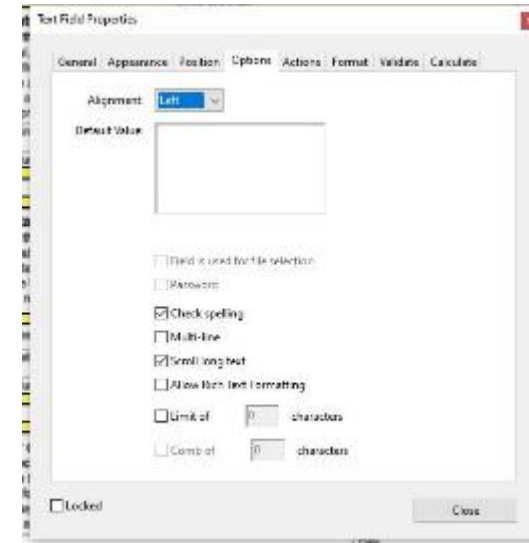
# Using Text Fields

- **General Tab:** This tab displays the current name of the field, a Tooltip box, and options for whether to make the field Read Only or Required, whether the field should be visible either in screen or in print, and to rotate the field. Making a form field required will not allow a user to submit a form without adding information to the field. Adding text to the Tooltip will display text over the field when a user's mouse pointer hovers over it. This device aids a user in knowing exactly what information, and in what format, should be typed in the box.
- **Appearance Tab:** This tab determines whether the field has a border or a fill color, the properties of the border such as color and thickness, and in which font and font size the text a user types will display.
- **Position Tab:** This tab determines the placement of the field on the page in terms of inches, points, etc. This property can be used to ensure that your fields are aligned or that they are in the same position as other text on the page.



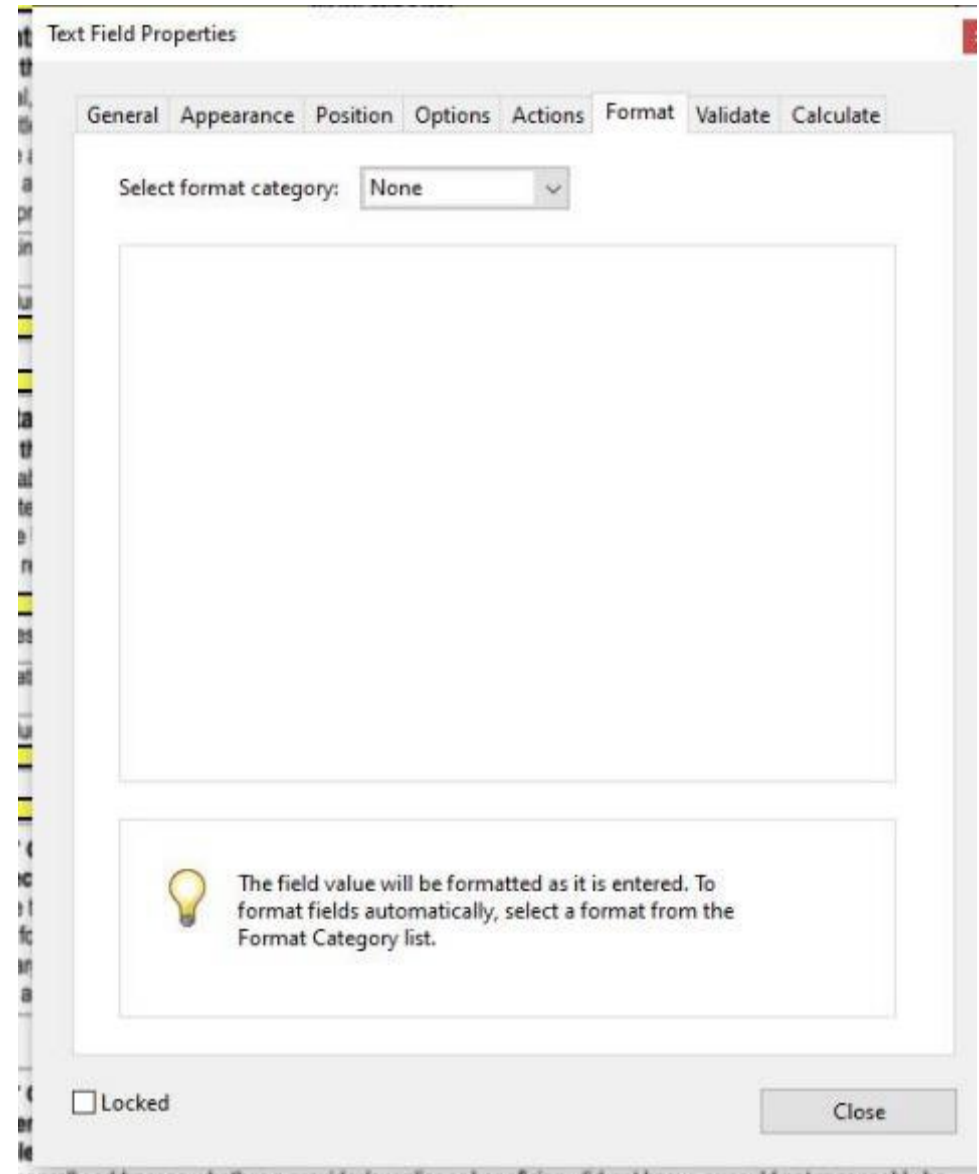
# Using Text Fields

- **Options Tab:** This tab determines the alignment (Left, Center, Right) of the text a user types as well as whether the text is spell checked. You can limit the number of characters that can be typed and allow for multiline or scrolling of long text. The multiline option allows users to type hard returns in their text. Scrolling will allow a user to type a long string of text but will not allow for hard returns. If a user types a string of text that exceeds the box, the text that exceeds the field's dimensions will not be visible in the field. By checking the box to Allow Rich Text Formatting, you can enable your users to add formatting such as bold or italics to their text.
- **Actions Tab:** This tab allows you to associate actions with the form field such as moving the user to a specific page, opening a file, or opening a web page. You can also use an action to submit the form when the user completes the final field. To add an action, you choose the trigger (Mouse Down is a click, Mouse Up is releasing after a click, Mouse Enter is moving the pointer over the button, and Mouse Exit is moving the pointer away from the button) and then use the Add button to add the desired action. Although you can use this feature with a text field, it is more commonly used when inserting an action button.



# Using Text Fields

- **Format Tab:** This tab automatically formats the information a user enters in a specific way.
  - None: This option applies no formatting.
  - Number: This option provides number formatting options similar to those found in Microsoft Excel for decimal places, separators such as commas and periods, currency symbols and locations of those symbols, and negative number style (with or without parentheses or red text).
  - Percentage: This option provides formatting options for decimal places and separators such as commas and periods.
  - Date: This option provides formatting options for various date styles, such as m/d, mm/dd/yy, or yyyy-mm-dd. You can also use a style that combines date and time if you need to display both.
  - Time: This option provides formatting options for various time styles, such as HH:MM or h:MM:ss tt (where tt is the a.m. or p.m. indicator). If you need to combine date and time, you should use the Date formatting option.
  - Special: This option provides formatting options for Zip Code, Zip Code +4, Phone Number, and Social Security Number.
  - Custom: This option provides further options using JavaScripts. Most lawyers will not need this option.



The screenshot shows the 'Text Field Properties' dialog box with the 'Format' tab selected. The 'Select format category:' dropdown menu is set to 'None'. Below the dropdown is a large empty text area. At the bottom of the dialog, there is a 'Locked' checkbox (which is unchecked) and a 'Close' button. A lightbulb icon with a message box is also present, stating: 'The field value will be formatted as it is entered. To format fields automatically, select a format from the Format Category list.'

# Using Text Fields

- **Validate Tab:** This tab restricts entry in a text field to specified ranges, values, or characters. If you choose to use a number or percentage format, for example, on the Format tab, you can limit the entry to numbers within a certain range. The option to limit the range is grayed out when it does not apply to your Format style.
- **Calculate Tab:** This tab performs mathematical operations on field entries and displays the result. You can easily display the sum of the value of various fields, or the product of various fields. This can be used for expense reimbursement forms where you can easily calculate the amount to be reimbursed by multiplying a predefined mileage rate by the number of miles a user inserts in a form.

The screenshot shows the 'Text Field Properties' dialog box with the 'Validate' tab selected. The 'General' tab is also visible. The 'Validate' tab contains three radio button options: 'Field value is not validated' (selected), 'Field value is in range:', and 'Run custom validation script:'. The 'Field value is in range:' option has 'From:' and 'To:' input fields. The 'Run custom validation script:' option has a large text area and an 'Edit...' button.

The screenshot shows the 'Text Field Properties' dialog box with the 'Calculate' tab selected. The 'General' tab is also visible. The 'Calculate' tab contains three radio button options: 'Value is not calculated' (selected), 'Value is the sum (+) of the following fields:', and 'Simplified field notation:'. The 'Value is the sum (+) of the following fields:' option has a text area and a 'Pick...' button. The 'Simplified field notation:' option has a text area and an 'Edit...' button. The 'Custom calculation script:' option has a text area and an 'Edit...' button.

# Adding Digital Signatures to a Form

- A digital signature (not to be confused with a digital certificate) is a method of validating the authenticity of a PDF or other document, that is, assuring the recipient that the document is valid and has not been tampered with. It also demonstrates that the sender has approved the contents of the document. The term “digital signatures” as discussed here does *not* mean the insertion of a jpg or other image of your scanned signature into a document, which essentially is no different than inserting any other image into a PDF and reflects no level of security or authenticity.

# Adding Digital Signatures to a Form

To add a Digital Signature field, choose the Digital Signature button from the Prepare Form toolbar or right-click on the document and choose Digital Signature from the menu. Place your cursor on the page where you wish the field to appear and left-click. It will prompt you to add a Field Name. A default name such as “Signature1” will appear in the box. You should not keep this default name, but rather, add a descriptive, meaningful name for the field.

If you check the box for Required Field, this field will have to be completed by the user for the form to be complete.

# Adding Digital Signatures to a Form

- You can open the Digital Signature Properties box by double-clicking on the field or by right-clicking and choosing Properties. There are five tabs that contain various properties that you can modify. Because many of the property tabs are similar to those displayed earlier in this Chapter, only those unique to these fields are displayed.
  - **General Tab:** This tab displays the current name of the field, a Tooltip box, and options for whether to make the field Read Only or Required, whether the field should be visible either in screen or in print, and to rotate the field. Making a form field required will not allow a user to submit a form without adding information to the field. Adding text to the Tooltip will display text over the field when a user's mouse pointer hovers over it. This device aids a user in knowing exactly what information, and in what format, should be typed in the box.
  - **Appearance Tab:** This tab determines whether the field has a border or a fill color, the properties of the border such as color and thickness, and in which font and font size the text a user types will display.
  - **Position Tab:** This tab determines the placement of the field on the page in terms of inches, points, etc. This property can be used to ensure that your fields are aligned or that they are in the same position as other text on the page.



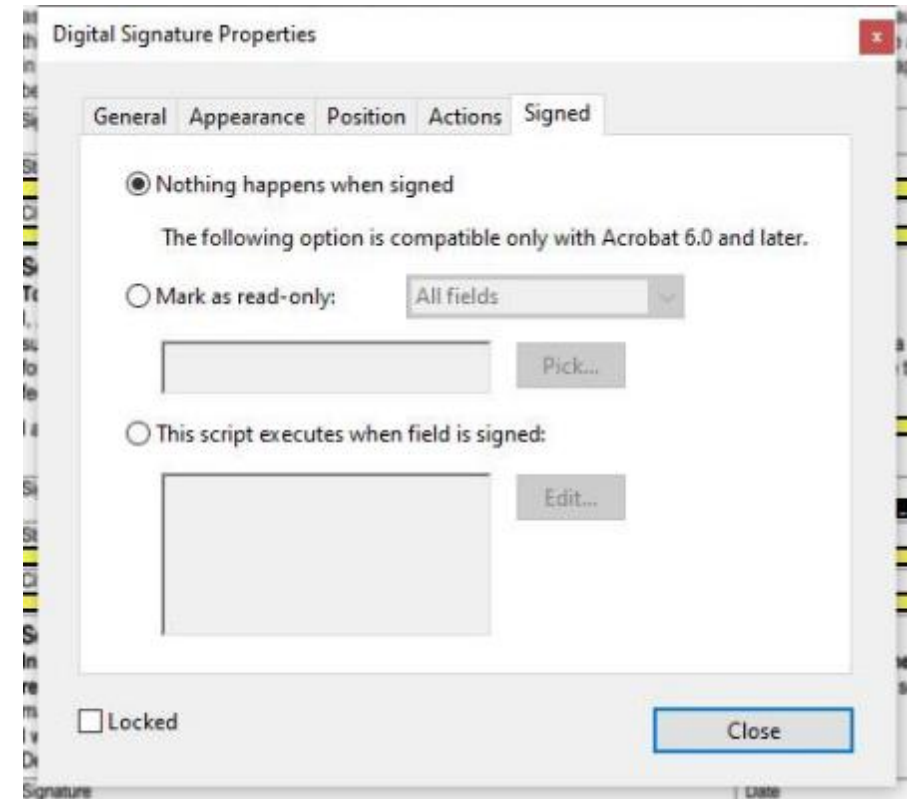
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  - **Actions Tab:** This tab allows you to associate actions with the form field such as moving the user to a specific page, opening a file, or opening a web page. You can also use an action to submit the form when the user completes the final field. To add an action, you choose the trigger (Mouse Down is a click, Mouse Up is releasing after a click, Mouse Enter is moving the pointer over the button, and Mouse Exit is moving the pointer away from the button) and then use the Add button to add the desired action. For example, you may want to use a “Submit” button so that the user can automatically submit (return) the document to you by email.



# Adding Digital Signatures to a Form

- You can open the Digital Signature Properties box by double-clicking on the field or by right-clicking and choosing Properties. There are five tabs that contain various properties that you can modify. Because many of the property tabs are similar to those displayed earlier in this Chapter, only those unique to these fields are displayed.
  - **Signed Tab:** This tab determines what happens when the document is signed by a user. The default is Nothing happens when signed, but you can choose other options to mark the document as read-only or to execute a script.
  - **Locked Button:** This choice appears on the bottom of each tab. If you check this box, the form field properties cannot be changed. Checking the box on one tab locks the options on all of the other tabs. If you need to make changes to the field properties, simply uncheck the box.
    - You can change the properties of multiple fields at one time by Ctrl-clicking or Cmd-clicking on the fields, right-clicking on one field, and choosing Properties. Note that depending on the properties of the fields you select (the type of field, etc.), all of the options will not be available.





# Additional Options for Modifying Fields through Right-Clicking

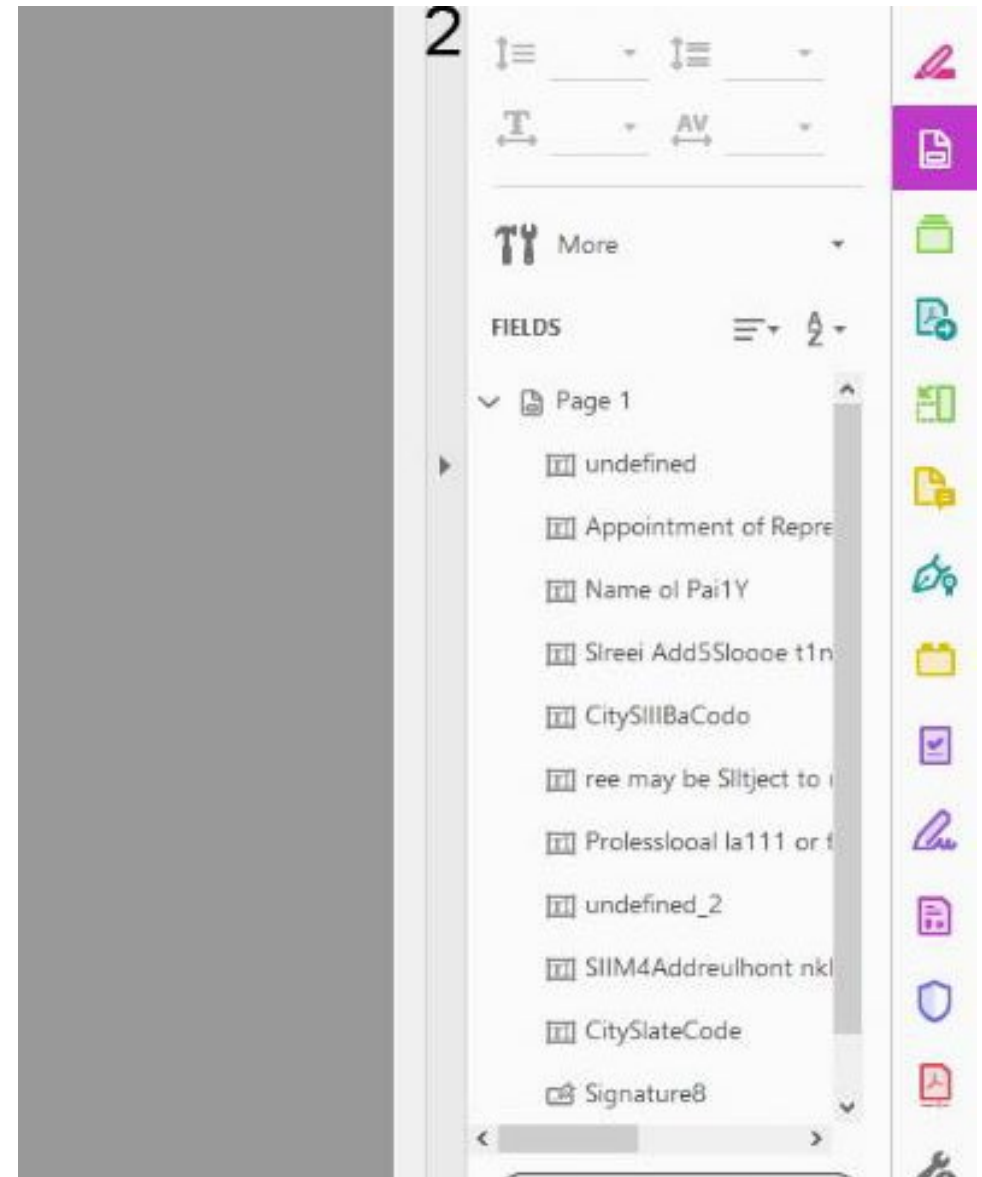
- You can modify the field's properties or add a new field by using the tools for each field type, but also by right-clicking on a field. Right-clicking provides quick options for accessing the Properties, Rename Field, Set as Required Field, or Add New Field options, as well as copying or deleting fields. There is also an option to Use Current Properties as New Defaults. If you modify properties for a specific type of form field such as a Check Box, and then choose the option to Use Current Properties as New Defaults, those properties will be saved as the defaults for any new fields of that type you insert in the form.

**NOTE:** Changing default properties will not change the settings for existing form fields, only new ones.

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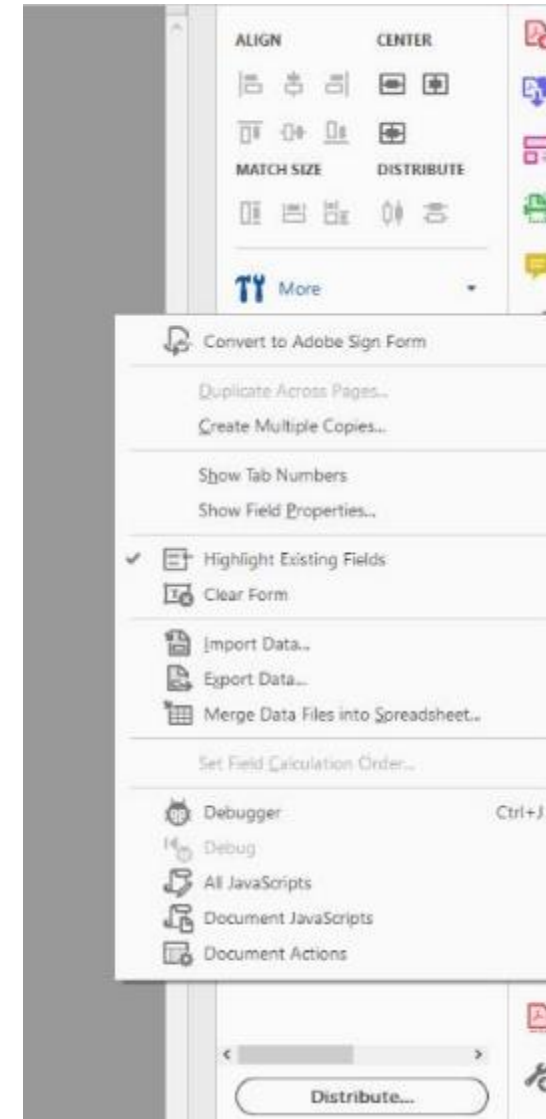
# The Forms Pane

- The Forms pane allows you to navigate easily through the fields that are on the page and reorder them. It also provides additional tools that allow you to format the fields on the page.
- Aligning and Centering Multiple Fields: **[1]** You can align a column of fields on a page left, right, or vertically. You can align a row of fields on a page by the top, bottom, or horizontally. Additionally, you can center the fields vertically, horizontally, or both.
- Adjusting Spacing between Form Fields: **[2]** You can use the Distribute command in the Forms pane to give a group of fields uniform spacing measuring from the centers of the fields. To distribute fields evenly between the topmost and bottommost fields, choose Distribute Vertically. To distribute fields evenly between the leftmost and rightmost fields, choose Distribute Horizontally.



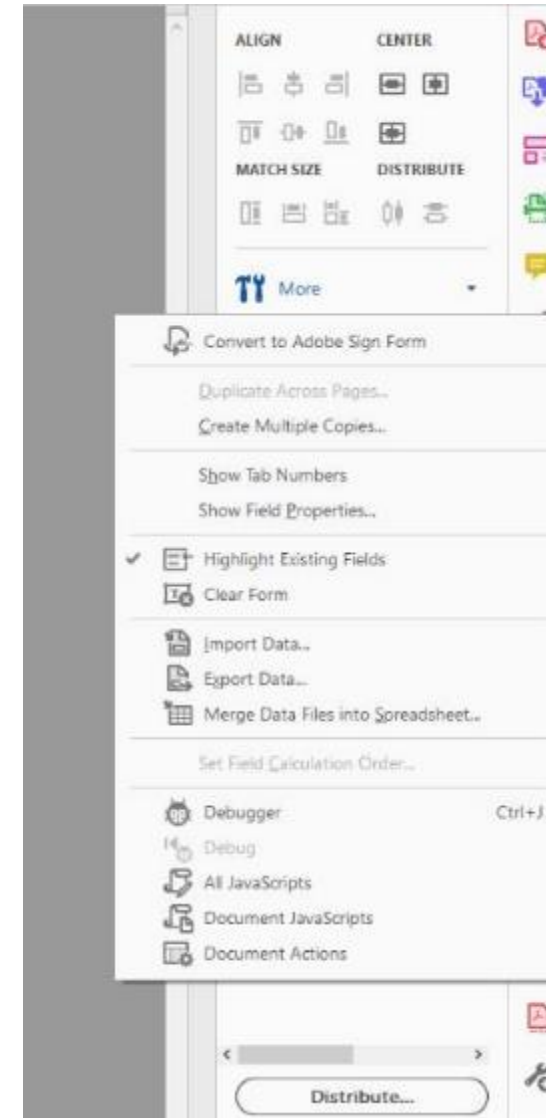
# The Forms Pane

- Other tools are available to you when creating or modifying forms in Other Forms Tasks (the “More” section), located on the Forms pane above the Fields List. Some of the tools are only available when a field is selected; others are available at all times. Some of the more useful tools are discussed below.
- **Duplicate across Pages:** When you have a field or fields selected, this tool allows you to duplicate the field(s) on all or selected pages. If you do not change the names of the copied fields, the new fields will be populated with the same data as in the original field. If the new fields are for different user data, they must be renamed once created.



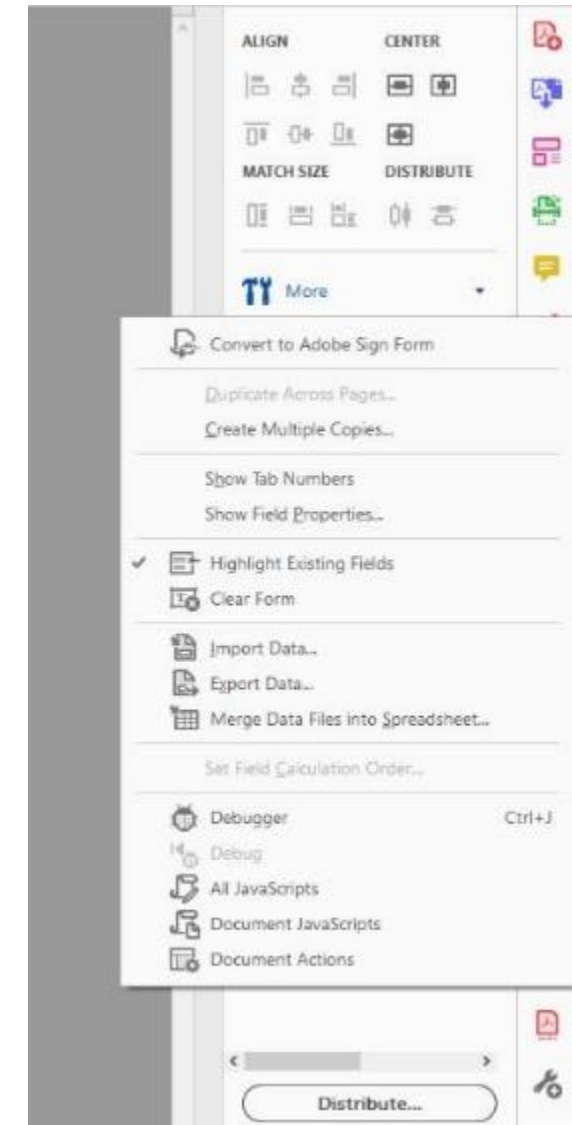
# The Forms Pane

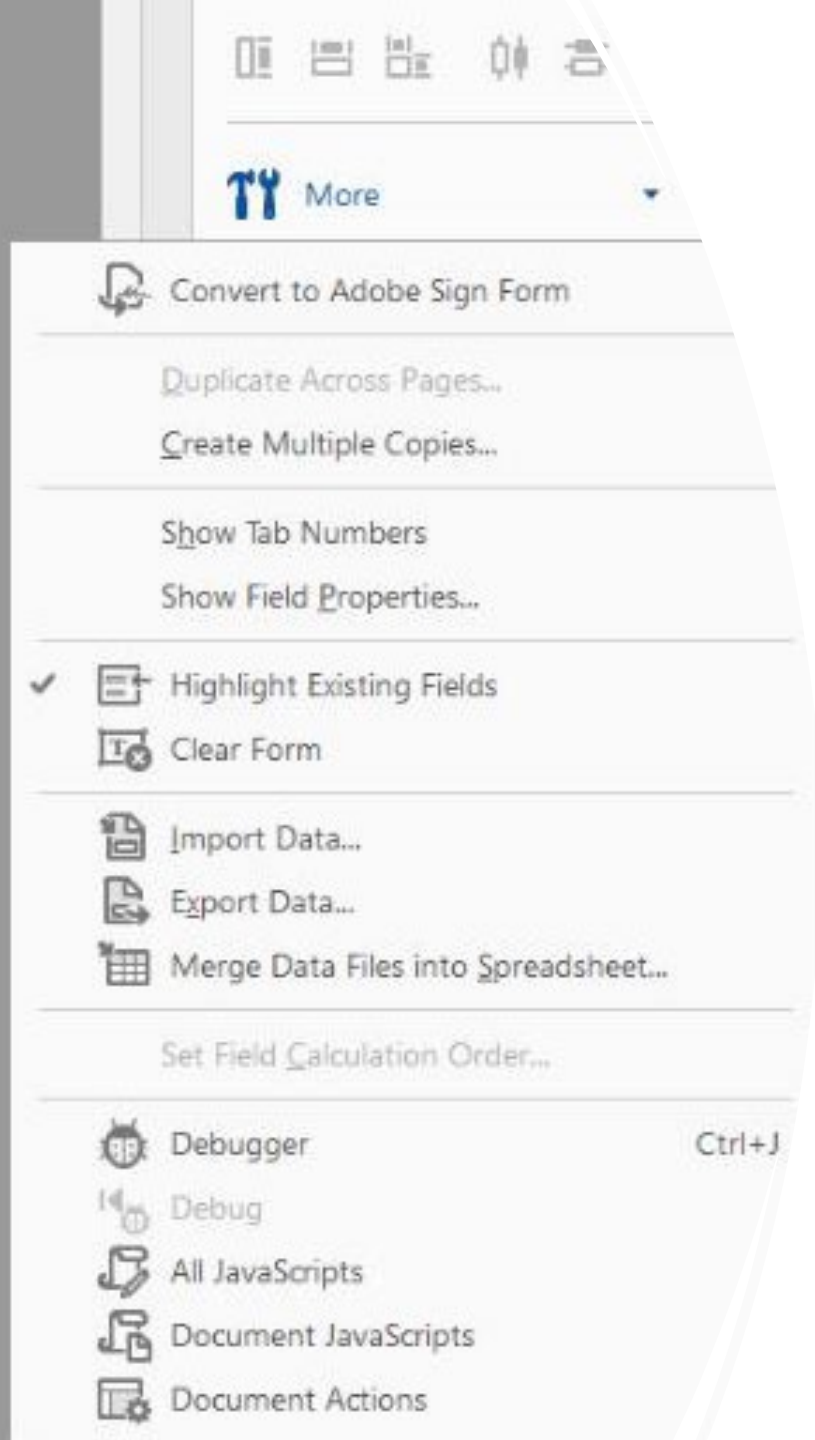
- Other tools are available to you when creating or modifying forms in Other Forms Tasks (the “More” section), located on the Forms pane above the Fields List. Some of the tools are only available when a field is selected; others are available at all times. Some of the more useful tools are discussed below.
- **Create Multiple Copies:** When you have a field or fields selected, this tool allows you to create copies of the field(s) any number of times you choose. If you do not change the names of the copied fields, the new fields will be populated with the same data as the original field. If the new fields are for different user data, they must be renamed once created.
- **Show Tab Numbers:** This tool allows you to change the order in which a user will be directed to fill a field. The fields will show the tab order.



# The Forms Pane

- Other tools are available to you when creating or modifying forms in Other Forms Tasks (the “More” section), located on the Forms pane above the Fields List. Some of the tools are only available when a field is selected; others are available at all times. Some of the more useful tools are discussed below.
- **Show Field Properties:** This tool is another method of showing the properties of selected fields.
- **Highlight Existing Fields:** This tool makes finding fillable fields easier for a user by causing the fields to appear with a colored background.





# The Forms Pane

- Other tools are available to you when creating or modifying forms in Other Forms Tasks (the “More” section), located on the Forms pane above the Fields List. Some of the tools are only available when a field is selected; others are available at all times. Some of the more useful tools are discussed below.
- **Import Data, Export Data, and Merge Data Files into Spreadsheet:** These tools are used when the form contains a Submit Form action that exported the form data into FDF, HTML, or XFDF format. This option is available to firms that desire to only export the data and not preserve the forms. Most firms will not use this option. For more information, go to <https://helpx.adobe.com/acrobat/using/collecting-pdf-form-data.html>.
- **Distribute and Track:** These tools allow you distribute a form for completion and to track the return of forms; they are discussed more fully in the following two sections.



# Enabling Users to Fill Forms Out Without Tracking (Reader Extend PDFs)

- Most of the time, you will be sending forms to clients or others without the need to track every form. For example, a client may contact you about preparing a Will, Living Will and Power of Attorney, and you have an office Questionnaire that requests the information needed to begin preparing these documents. It is easier for you and the client to have the information in a typed form. Doing so eliminates a lot of the need to ask for background information, and prevents misspellings of names, etc.

The image shows a PDF document titled "Appointment of Representative" from the Department of Health and Human Services, Form Approved OMB, Centers for Medicare & Medicaid Services. The form is partially filled out with yellow text. A context menu is open over the form, showing options: "Reduced Size PDF...", "Certified PDF...", "Reader Extended PDF" (which is highlighted), "Optimized PDF...", "Archivable PDF (PDF/A)", "Press-Ready PDF (PDF/X)", and "PDF/E". The form itself has sections for "Section 2: Acceptance of Appointment" and "Section 3: Waiver of Fee for Representation". The "Section 2" section includes a statement of acceptance and a signature line. The "Section 3" section includes instructions and a waiver statement. The form is titled "Appointment of Representative" and has a form number "No. 0038-0950".

Department of Health and Human Services Form Approved OMB  
Centers for Medicare & Medicaid Services

No. 0038-0950

**Appointment of Representative**

Medicare or National Provider Identifier Number

**Appointment of Representative**

Enable Commenting & Measuring...

Enable More Tools (includes form fill-in & save)...

I, the undersigned, authorize the undersigned to act as my representative in my stead. I understand that personal medical information related to my appeal may be indicated below.

Signature of Representative Date

City State Zip Code

**Section 2: Acceptance of Appointment**

To be completed by the representative:

I, hereby accept the above appointment. I certify that I have not been disqualified, suspended, or prohibited from practice before the department of Health and Human Services; that I am not, as a current or former employee of the United States, disqualified from acting as the party's representative; and that I recognize that any fee may be subject to review and approval by the Secretary.

I am a / an \_\_\_\_\_  
(Professional status or relationship to the party, relative, etc.)

Signature of Representative Date

Street Address Phone Number (with Area Code)

City State Zip Code

**Section 3: Waiver of Fee for Representation**

Instructions: This section must be completed if the representative is required to, or chooses to waive their fee for representation. (Note that providers or suppliers that are representing a beneficiary and furnished the items or services may not charge a fee for representation and must complete this section.)

I waive my right to charge and collect a fee for representing before the Secretary of the \_\_\_\_\_



The image shows a PDF document titled "Appointment of Representative" from the Department of Health and Human Services. A context menu is open over the form, displaying options such as "Enable Commenting & Measuring...", "Enable More Tools (includes form fill-in & save)...", "Save as Other", "Save as Reader Extended PDF", "Save as PDF (PDF/A)", and "Save as PDF (PDF/X)". The form itself contains sections for "Section 2: Acceptance of Appointment" and "Section 3: Waiver of Fee for Representation".

Department of Health and Human Services Form Approved OMB  
for Medicare & Medicaid Services

### Appointment of Representative

Medicare or National Provider

of Representative

Enable Commenting & Measuring...

Enable More Tools (includes form fill-in & save)...

I hereby accept the above appointment. I certify that I have not been disqualified, suspended, or prohibited from practice before the department of Health and Human Services or an employee of the United States, disqualified from acting as the party's representative; and I may be subject to review and approval by the Secretary.

a / an (Professional status or relationship to the party, relative, etc.)

Signature of Representative

Address Phone Number (with Area Code)

State Zip Code

### Section 3: Waiver of Fee for Representation

Instructions: This section must be completed if the representative is required to, or chooses to, represent the beneficiary. (Note that providers or suppliers that are representing a beneficiary and must not charge a fee for representation and must complete this section.)

I hereby waive my right to charge and collect a fee for representing before the Secretary of the

# Enabling Users to Fill Forms Out Without Tracking (Reader Extend PDFs)

- Acrobat converts any form into a fillable PDF that does not require the end user to have a paid version. In other words, all they need is the free Acrobat Reader or a similar product. To enable that feature, go to File>Save as Other>Reader Extended PDF. There are two types of Reader Extended PDFs, one that enables commenting and measuring and the other that can be filled and saved. If you want to allow users to fill and save the document, you will view the Enable Usage Rights in Adobe Acrobat Reader dialog. When you click Save Now on this dialog, users can save form data, digitally sign a PDF and add comments. To prevent overwriting the original form, Acrobat will ask you to save the document with either a new name or in a different location from the original. Once you save the document, you cannot modify it.



# Filling Out PDF Forms

- PDFs have two types of forms: PDFs with form fields and PDFs without form fields. You can convert the form into a fillable form, and should do so if you will use the form again. If you are only using the form one time (for example, you are emailed a form to complete and you do not anticipate having to do so again), then you can use what was formerly known as the Typewriter tool, now known as Add Text, which is located by Selecting Tools>Edit PDF. See “Adding Text in an Existing PDF (Formerly Known as the Typewriter Tool)” in Chapter 6.
-



# Filling Out PDF Forms When You Must Use the Original Paper Document

There are times when you will need to fill in a form or other document and you must use the original paper form or document, not a copy that you generate and print on generic paper from your own printer. For example, if you need to create a corporate kit and have the original binder and pages, you need to fill in the information on the actual paper contained in the binder. In these instances, you do not need to use a typewriter.

- First, you can scan the original paper document and create a PDF. After creating the PDF, you can either convert the document into a PDF fillable form or manually add form fields. Fill out the forms fields and then load the original paper document into your printer's paper tray and print the PDF using (1) the "Form Fields only" option in the Comments & Forms section, and (2) the "Actual size" option of the Page Sizing & Handling section of the Print dialog box.
-

# Filling Out PDF Forms When You Must Use the Original Paper Document

- **NOTE:** Before printing the final version of the document, you should print a test page on blank printer paper to ensure that the information you typed will be printed in the correct locations on the document. You can usually determine this by holding the typed document over the original form and viewing it in front of a light source. In addition, make sure you load the original documents correctly in your print trays (loaded so that page one pulls into the printer first, paper face up or face down, paper with top to the back of the tray or to the front).

# Creating, Modifying, and Working with Forms in Adobe Acrobat DC

**Presented by:**

**Daniel J. Siegel, Esquire**



# *Creating, Modifying, and Working with Forms in Adobe Acrobat DC*

**By Daniel J. Siegel & Pamela A. Myers**  
**Integrated Technology Services, LLC**  
**[www.techlawyergy.com](http://www.techlawyergy.com)**

Every law office uses forms, whether they are government documents clients must complete or an intake questionnaire created in Word. In a law office, forms are also useful for obtaining information from clients or standardizing documents. The problem with forms is that many offices still open a form, print it out, and then fill it in either by hand or by typing the necessary information. Adobe Acrobat allows you to create fillable forms from existing PDF documents.

Adobe Acrobat eliminates the hassle of manually completing forms by allowing users to transform virtually any document into a form that can be filled out or into a form that can be used over and over. Consider various Social Security forms. For example, every lawyer who represents a Social Security disability claimant must prepare various forms and submit them to the Social Security Administration. By converting the static forms into ones with fillable form fields, you can avoid typing all of the firm and attorney information every time and save time in the process.

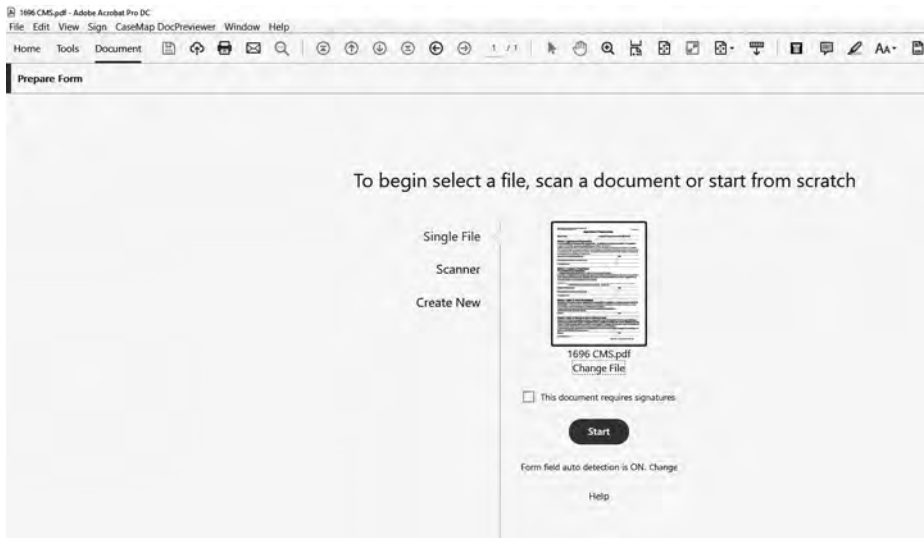
Forms can be modified in a number of ways, distributed, and tracked. This chapter outlines many of the basics and some advanced aspects of creating Acrobat forms, which can even be used by persons who only have the free Acrobat Reader or are using the mobile Acrobat Reader app. For more advanced information about creating forms, visit the Acrobat Help area of the program. There are also many excellent YouTube videos to assist.

## **Converting PDF Files to Interactive Forms**

You can convert any type of PDF into a fillable form, whether it is an existing form that you have scanned or a document you first created in Microsoft Word that you wish to make into a fillable form. First, open your PDF file and from the Tools pane, select Prepare Form. The only exception are PDFs with security settings that prohibit changing the document.

Acrobat will offer three options: Single File, Scanner, or Create New. (Figure 10-1) Generally, Acrobat displays the document you are working on and its name

**Figure 10-1**



above the Change File option. If this is the correct document, click Start. If you select Change File, you can use Windows File Explorer or Mac Finder to browse and locate the file you want to convert into a form. When the correct document is displayed, click Start.

If you select “Scanner,” a scanner-like interface appears. Once you scan a document, Acrobat will begin the process of creating a form. Finally, “Create New” will open a new blank document, which can be used to create a form “from scratch.”

**NOTE:** We recommend scanning and saving any paper documents you want to convert into a form before attempting to create a fillable form. This will allow you to create the form and then work with it, discarding any changes if you discover that you need to start over.

After you select Start, Acrobat will analyze the document and add form fields where it feels they are appropriate based on the text of the document and its analysis of locations with blank lines. (Figure 10-2)

**NOTE:** This autodetection is set by default. You can check this default setting, and change other settings, by modifying Forms preferences in Edit>Preferences>Forms for Windows or Acrobat Pro DC>Preferences for Mac.

The Prepare Form toolbar appears above your document, and the Forms pane will display to the right. The Prepare Form toolbar contains the tools for creating different types of fields, the Pin tool, a Help button, and a Preview button, which allows you to view the form as it will display to an end user and then easily go back into Edit mode.

The Forms pane displays a list of the fields that Acrobat has added. (Figure 10-3) Adjacent to the FIELDS title are two dropdown menus. The right dropdown sorts your tabs (form fields) alphabetically or in tab order. The left dropdown menu



Figure 10-2

Appointment of Representative

Name of Party: [Redacted] Mediators or National Provider Identifier Number: [Redacted]

Section 1: Appointment of Representative

To be completed by the party seeking representation (i.e., the Mediators beneficiary, the provider or the supplier):

I appoint this individual, to act as my representative, in connection with my claim or asserted right under title 38 of the United States Code (the "Act") and related provisions of title 38 of the Act. I authorize this individual to make any request, to present or to add evidence, to obtain medical information, and to receive any notice in connection with my appeal, wholly or in my stead. I understand that personal medical information related to my appeal may be disclosed to the representative indicated below.

Signature of Party Seeking Representation: [Redacted] Date: [Redacted]

Street Address/Phone Number (with Area Code): [Redacted]

City/State/Zip Code: [Redacted]

Section 2: Acceptance of Appointment

To be completed by the representative:

I, [Redacted], acting as the representative, I certify that I have not been disqualified, suspended, or prohibited from practice before the Department of Health and Human Services, that I am not, as a current or former employee of the United States, disqualified from acting as the party's representative, and that I recognize that any fee may be subject to review and approval by the Secretary.

I am: a(n) [Redacted] (Professional status or relationship to the party, relative, etc.)

Signature of Representative: [Redacted] Date: [Redacted]

Street Address/Phone Number (with Area Code): [Redacted]

City/State/Zip Code: [Redacted]

Section 3: Waiver of Fee for Representation

Instructions: This section must be completed if the representative is required to, or chooses to waive their fee for representation. Note that providers or suppliers that are representing a beneficiary and furnished the items or services may not charge a fee for representation and must complete this section.

I waive my right to charge and collect a fee for representing before the Secretary of the Department of Health and Human Services.

Signature: [Redacted] Date: [Redacted]

Section 4: Waiver of Payment for Items or Services at Issue

Instructions: Providers or suppliers serving as a representative for a beneficiary to whom they provided items or services must complete this section if the appeal involves a question of liability under section 1070a(c)(2) of the Act. Section 1070a(c)(2) generally addresses whether a provider/supplier or beneficiary did not know, or could not reasonably be expected to know, that the items or services at issue would not be covered by Medicare.

I waive my right to collect payment from the beneficiary for the items or services at issue in this appeal if a determination of liability under §1070a(c)(2) of the Act is at issue.

Signature: [Redacted] Date: [Redacted]

Figure 10-3

Appointment of Representative

Name of Party: [Redacted] Mediators or National Provider Identifier Number: [Redacted]

Section 1: Appointment of Representative

To be completed by the party seeking representation (i.e., the Mediators beneficiary, the provider or the supplier):

I appoint this individual, to act as my representative, in connection with my claim or asserted right under title 38 of the United States Code (the "Act") and related provisions of title 38 of the Act. I authorize this individual to make any request, to present or to add evidence, to obtain medical information, and to receive any notice in connection with my appeal, wholly or in my stead. I understand that personal medical information related to my appeal may be disclosed to the representative indicated below.

Signature of Party Seeking Representation: [Redacted] Date: [Redacted]

Street Address/Phone Number (with Area Code): [Redacted]

City/State/Zip Code: [Redacted]

Section 2: Acceptance of Appointment

To be completed by the representative:

I, [Redacted], acting as the representative, I certify that I have not been disqualified, suspended, or prohibited from practice before the Department of Health and Human Services, that I am not, as a current or former employee of the United States, disqualified from acting as the party's representative, and that I recognize that any fee may be subject to review and approval by the Secretary.

I am: a(n) [Redacted] (Professional status or relationship to the party, relative, etc.)

Signature of Representative: [Redacted] Date: [Redacted]

Street Address/Phone Number (with Area Code): [Redacted]

City/State/Zip Code: [Redacted]

Section 3: Waiver of Fee for Representation

Instructions: This section must be completed if the representative is required to, or chooses to waive their fee for representation. Note that providers or suppliers that are representing a beneficiary and furnished the items or services may not charge a fee for representation and must complete this section.

I waive my right to charge and collect a fee for representing before the Secretary of the Department of Health and Human Services.

Signature: [Redacted] Date: [Redacted]

Section 4: Waiver of Payment for Items or Services at Issue

Instructions: Providers or suppliers serving as a representative for a beneficiary to whom they provided items or services must complete this section if the appeal involves a question of liability under section 1070a(c)(2) of the Act. Section 1070a(c)(2) generally addresses whether a provider/supplier or beneficiary did not know, or could not reasonably be expected to know, that the items or services at issue would not be covered by Medicare.

I waive my right to collect payment from the beneficiary for the items or services at issue in this appeal if a determination of liability under §1070a(c)(2) of the Act is at issue.

Signature: [Redacted] Date: [Redacted]

is the Reading Order tool, which allows you to specify in what order users will go as they move between tabs. If you enable Show Tab Numbers, it may be easier to arrange tabs as you edit the document. You can sort (Order) the tabs (form fields) by Structure, by Row, or by Column to make it easier for the end user.

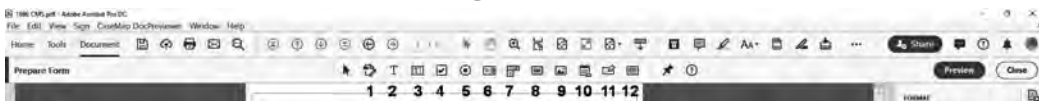


When you review the document and the form fields that Acrobat has inserted, you will likely note that Acrobat has inserted fields where you do not need them or has not inserted them where you do need them. You can manually add form fields by using the tools on the Prepare Form toolbar or by right-clicking on the document and choosing one of the field types from the menu. You can easily delete fields by selecting the field and pressing the Delete key or by right-clicking on a field and choosing Delete.

**NOTE:** If a document has been password protected to prevent editing, or Reader-Enabled, you will not be able to add new fields or modify the existing fields.

## Types of Form Fields (The types of fields correspond to the numbers listed under the fields in Figure 10-4.) (Figure 10-4)

**Figure 10-4**



- **Edit Text & Images: [1]** This allows editing of text and images.
- **Add Text: [2]** This tool allows you to add text directly to the file.
- **Text Field: [3]** This tool allows users to type alphabetic or numeric characters.
- **Check Box: [4]** This tool presents choices for the user; multiple check boxes can be selected if the form allows it.
- **Radio Button: [5]** This tool presents choices for the user; only one radio button can be selected (for example, to choose yes or no).
- **List Box: [6]** This tool displays a list of options a user can select; you can enable a user to select multiple items from the list.
- **Dropdown List: [7]** This tool allows a user to choose an item from a pop-up menu.
- **Button: [8]** These action buttons allow a user to perform functions such as Print, Reset, or Submit a form. They can also be used to perform other actions, such as moving the user to a specific page, opening a file, or opening a web page.
- **Image Field: [9]** The image field allows the user to select an image to upload and include in the document.
- **Add a Date Field: [10]** The Add a Date field is the same as a text field that requires the user to input a date in a specific format, without the extra steps.
- **Digital Signature: [11]** This tool allows a user to digitally sign a document.

- **Barcode Field: [12]** This tool encodes the data that is inputted on a form and creates a barcode. This field is not likely to be used by attorneys and will not be discussed in this book.

**NOTE:** Whenever you add a form field to a document, you always have a Properties box that provides you with multiple options and settings for the form field. Because these properties boxes and options are so similar for all types of form fields, we are not showing what each looks like, but you should review the properties when you add form fields to ensure that your fields display the way you want them to.

## Using Text Fields

Most legal professionals will use text fields in every document. Learning how to create and modify them is crucial to creating documents that not only look good but are also user-friendly.

To add a text field, choose the Text Field button from the Prepare Form toolbar or right-click on the document and choose Text Field from the menu. (Figure 10-5 and Figure 10-6) Place your cursor on the page where you wish the field to appear and left-click. A box will appear that will prompt you to add a Field Name. A default name such as “Text1” will appear in the box. You should not keep this default name but should instead add a descriptive, meaningful name for the field. (Figure 10-7)

**Figure 10-5**



**Figure 10-6**

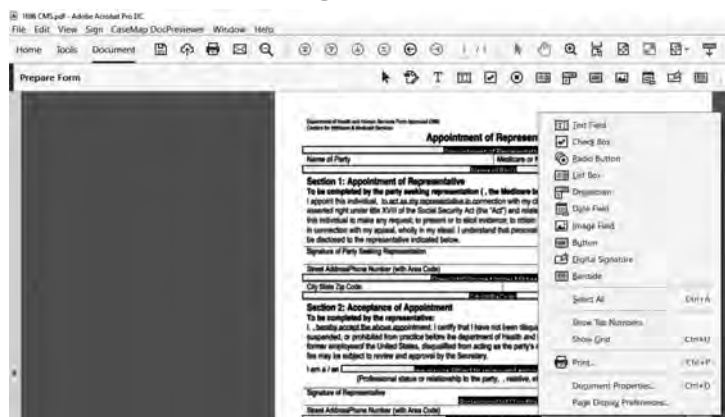


Figure 10-7



**NOTE:** If fields have the same name, when users type into the form field, the text they type will populate in the other fields with the same name. This can be useful if the form has areas where text needs to be repeated (such as a name, address, birthdate, etc.). Be careful when naming your fields to choose unique names that are not already in use in the document.

If you check the box for “Required field,” the user must fill in the field.

If the field is not properly sized, you can drag the handles on the field to the correct size.

You can open the Text Field Properties box by double-clicking on the field or by right-clicking and choosing Properties. There are eight tabs that contain various properties that you can modify. (Figure 10-8)

- **General Tab:** This tab displays the current name of the field, a Tooltip box, and options for whether to make the field Read Only or Required, whether the field should be visible either in screen or in print, and whether to rotate the field. Making a form field required will not allow a user to submit a form without adding information to the field. Adding text to the Tooltip will display text over the field when a user’s mouse pointer hovers over it. This device aids a user in knowing exactly what information, and in what format, should be typed in the box. (Figure 10-8)

Figure 10-8



- **Appearance Tab:** This tab determines whether the field has a border or a fill color, the properties of the border such as color and thickness, and in which font and font size the text a user types will display. (Figure 10-9)
- **Position Tab:** This tab determines the placement of the field on the page in terms

Figure 10-9



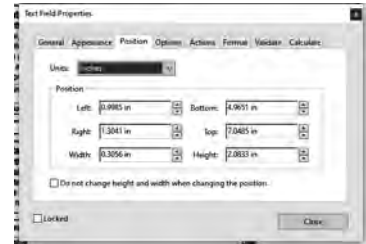
of inches, points, etc. This property can be used to ensure that your fields are aligned or that they are in the same position as other text on the page. (Figure 10-10)

- **Options Tab:** This tab determines the alignment (Left, Center, Right) of the text a user types as well as whether the text is spell checked. You can limit the number of characters that can be typed and allow for multiline or scrolling of long text. The multiline option allows users to type hard returns in their text. Scrolling will allow a user to type a long string of text, but will not allow for hard returns. If a user types a string of text that exceeds the box, the text that exceeds the field's dimensions will not be visible in the field. By checking the box to Allow Rich Text Formatting, you can enable your users to add formatting such as bold or italics to their text. (Figure 10-11)

- **Actions Tab:** This tab allows you to associate actions with the form field such as moving the user to a specific page, opening a file, or opening a web page. You can also use an action to submit the form when the user completes the final field. To add an action, you choose the trigger (Mouse Down is a click, Mouse Up is releasing after a click, Mouse Enter is moving the pointer over the button, and Mouse Exit is moving the pointer away from the button) and then use the Add button to add the desired action. Although you can use this feature with a text field, it is more commonly used when inserting an action button, discussed later in this chapter. (Figure 10-12)

- **Format Tab:** This tab automatically formats the information a user enters in a specific way. (Figure 10-13)
  - ❖ None: This option applies no formatting.
  - ❖ Number: This option provides number formatting options similar to those found in Microsoft Excel for decimal places, separators such as

**Figure 10-10**



**Figure 10-11**



**Figure 10-12**



commas and periods, currency symbols and locations of those symbols, and negative number style (with or without parentheses or red text).

- ❖ **Percentage:** This option provides formatting options for decimal places and separators such as commas and periods.
- ❖ **Date:** This option provides formatting options for various date styles, such as m/d, mm/dd/yy, or yyyy-mm-dd. You can also use a style that combines date and time if you need to display both.
- ❖ **Time:** This option provides formatting options for various time styles, such as HH:MM or h:MM:ss tt (where tt is the a.m. or p.m. indicator). If you need to combine date and time, you should use the Date formatting option.
- ❖ **Special:** This option provides formatting options for Zip Code, Zip Code +4, Phone Number, and Social Security Number.
- ❖ **Custom:** This option provides further options using JavaScripts. Most lawyers will not need this option.

- **Validate Tab:** This tab restricts entry in a text field to specified ranges, values, or characters. If you choose to use a number or percentage format, for example, on the Format tab, you can limit the entry to numbers within a certain range. The option to limit the range is grayed out when it does not apply to your Format style. (Figure 10-14)

- **Calculate Tab:** This tab performs mathematical operations on field entries and displays the result. You can easily display the sum of the value of various fields, or the product of various fields. This can be used for expense reimbursement forms where you can easily calculate the amount to be reimbursed by multiplying a predefined mileage rate by the number of miles a user inserts in a form. (Figure 10-15)

**Figure 10-13**



**Figure 10-14**



**Figure 10-15**



## **How to set up calculated fields:<sup>1</sup>**

### **To add text fields**

1. Double-click the field where you want to display the result to open the Properties dialog box.
2. Click the Calculate tab.
3. To add the values entered into fields, click the “Value is the” radio button.
4. Pick Sum from the pop-up menu.
5. Click Pick to open a list of the fields in your form, select the fields you want to add, and click OK to list the fields in the dialog box.

### **To multiply values**

1. Double-click the field where you want to display the result to open the Properties dialog box.
2. Click the Calculate tab.
3. To multiply the values entered into fields, click the “Value is the” radio button.
4. Pick Product from the pop-up menu.
5. Click Pick to open a list of the fields in your form, select the fields you want to multiply, and click OK to list the fields in the dialog box.

### **To subtract one field from another**

1. Open the Properties for the results field.
2. Click the Calculate tab.
3. Now click the Simplified Field Notation radio button.
4. Click Edit to open the Javascript Editor.
5. Type the expression in the editor, such as Field1-Field2. Make sure not to add any spaces.
6. Click OK and you’ll see the expression show on the dialog box.

### **To divide two fields**

1. In the Calculate tab for the results field, choose Simplified Field Notation, and click Edit.

---

1. These instructions for creating calculated fields are from <https://acrobatusers.com/tutorials/how-do-i-use-basic-calculations-in-a-form/>, which offers excellent guidance on these operations, and many other Adobe Acrobat features and functions.



2. In the JavaScript Editor, type FieldB/FieldA. Again, make sure you don't have any spaces. Click OK and you'll see the expression on the Properties dialog box.
3. Click Preview to toggle the Preview mode to test your work. You won't have any surprises with adding, subtracting, or multiplying, but a division calculation can cause display problems.

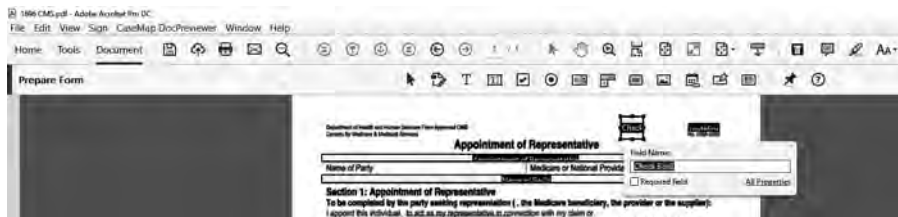
- **Locked Button:** This choice appears on the bottom of each tab. If you check this box, the form field properties cannot be changed. Checking the box on one tab locks the options on all of the other tabs. If you need to make changes to the field properties, simply uncheck the box.

You can change the properties of multiple fields at one time by Ctrl-clicking or Cmd-clicking on the fields, right-clicking on one field, and choosing Properties. Note that, depending on the properties of the fields you select (the type of field, etc.), all of the options will not be available.

## Using Check Box Fields

To add a check box field, choose the Check Box Field button from the Prepare Form toolbar or right-click on the document and choose Check Box from the menu. Place your cursor on the page where you wish the field to appear and left-click. A box will appear that will prompt you to add a Field Name. A default name such as "Check Box1" will appear in the box. You should not keep this default name but rather add a descriptive, meaningful name for the field. (Figure 10-16)

Figure 10-16



**NOTE:** If fields have the same name, when users type into the field, the text they type will populate in the other fields with the same name. This can be useful if the form has areas where text needs to be repeated (such as a name, address, birthdate, etc.). Be careful to choose unique names when naming your fields to avoid using names that are already in use in the document.

If you check the box for Required Field, this field will have to be completed by the user for the form to be complete.

If the field is not properly sized, you can drag the handles on the field to the correct size.

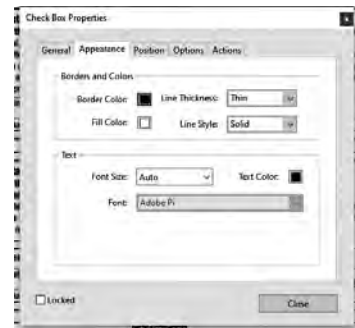
You can open the Check Box Properties box by double-clicking on the field or by right-clicking and choosing Properties. There are five tabs that contain various properties that you can modify.

- **General Tab:** This tab displays the current name of the field, a Tooltip box, and options for whether to make the field Read Only or Required, whether the field should be visible either in screen or in print, and whether to rotate the field. Making a form field required will not allow a user to submit a form without adding information to the field. Adding text to the Tooltip will display text over the field when a user's mouse pointer hovers over it. This device aids a user in knowing exactly what information, and in what format, should be typed in the box. (Figure 10-17)
- **Appearance Tab:** This tab determines whether the field has a border or a fill color, the properties of the border such as color and thickness, and in which font and font size the text a user types will display. (Figure 10-18)
- **Position Tab:** This tab determines the placement of the field on the page in terms of inches, points, etc. This property can be used to ensure that your fields are aligned or that they are in the same position as other text on the page. (Figure 10-19)
- **Options Tab:** This tab determines the Check Box style (whether the user's choice is displayed as a checkmark, a circle, a star, etc.) as well as whether the box should be checked by default or not. The Export Value is set as Yes by default, but depending on what the check box signifies, you can change this value. (Figure 10-20)
- **Actions Tab:** This tab allows you to associate actions with the form field such as moving the user to a specific page, opening a file, or opening a web page. You can also use an

**Figure 10-17**



**Figure 10-18**



**Figure 10-19**



**Figure 10-20**





action to submit the form when the user completes filling out the document. To add an action, you choose the trigger (Mouse Down is a click, Mouse Up is releasing after a click, Mouse Enter is moving the pointer over the button, and Mouse Exit is moving the pointer away from the button) and then use the Add button to add the desired action. Although you can use this feature with a Check Box field, it is more commonly used when inserting an action button, discussed later in this chapter. (Figure 10-21)

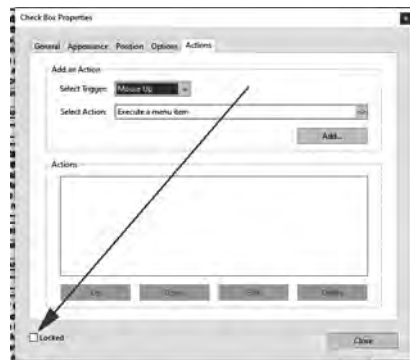
- **Locked Button:** This choice appears on the bottom of each tab. If you check this box, the form field properties cannot be changed. Checking the box on one tab locks the options on all of the other tabs. If you need to make changes to the field properties, simply uncheck the box.

You can change the properties of multiple fields at one time by Ctrl-clicking on the fields, right-clicking on one field, and choosing Properties. Note that depending on the properties of the fields you select (the type of field, etc.), all of the options will not be available. (Figure 10-22)

**Figure 10-21**



**Figure 10-22**



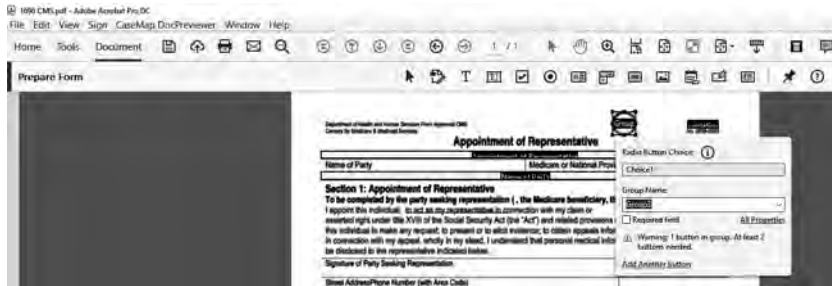
## Using Radio Button Fields

A radio button requires users to select one entry from a predefined set of two or more options. Thus, you must always add at least two radio buttons to a document.

- To add a radio button field, choose the Radio Button Field button from the Prepare Form toolbar or right-click on the document and choose Radio Button from the menu. Place your cursor on the page where you wish the button to appear and left-click. A box will appear that will remind you that when using radio buttons, you must have more than one. It will prompt you to add a Radio Button Choice Name. A default name such as "Choice1" will appear in the box. You should not keep this default name but rather add a descriptive, meaningful name for the field. You will then enter a name for the Group Name. You then click the Add Another Button link, place your cursor on the page where you wish the second radio

button to appear, and provide a name for this choice. You should confirm that the Group Name is the same as was listed for your first radio button. All radio buttons in a set must have the same Group Name. (Figure 10-23)

**Figure 10-23**



If you check the box for “Required field,” this field will have to be completed by the user for the form to be complete.

You can open the Radio Button Properties box by double-clicking on the field or by right-clicking and choosing Properties. There are five tabs that contain various properties that you can modify.

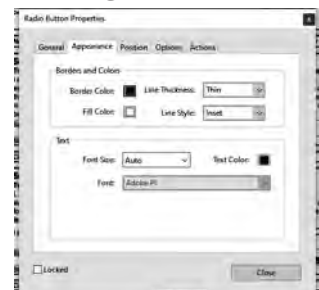
- **General Tab:** This tab displays the current name of the field, a Tooltip box, and options for whether to make the field Read Only or Required, whether the field should be visible either in screen or in print, and whether to rotate the field. Making a form field required will not allow a user to submit a form without adding information to the field. Adding text to the Tooltip will display text over the field when a user’s mouse pointer hovers over it. This device aids a user in knowing exactly what information, and in what format, should be typed in the box. (Figure 10-24)

**Figure 10-24**



- **Appearance Tab:** This tab determines whether the field has a border or a fill color, the properties of the border such as color and thickness, and in which font and font size the text a user types will display. (Figure 10-25)

**Figure 10-25**



- **Position Tab:** This tab determines the placement of the field on the page in terms of inches, points, etc. This property can be used to ensure that your fields are aligned or that they are in the same position as other text on the page. (Figure 10-26)

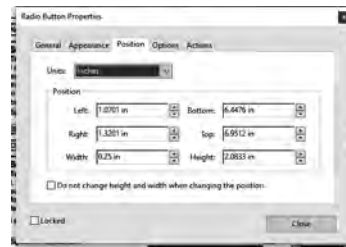
- **Options Tab:** This tab determines the Radio Button Style (whether the user's choice is displayed as a checkmark, a circle, a star, etc.) as well as whether the button is checked by default or not. (Figure 10-27)

- **Actions Tab:** This tab allows you to associate actions with the form field such as moving the user to a specific page, opening a file, or opening a web page. You can also use an action to submit the form when the user completes the final field. To add an action, you choose the trigger (Mouse Down is a click, Mouse Up is releasing after a click, Mouse Enter is moving the pointer over the button, and Mouse Exit is moving the pointer away from the button) and then use the Add button to add the desired action. Although you can use this feature with a Radio Button field, it is more commonly used when inserting an action button, discussed later in this chapter. (Figure 10-28)

- **Locked Button:** This choice appears on the bottom of each tab. If you check this box, the form field properties cannot be changed. Checking the box on one tab locks the options on all of the other tabs. If you need to make changes to the field properties, simply uncheck the box.

You can change the properties of multiple fields at one time by Ctrl-clicking on the fields, right-clicking on one field, and choosing Properties. Note that depending on the properties of the fields you select (the type of field, etc.), all of the options will not be available.

**Figure 10-26**



**Figure 10-27**



**Figure 10-28**



## Using List Box and Dropdown Fields

To add a List Box or a Dropdown field, choose either the List Box or Dropdown Field button from the Prepare Form toolbar or right-click on the document and choose the appropriate item from the menu. Place your cursor on the page where you wish the field to appear and left-click. A box will appear that will prompt you to add a Field Name. A default name such as "List Box 1" or "Dropdown1" will

appear in the box. You should not keep this default name but rather add a descriptive, meaningful name for the field.

**NOTE:** If fields have the same name, when users type into the field, the text they type will populate in the other fields with the same name. This can be useful if the form has areas where text needs to be repeated (such as a name, address, birthdate, etc.). Be careful to choose unique names when naming your fields to avoid using names that are already in use in the document. Then you can complete the last sentence as it is duplicative.

If you check the box for Required Field, this field will have to be completed by the user for the form to be complete.

If the field is not properly sized, you can drag the handles on the field to the correct size.

You can open the List Box or Dropdown Properties box by double-clicking on the field or by right-clicking and choosing Properties. There are either six (List Box) or seven (Dropdown) tabs that contain various properties that you can modify. The tabs are generally common to both types of field. Because many of the property tabs are similar to those displayed earlier in this chapter, only those unique to these fields are displayed.

- **General Tab:** This tab displays the current name of the field, a Tooltip box, and options for whether to make the field Read Only, whether the field should be visible either in screen or in print, and whether to rotate the field. Making a form field required will not allow a user to submit a form without adding information to the field. Adding text to the Tooltip will display text over the field when a user's mouse pointer hovers over it. This device aids a user in knowing exactly what information, and in what format, should be typed in the box.
- **Appearance Tab:** This tab determines whether the field has a border or a fill color, the properties of the border such as color and thickness, and in which font and font size the text a user types will display.
- **Position Tab:** This tab determines the placement of the field on the page in terms of inches, points, etc. This property can be used to ensure that your fields are aligned or that they are in the same position as other text on the page.
- **Options Tab:** This tab is the vital one for creating a list. In the line marked Item, you type the various choices for the list. You then click Add to add them to the Item List below. If you wish to remove an item, simply highlight it and click Delete.

The Item List displays the choices available to the user. The item that appears highlighted on the list is the default choice. Depending on your form's purpose, you may want to add a None choice to your list. The Up and Down buttons allow you to reorder the list display, or you can click the Sort Items box to quickly alphabetize or numerically sort your list.

Clicking the Multiple Selection option (only available when using the List Box field) allows users to choose more than one item. Clicking the box Commit Selected Value Immediately saves the value as soon as a user selects it rather than only when the user moves to another field.

Clicking the Allow User to Enter Custom Text and Check Spelling options (only available when using the Dropdown field) allows a user to type text other than one of the presented choices and will spell check the entered text.

- **Actions Tab:** This tab allows you to associate actions with the form field such as moving the user to a specific page, opening a file, or opening a web page. You can also use an action to submit the form when the user completes the final field. To add an action, you choose the trigger (Mouse Down is a click, Mouse Up is releasing after a click, Mouse Enter is moving the pointer over the button, and Mouse Exit is moving the pointer away from the button) and then use the Add button to add the desired action. Although you can use this feature with a List Box or a Dropdown field, it is more commonly used when inserting an action button, discussed later in this chapter.
- **Selection Change Tab (List Box only):** This tab specifies what to do when the list box selection changes. You can choose Do Nothing or choose to execute a JavaScript. Most likely you will not use this function. (Figure 10-29)
- **Format Tab (Dropdown only):** This tab automatically formats the information a user enters in a specific way. (Figure 10-30)

- ❖ None: This option applies no formatting.
- ❖ Number: This option provides number formatting options similar to those found in Microsoft Excel for decimal places, separators such as commas and periods, currency symbols and locations of those symbols, and negative number style (with or without parentheses or red text).
- ❖ Percentage: This option provides formatting options for decimal places and separators such as commas and periods.
- ❖ Date: This option provides formatting options for various date styles, such as m/d, mm/dd/yy, or yyyy-mm-dd. You can also use a style that combines date and time if you need to display both.
- ❖ Time: This option provides formatting options for various time styles, such as HH:MM or h:MM:ss tt (where tt is the a.m. or p.m. indicator). If you need to combine date and time, you should use the Date formatting option.

Figure 10-29

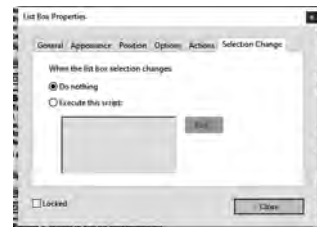


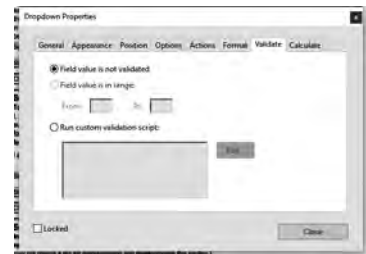
Figure 10-30





- ❖ **Special:** This option provides formatting options for Zip Code, Zip Code +4, Phone Number, and Social Security Number.
- ❖ **Custom:** This option provides further options using JavaScripts. Most lawyers will not need this option.
- **Validate Tab (Dropdown only):** This tab restricts entry in a text field to specified ranges, values, or characters. If you choose to use a number or percentage format, for example, on the Format tab, you can limit the entry to numbers within a certain range. The option to limit the range is grayed out when it does not apply to your Format style. (Figure 10-31)
- **Calculate Tab (Dropdown only):** This tab performs mathematical operations on field entries and displays the result. You can easily display the sum of the value of various fields, or the product of various fields. This is useful for expense reimbursement forms where you can easily calculate the amount to be reimbursed by multiplying a predefined mileage rate by the number of miles a user inserts in a form. (Figure 10-32)

**Figure 10-31**



**Figure 10-32**



There is also a Locked Button (similar to what appears elsewhere in the program). This choice appears on the bottom of each tab. If you check this box, the form field properties cannot be changed. Checking the box on one tab locks the options on all of the other tabs. If you need to make changes to the field properties, simply uncheck the box.

You can change the properties of multiple fields at one time by Ctrl-clicking on the fields, right-clicking on one field, and choosing Properties. Note that depending on the properties of the fields you select (the type of field, etc.), all of the options will not be available.

## Using Action Buttons

Buttons can open a file, play a movie or sound, submit information to a web server, or perform other functions that links and bookmarks do not. Every form field has an Actions tab that can execute the same types of functions as an action button. However, there are times when using an action button makes more sense, such as when you are providing an option to submit, print, or reset a form. Because many of the property tabs are similar to those displayed earlier in this chapter, only those unique to these fields are displayed. An action button can do the following:

- Activate a single action or a series of actions.
- Change its appearance in response to mouse actions.
- Be copied across many pages.
- Mouse actions can activate different button actions. For example, Mouse Down (a click), Mouse Up (releasing after a click), Mouse Enter (moving the pointer over the button), and Mouse Exit (moving the pointer away from the button) can all start a different action for the same button.
- ❖ To add an action button, choose the Button option from the Prepare Form toolbar or right-click on the document and choose Button from the menu. Place your cursor on the page where you wish the button to appear and left-click. A box will appear that will prompt you to add a Field Name. A default name such as “Button1” will appear in the box. You should not keep this default name but rather add a descriptive, meaningful name for the field.

**NOTE:** If fields have the same name, when users type into the field, the text they type will populate in the other fields with the same name. This can be useful if the form has areas where text needs to be repeated (such as a name, address, birthdate, etc.). Be careful to choose unique names when naming your fields to avoid using names that are already in use in the document.

If you check the box for Required Field, this field will have to be completed by the user for the form to be complete.

If the field is not properly sized, you can drag the handles on the field to the correct size.

You can open the Button Properties box by double-clicking on the field or by right-clicking and choosing Properties. There are five tabs that contain various properties that you can modify.

- ◆ **General Tab:** This tab displays the current name of the field, a Tooltip box, and options for whether to make the field Read Only, whether the field should be visible either in screen or in print, and whether to rotate the field. Adding text to the Tooltip will display text over the field when a user’s mouse pointer hovers over it. This device aids a user in knowing exactly what information, and in what format, should be typed in the box.
- ◆ **Appearance Tab:** This tab determines whether the field has a border or a fill color, the properties of the border such as color and thickness, and in which font and font size the text a user types will display.
- ◆ **Position Tab:** This tab determines the placement of the field on the page in terms of inches, points, etc. This property can be used to ensure that your fields are aligned or that they are in the same position as other text on the page.
- ◆ **Options Tab:** This tab determines how your button is displayed: as a Label only, an Icon only, or a combination of both in various

configurations. Depending on which option you choose, you will be able to enter the text of the label and/or browse to your computer for an appropriate icon. A preview of the icon will appear in this window. The Advanced dialog allows you to change the way the icon is scaled to fit inside the button.

- ♦ The Button Behavior determines how the button displays when clicked. None keeps the button appearance the same, Push specifies how the button looks as a mouse either hovers over or clicks the button, Outline highlights the button border, and Invert reverses the dark and light shades of the button.
- ♦ **Actions Tab:** This tab allows you to associate an action with the button such as moving the user to a specific page, opening a file, or opening a web page. You can also use an action to submit the form when the user completes the final field. To add an action, you first choose the trigger. Mouse Down is a click, Mouse Up is releasing after a click, Mouse Enter is moving the pointer over the button, and Mouse Exit is moving the pointer away from the button. In most cases, you will want to use Mouse Up. There are other triggers, such as Page Visible and Invisible, Page Enter and Exit, and On Focus, that are used only with media clips; however, you will not customarily use these triggers, so we only briefly mention them here.

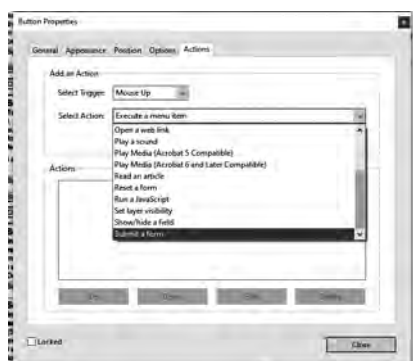
You will then use the Add button to add the desired action such as opening a web page, submitting the form, or resetting the form.

## ■ Using the Submit a Form Action (Figure 10-33)

The “Submit a form” action allows a user to click on a button and open an email window in a user’s default email client with a predetermined email recipient and the form as an attachment. The user then adds any message and sends the email to the prespecified email address.

- ❖ When using the “Submit a form” action, you are prompted to enter a URL. (Figure 10-34)

**Figure 10-33**



**Figure 10-34**





- ❖ You can collect form data either on a server or as attachments to email. Which option you choose will depend on the purpose of the form. If you are using the form to assemble data from a number of sources to be merged together, you may want to use the server option. If you are sending a form to a specific client and want to see the responses on the form, you may want to use the email attachment option.
  - ◆ To collect form data on a server, type the location in the “Enter a URL for this link” box: for example, \\[server]\\[folder]\\[subfolder].
  - ◆ To collect form data as attachments to email, type mailto: followed by the email address: for example, mailto:nobody@techlawyergy.com.
- ❖ You would then choose the Export format (FDF, HTML, XFDF, or PDF, which will return the entire file with user input). You can choose which fields are returned and whether to convert dates into a specific format. This tool is used when the form contains a “Submit a form” action that exported the form data into FDF, HTML, or XFDF format. This option is available to firms that desire to only export the data and not preserve the forms. Most firms will not use this option. For more information, go to <https://helpx.adobe.com/acrobat/using/collecting-pdf-form-data.html>.
- ❖ When you are finished, click Close.

**NOTE:** When sending a form or other document to another person for completion or for commenting, you must advise the recipient to save the document to his or her computer before completing the form or adding comments. If the recipient simply opens the email attachment without saving it, adds information, and merely hits the Save button, the document will only be stored temporarily, the recipient will not be able to find the revised version, and all of the changes will be lost. Reopening the attachment opens the blank document again.

- **Locked Button:** This choice appears on the bottom of each tab. If you check this box, the form field properties cannot be changed. Checking the box on one tab locks the options on all of the other tabs. If you need to make changes to the field properties, simply uncheck the box.

You can change the properties of multiple fields at one time by Ctrl-clicking or Cmd-clicking on the fields, right-clicking on one field, and choosing Properties. Note that depending on the properties of the fields you select (the type of field, etc.), all of the options will not be available.