

Filling in PDF forms

Mendlesham Computer Club

By Giles Godart-Brown

What is a PDF and And why do forms use them?

- PDF means Portable Document Format.
- It is designed to look the same on different computers and phones.
- A PDF can be a document to read, or an interactive form to complete.
- Important: not every PDF has fillable boxes.

How do you get a PDF form

- The most common ways are;
 - Email attachment,
 - Download from a web site,
 - DocuSign or similar service.

DocuSign and electronic signatures

- DocuSign is a service used by organisations to send and track documents electronically for people to review and sign.
- You are sent an email asking you click on a link. Click on the link → read the document → fill in any boxes, tap the signature fields → complete → finish. You will be sent an electronic copy when all parties have signed the document
- It can normally be completed in a web browser or the DocuSign app on phones, tablets, PCs or Macs.
- Typically to sign it, you type in your name and it creates a signature using a handwriting font.
- As with all emails, check that is not a scam.

Before you start

- Check where the form came from, especially if it arrived by email.
- If it asks for bank details, passwords or identity documents, pause and verify the sender.
- Save the original blank form before entering anything.
- Have the information you need nearby.
- Work on a copy if you are unsure.

The four types of PDF you may meet

1. Fillable

Click in boxes and type.

Best case, the form was designed for digital completion.

2. Scanned

Looks like a photograph of paper.

Use Acrobat 'Fill and Sign' or print it, fill in with a pen, scan and email.

3. Mixed

Some boxes work; others do not.

Very common with older forms.

4. Protected

You can view it, but editing may be restricted.

This is often deliberate.

Opening a PDF on PC, Chromebook or Mac

- Use Adobe Acrobat Reader whenever possible, especially for forms
- Chrome can open and fill in PDF forms
- Other browsers also support display of PDF forms, but not all allow them to be edited. If you don't have Acrobat Reader, then the only option is to print, fill with a pen and re-scan.

Filling in a PDF on iPhone/iPAD - 1 of 2

1. Open the PDF in Mail, Messages, Safari or the Files app.

- If necessary, tap Share → Save to Files.

2. Tap inside a form box

- If it's a genuine fillable PDF, a keyboard should appear.
- If it doesn't try clicking on the edit icon 
- Type your answer.

3. Move to the next box

Filling in a PDF on iPhone/iPAD - 2 of 2

- Tick boxes - Tap the checkbox, A tick or cross should appear.
- Choose from a drop-down - Tap the field and select the required option.
- Signing
 - If the PDF provides a signature field, follow its instructions.
 - Some apps also have a Markup → Signature facility, but whether this is acceptable depends on the organisation requesting the form.
- Save the completed form
 - Use Share → Save to Files or the app's Save option.
 - Give it a new name, such as Practice_Form_Completed.pdf.

Filling in a PDF on an Android device

- Open the PDF in Chrome. If you can't type into the form, open it with a dedicated PDF app such as Adobe Acrobat Reader.
- Tap a form field.
- Type using the on-screen keyboard.
- Tap checkboxes and choose drop-down options.
- Save/download the completed PDF rather than assuming Chrome has saved it.
- Reopen the saved PDF and check it before sending.

Recognising a fillable field - Look for the cursor or highlighted box

APPLICATION FORM

Name

Address

Date of birth

Telephone

☐

I confirm the information is correct

Try this

Click inside a box. If a cursor appears, type.

Tab key

Press Tab to move to the next field.

Tip

If nothing happens, don't keep clicking — the box may not be fillable.

Typing into text boxes

- Click once inside the field — then type.
- Do not type into the printed label unless the form allows it.
- If your text disappears or is too small, the field may have a character limit.
- Use normal punctuation and check names, postcodes and reference numbers carefully.
- Some forms automatically move the cursor or change the text size.

Dates and numbers

Date

If a form says
DD/MM/YYYY, enter
03/09/2026 for 3
September 2026.

Postcode

Use the format the form
expects, for example
B91 3XX.

Money

Check whether the form
wants £, pounds, or just a
number.

If the form rejects a value, read the instructions around the box
before trying random formats.

Tick boxes and radio buttons

Tick box

- ☐ You can often select more than one.

Example: 'Which services do you use?'

Radio button

- ☐ Usually one choice only.

Example: 'How would you like us to contact you?'

If a box will not select, try using the Tab key and Space bar.

Drop-down menus

Choose:

Morning

Morning

Afternoon

Evening

5. Your message

Common examples

Title • county • country •
reason for contact

Keyboard trick

Tab to the field, then use ↑
↓ and Enter.

Check

Make sure your chosen
option is actually visible.

Moving around a long form

- Tab — move forward between fields.
- Shift + Tab — move backwards.
- Space — tick a selected box or activate a button.
- Arrow keys — move through many lists and choices.
- Ctrl + F (Windows) / Command + F (Mac)
find a word on the page.

Saving your work

- Use Save As if you want to keep the original blank form.
- Give your completed copy a clear name, e.g. Pension_Application_03-09-2026.pdf.
- Save somewhere you can find again, Documents is often simplest.
- Close and reopen the saved PDF to check that your answers are still there.
- Do not assume that a PDF is saved just because you typed into it.

A very common problem: 'My answers disappeared'

Cause 1

The PDF was opened in a browser and not saved correctly.

Cause 2

The form contains temporary fields that another app cannot display.

Cause 3

You printed to PDF the form in a way that changed its fields.

Best practice: save, close, reopen, and check before sending.

Signing a PDF

- Some forms provide a dedicated digital signature field.
- Some allow you to type your name as a signature.
- Some let you draw a signature with a mouse, trackpad or touchscreen.
- Some organisations require a specific type of electronic signature or a printed signature.
- If the form gives instructions, follow those rather than assuming any signature method is acceptable.

Adding a handwritten signature

Option A

Print → sign with a pen → scan or photograph → return as instructed.

Option B

Use a tablet/ phone or PDF app to draw your signature.

Option C

Use the PDF's own signature tool if provided.

Never send a signature to an unverified person just because they ask for one.

Adding an attachment

- A form may ask you to upload a passport, proof of address, bank statement or other document.
- Usually this means attaching a separate file when you submit the form.
- If the PDF itself has an 'Attach file' button, use it only if you understand where the file will be stored.
- Check exactly what documents are requested and whether copies are acceptable.

ONLY DO THIS WHEN YOU HAVE VERIFIED WHO IS REQUESTING THIS INFORMATION

Protecting your personal information

- Treat National Insurance numbers, bank details, passport details and medical information as sensitive.
- Do not upload a document to a random website just because it says it can 'edit PDFs'.
- Be wary of unexpected requests to complete forms urgently.
- Check the organisation's official website or contact details independently.

When the PDF will not let you type - don't fight the form

- Use the Adobe Acrobat reader 'Fill & Sign' tool.
 - It allows you to add text, symbols and images (e.g. signatures) to the page even when there are no form fields.
 - After editing, save a new copy and reopen it to check the result.
- If you cannot use 'Fill & Sign', print the form and complete it by hand, scan (or photograph) and email.

Printing a PDF form

- Choose the correct paper size, some forms are set up for US Letter size and not A4.
- Check Print Preview before printing.
- Make sure 'Fit to page' or scaling does not hide boxes or instructions.
- If the form has a barcode or reference number, do not crop it.
- Keep a copy of what you submitted.

Scanning or photographing a completed form

- Use good lighting and keep the phone or camera directly above the page.
- Include all four edges of the page.
- Check that every page is readable before sending.
- PDF is usually preferable to a collection of separate photos.
 - Use file-> Print to turn a JPEG photo into a PDF
 - Use PDFSAM on PC or Mac to merge multiple PDFs
- Avoid sending unnecessarily large files if the recipient gives a size limit. There are many on-line tools that reduce the size of a PDF e.g. <https://smallpdf.com>

Emailing the completed form - check before you send!

- Check the recipient address carefully.
- Check the attachment is the completed version, not the blank original.
- Open the attachment once more before sending.
- Remove unrelated personal documents from the email.
- If the information is sensitive, use the organisation's secure upload system when available.

Practice exercise

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Edit the sample PDF and email it to me

- The sample PDF was sent in an email earlier in the week, or it can be found on our web site
- PC or Mac, save the example form on your device then open it with Adobe reader.
- Tablet/phone, just click on the attachment

Troubleshooting checklist

- Can you click into the field? → Try Tab.
- Can you type but not save? → Use Save As and reopen.
- The form looks like a picture? → It may not be fillable.
- The text is tiny or cut off? → The field may have a character limit.
- The signature is rejected? → Check the organisation's instructions.
- Still stuck? → Ask the organisation for an alternative way to submit it.

Seven habits that make PDF forms easier

1. Keep the blank original

Work on a copy.

2. Save early

Don't wait until the end.

3. Reopen

Check your saved copy.

4. Read instructions

Especially dates and signatures.

5. Protect data

Verify who will receive it.

6. Keep evidence

Save a copy of what you sent.

7. Don't panic

There is usually another way.