Creating a fillable PDF form in Word

Word can be used to create a fillable PDF form to gather information. A form saved as a PDF protects the integrity of your document. This form can be shared quickly for others to complete. There are two ways to create a fillable form in Word; by using the predefined Form templates or by using the Developer Tab where specific form controls are used to insert the fillable fields.

USING THE FORM TEMPLATES IN WORD

The **quickest and easiest way is to use a form template already created in Word** and then update the fields that you will need. Fields can be changed or deleted with the text needed for your form. This form is then saved as a .pdf and then this form can be opened in Adobe Reader and the recipient can click and complete the fields.

1. Open Word and then click **File→New**

2. Type **Forms** in the "Search for online templates" line and press **Enter**.

3. Click once on a form and then click **Create**.

4. Make changes to the fields.

5. Click **File→Save As**

6. **Name the form** and **save this as a .pdf** file

OPEN AND TEST THE FORM IN ADOBE ACROBAT READER

Any newly created form should be tested in Adobe Acrobat Reader.

1. Open the .pdf form in Adobe Acrobat Reader.

2. Click the [Fill & Sign] **Fill & Sign** option from the right panel.

3. Click in a field and begin typing.

ADD THE DEVELOPER TAB

The **Developer Tab** has all the form controls needed to create a form from scratch in Word.

1. Click **File →**
   Options→click **Customize Ribbon** on the left→ **check Developer** under Customize the Ribbon on right side.
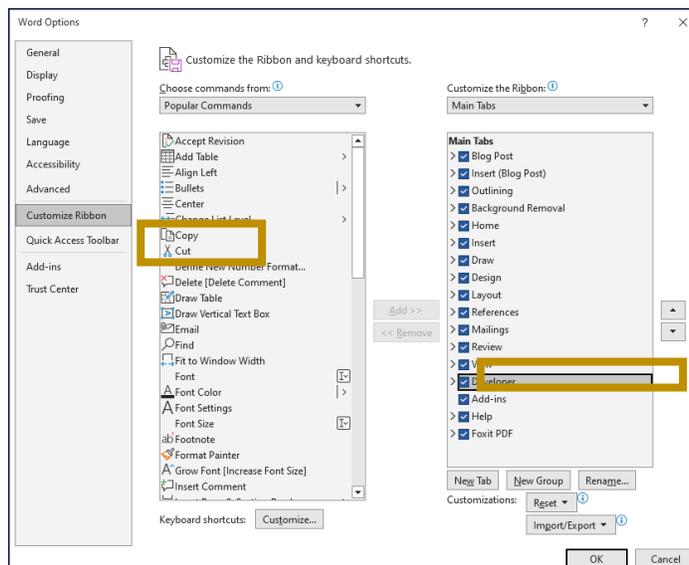
2. Click **OK**.

After adding the Developer Tab, you will use the content controls to build the form.

1. **Create** your **form**.

2. **Click to the right of the field** where you want to begin to create your form.

3. Click the **Developer tab**.

    EXAMPLE:

Student Registration Form

Firstname:	
Lastname:	
DOB:	
Address1:	
Address2:	
City:	
State:	
Country:	

4. Click **Design Mode** [Design Mode] under the Controls area.

There are various Design Modes to choose from.
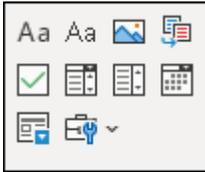
Types of Form Controls

Form Content Controls		
Aa	Rich Text	A text input field that allows for rich text formatting.
Aa	Plain Text	A text field limited to plain text, so no formatting can be included.
🖼	Picture	Accepts a single picture.
🔖	Building Block Gallery	Shows a gallery of formatted design choices from the Quick Parts gallery.
📑	Combo Box	Creates a list that users can edit directly.
📑	Drop-Down List	Users choose from several selections that appear by clicking the list arrow.
📅	Date Picker	Users select a date and the control automatically formats the date's appearance.
☑	Check Box	Inserts a check box into a form.
🧰	Legacy Tools	Contains the form controls from previous versions of Word.

From website: https://www.customguide.com/word/how-to-create-a-fillable-form-in-word

5. **Adding plain text** to Firstname:

In the example below, click to the right of Firstname: and then click the plain text button Aa .

-You can add a description of what you want them to type into the field.

Firstname:	Type your firstname
Lastname:	
DOB:	

6. **Adding plain text** to Firstname:
In the example below click to the right of Firstname: and then click the plain text button Aa .

-You can add a description of what you want them to type into the field.

Firstname:	Type your firstname
Lastname:	
DOB:	

7. Once all the design controls are added, click the **Design mode button again to turn off** Design Mode. **NOTE**: When Design Mode is off you cannot add any more design controls.

FINALIZE THE FORM

Before sending the form out to others, you should restrict editing the document otherwise those who are going to fill this out could edit the form themselves.

1. Click the **Restrict Editing** button

The Restrict Editing pane appears on the right.

2. Click the check box under Editing restrictions area.

2. Editing restrictions
☐ Allow only this type of editing in the document:
No changes (Read only) ▾

Exceptions (optional)
Select parts of the document and choose users who are allowed to freely edit them.
Groups:
☐ Everyone

⮂ More users...
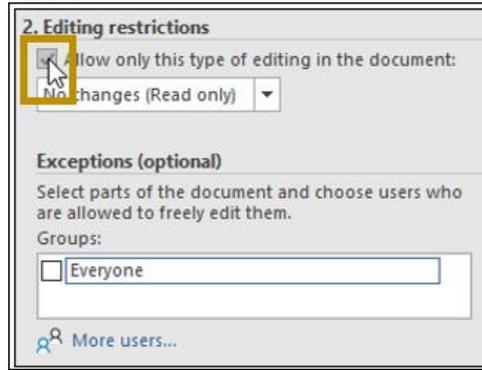
3. **Click the drop-down** and choose **Filling in form**. This will prevent any edits to the document.

2. Editing restrictions
☑ Allow only this type of editing in the document:
No changes (Read only) ▾
Tracked changes
Comments
Filling in forms
No changes (Read only)
and choose users who are allowed to freely edit them.
Groups:
☐ Everyone

⮂ More users...
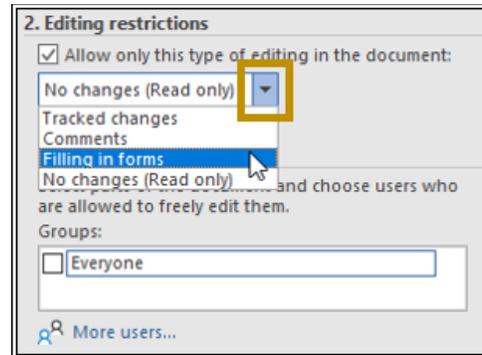
4. Then click "**Yes, Start Enforcing Protection**".

Restrict Editing ⌄ ✕

1. Formatting restrictions
☐ Limit formatting to a selection of styles
Settings...

2. Editing restrictions
☑ Allow only this type of editing in the document:
Filling in forms ▾

3. Start enforcement
Are you ready to apply these settings? (You can turn them off later)
Yes, Start Enforcing Protection
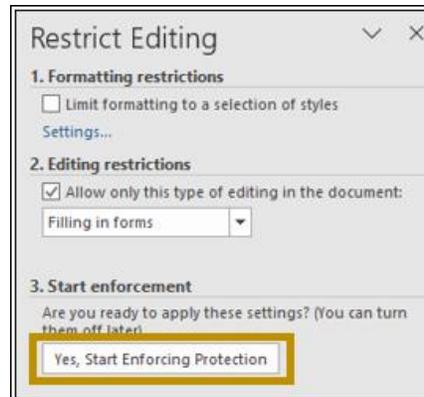
5. If you want to lock a document, **enter a password here**. If not, just click **OK**.

Start Enforcing Protection ? ✕

Protection method
◉ Password
(The document is not encrypted. Malicious users can edit the file and remove the password.)
Enter new password (optional): |
Reenter password to confirm:
○ User authentication
(Authenticated owners can remove document protection. The document is encrypted and Restricted Access is enabled.)
OK   Cancel

The document is now restricted and anyone you send it to will only be able to fill in the form.