

Introduction to Accessible PDF Forms

Approaching Forms

Choose the approach that works best for your situation. No one way works best every time.

1. Considerations:

- Are you working with the original source document?
- Has the PDF been tagged and was there a lot of remediation work done?
- Are the form fields well defined?
- add form fields and then tag or add form fields to the tagged PDF

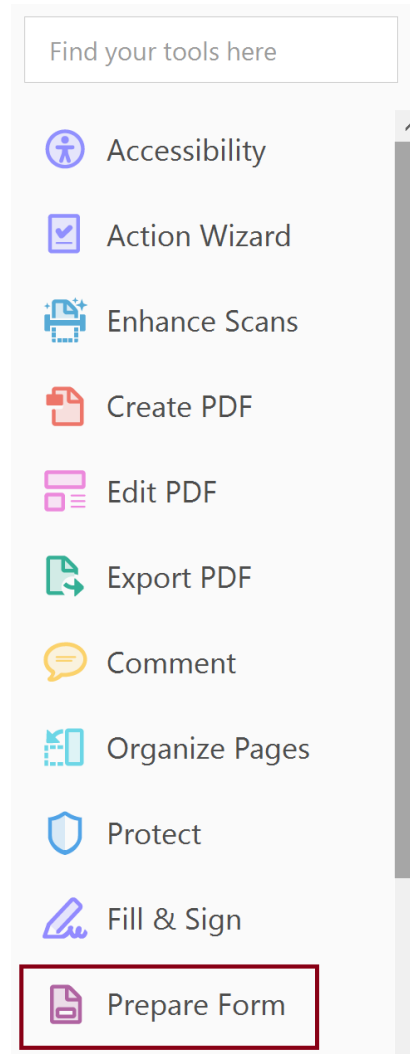
2. Options

- Auto detect the form fields before tagging or auto tagging (may require less remediation in the Tag Tree). Note that auto tagging will remove all styles and alt-text.
- Auto detect the form fields after tagging (similar to manual process but may save time)
- Manually add the form fields (requires the most work)

3. Regardless of approach use the Prepare Form tool in Tools Pane

Prepare Form Tool

- Added by default to the Tools Pane



Select a Form

- Choose document, if you open the document in Acrobat first it is a simple step.
- Do not check “This document requires signatures”, signature field applied regardless
 - Some functionality missing in Properties dialog (a bug?)
- Choose whether to auto-generate form fields or not. Usually yes.

Select a file or scan a document to begin



Form Sample Simpl...

[Change File](#)



Scan a document

This document requires signatures

Start

Form field auto detection is ON. [Change](#)

Categories:

- Commenting
- Documents
- Full Screen
- General
- Page Display
- 3D & Multimedia
- Accessibility
- Action Wizard
- Adobe Online Services
- Catalog
- Color Management

General

- Automatically calculate field values
- Automatically adjust tab order when modifying fields
- Show focus rectangle
- Show text field overflow indicator
- Show field preview when creating or editing form fields
- Automatically detect Form fields

Highlight Color

Layout of the Prepare Form Tool Functions

The screenshot displays the 'Prepare Form' tool interface. At the top, a toolbar contains several icons, with a red box highlighting the 'Text', 'Checkmark', 'Circle', 'List', 'Form', 'OK', 'Image', 'Calendar', 'Pen', and 'Barcode' icons. Below the toolbar, the main workspace is labeled 'Manually Add Form Fields' in red text. To the right, a blue box highlights a panel of alignment and distribution options, including 'ALIGN', 'CENTER', 'MATCH SIZE', and 'DISTRIBUTE'. Below this panel is a 'More' button with a wrench icon. At the bottom right, a purple box highlights a 'FIELDS' panel showing a list of form fields: 'Page 1', 'Donor Informaon please', 'Billing address', 'City ST Zip Code', and 'Phone 1 Phone 2'. A blue text label 'Position Form Fields' is placed in the center of the workspace.

Prepare Form ▾

Manually Add Form Fields

Position Form Fields

ALIGN **CENTER**

MATCH SIZE **DISTRIBUTE**

More

FIELDS

- Page 1
 - Donor Informaon please
 - Billing address
 - City ST Zip Code
 - Phone 1 Phone 2

Accessing the Form Field Properties

Select Form Field

Donor Information (please print or type)

Name

Donor Informaon please print or type

Billing address

Billing address

City, ST Zip Code

City ST Zip Code

Phone 1 | Phone 2

Phone 1 Phone 2 1

Fax | Email

Phone 1 Phone 2 2

Right Click and Select Properties

Properties...

Rename Field...

Set as Required Field



Add New Field

Cut

Ctrl+X

Copy

Ctrl+C

Delete

Key Field Properties

Text Field Properties

Text Field Properties

General Appearance Position Options Actions Format Validate Ca

Name: Donor Informaon please print or type

Tooltip: Donor Informaon (please print or type)

Common Properties

Form Field: Visible Read Only

Orientation: 0 degrees Required

Locked Close

Text Field Properties

Text Field Properties

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

Select format category: Date

Date Options

- m/d
- m/d/yy
- m/d/yyyy
- mm/dd/yy
- mm/dd/yyyy
- mm/yy
- mm/yyyy

Example of current format: 3/4/18

Use the Date format category to display only the date or both date and time values. Use the Time format category to display only the time.

Locked Close

Auto Detection of PDF Form Fields

Steps for Adding Form Fields with Auto Detection

1. Run “Prepare Form”
2. Fix form field properties (name and tooltip)
3. Check other properties
4. Add format to fields if important
5. Or select ID Form Fields from the accessibility Tools

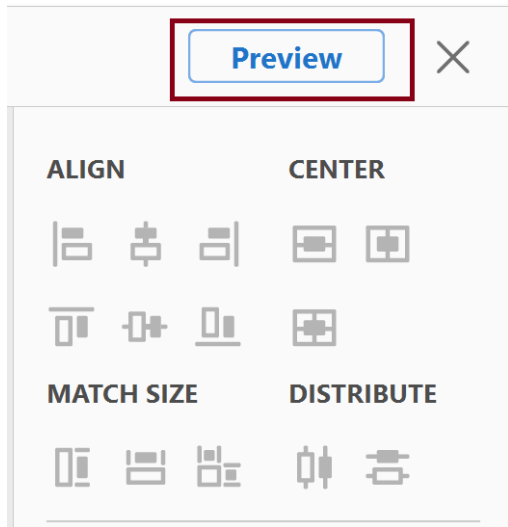
Finalizing the Form

Steps to Finalize the Form

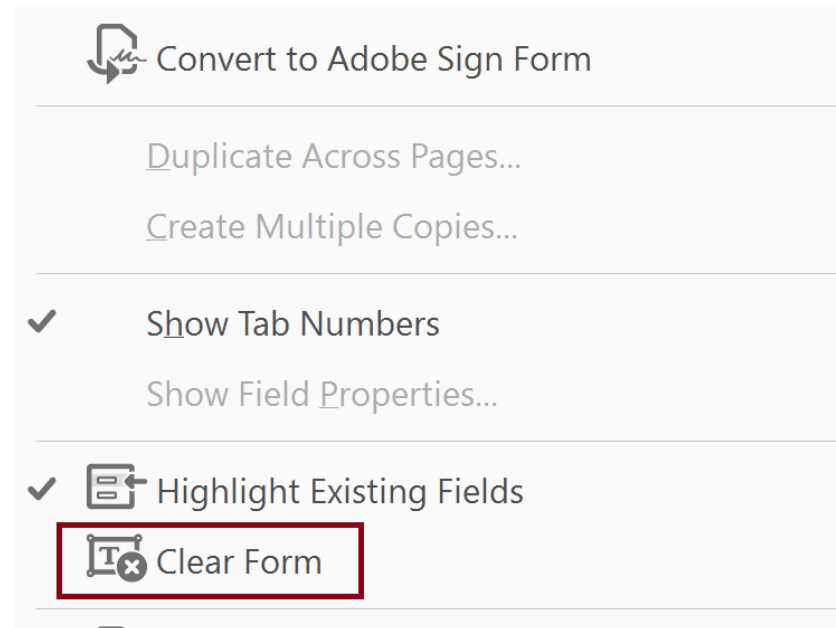
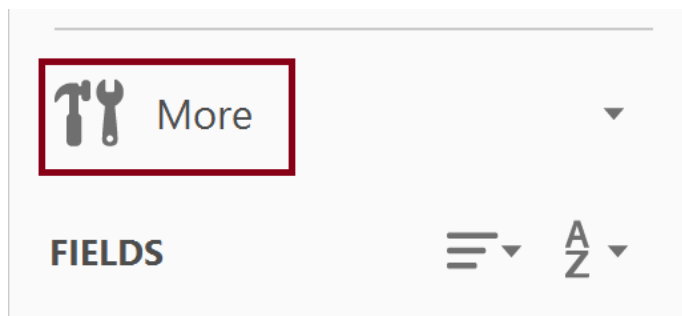
1. Verify and fix tab order
2. Test the form
 - Preview the form
 - Verify entering data in the fields
3. Tag or Auto-tag the form and fix the Tag Tree

Testing the Form

Select Preview (toggles back to Edit)



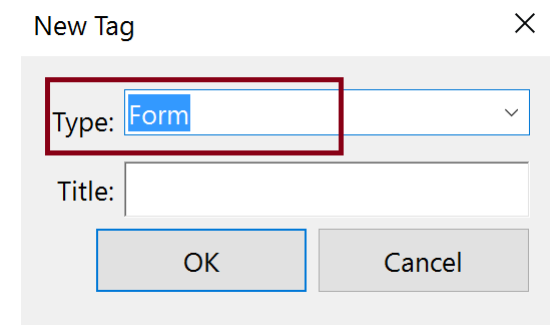
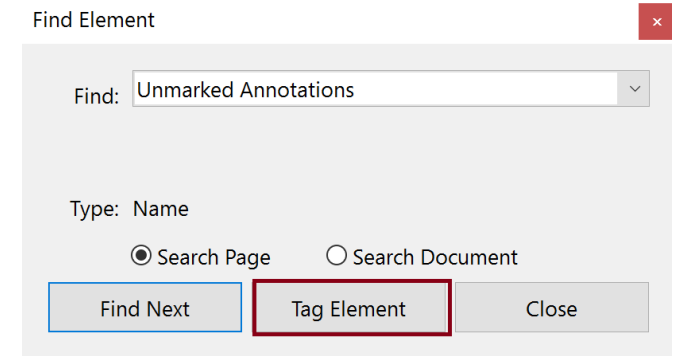
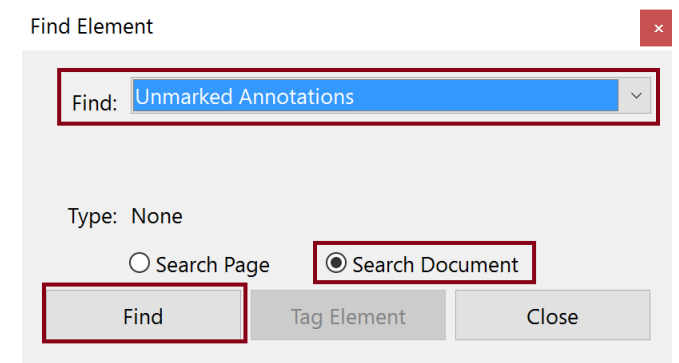
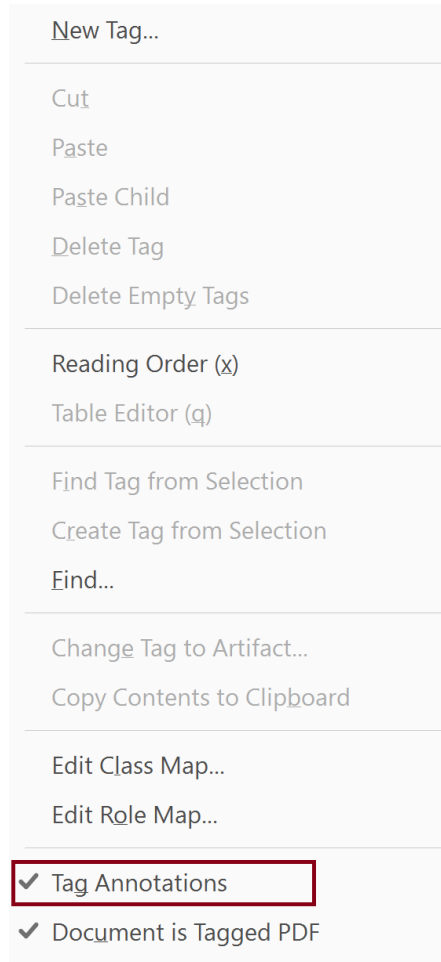
Clear the form after entering data in the form fields



Manually Adding Form Fields to the Tag Tree

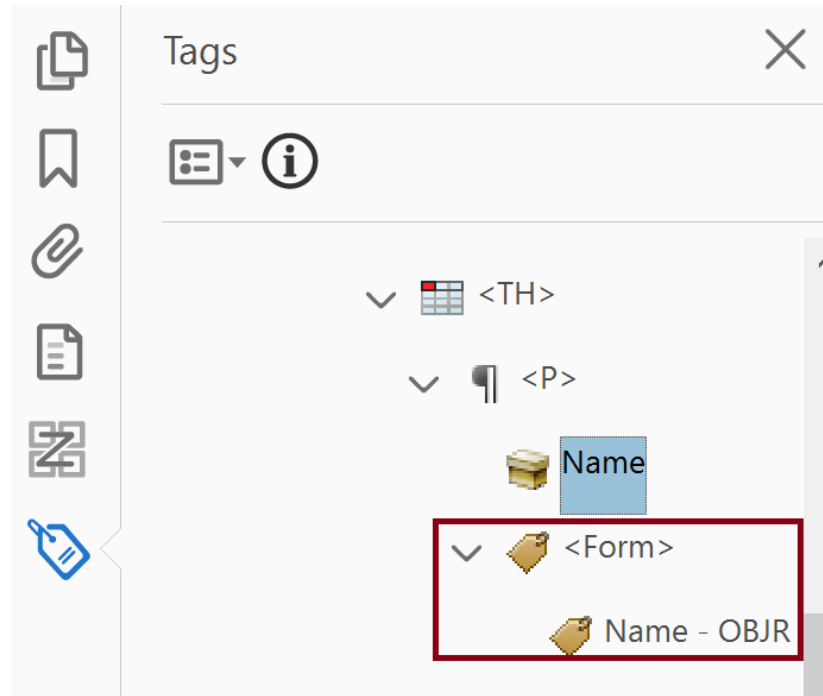
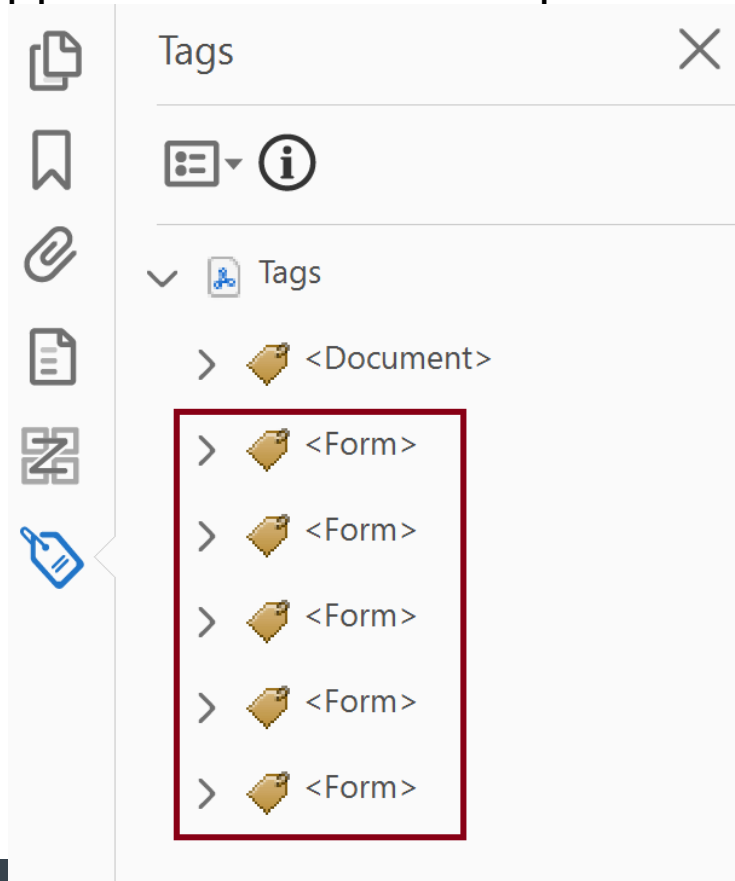
Steps

- Place focus where you want Form tag to go.
- Tag Annotations
- Find Unmarked Annotations
- Tag Element
- Set Tag Type to Form
- Create New Form Tag



Fix Tag Tree

- Form fields appear in New Form Field you just created.
- Move <Form> tag to the correct place in the Tag Tree as a peer of the <P> tag content.
- For each form field, there is a <Form> tag with a nested Field Name- OBJR tag. The <Form> tag appears after and as a peer of the tag containing the text label of the field.



Manual Creation of Form Fields

Adding Form Field Manually

- When to manually add form fields
 - Creating a form from scratch
 - Adding/fixing form fields where form fields were auto detected
- Steps
 - Prepare Form
 - Manually place form fields
 - Complete process for creating and finalizing forms in auto detect process except for tagging
 - Tag form fields manually
 - Note: form fields may appear at the end of the Tag Tree and need to be moved

Multiple Form Field Options

The screenshot displays a software interface for creating forms. At the top, a toolbar contains icons for adding different field types: text, checkbox, radio button, list, calendar, signature, and barcode. A red box highlights the first six icons, with the text "Manually Add Form Fields" written below them. On the left, a sidebar lists "Common Fields" including Text, Checkbox, Radio Button, Lists, Calendar, and Signature. On the right, a panel titled "Position Form Fields" contains alignment and distribution tools, with a blue box around them. Below this, a "More" button is visible. At the bottom right, a "FIELDS" panel shows a list of form elements on "Page 1", including "Donor Informaon please", "Billing address", "City ST Zip Code", and "Phone 1 Phone 2". A purple box highlights this list, with the text "Set Tab Order" written next to it. The top of the interface includes a "Prepare Form" menu, a "Preview" button, and a close button.

Prepare Form ▾

Manually Add Form Fields

Common Fields

- Text
- Checkbox
- Radio Button
- Lists
- Calendar
- Signature

Position Form Fields

Set Tab Order

Align **Center**

Match Size **Distribute**

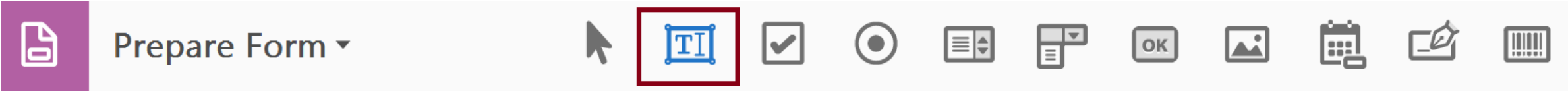
More

FIELDS

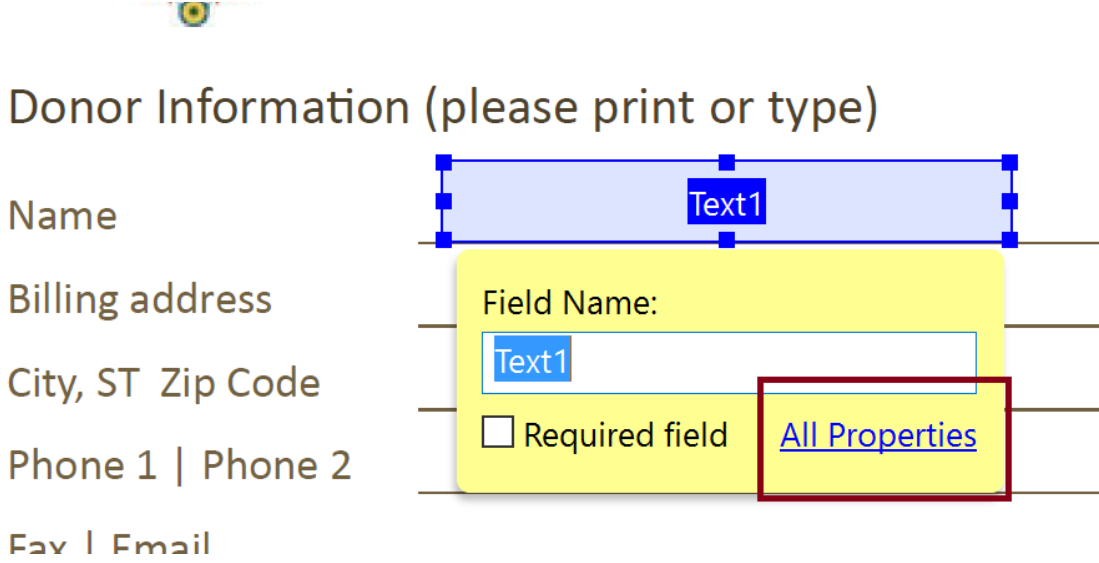
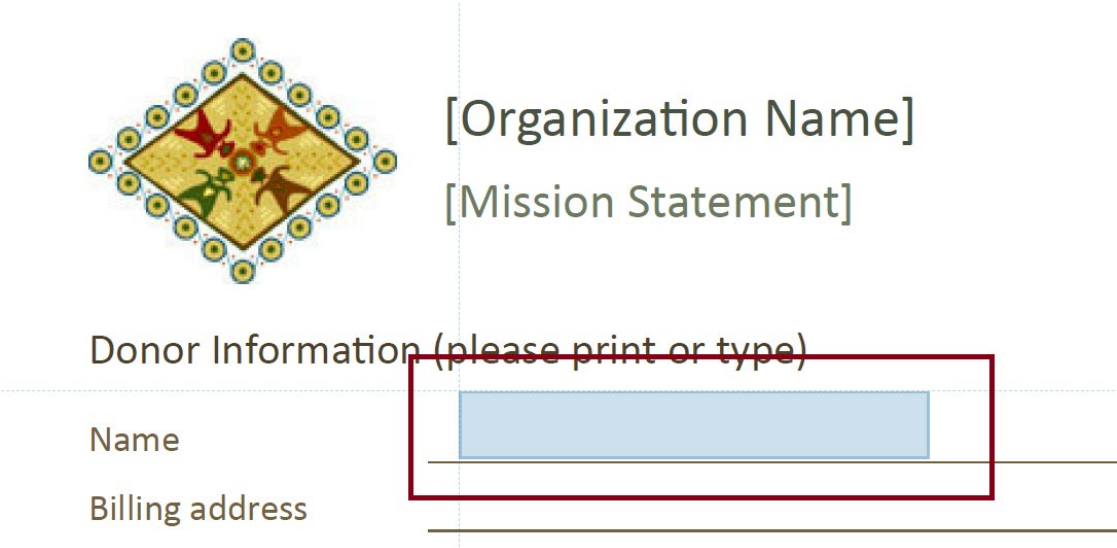
- ✓ Page 1
 - Text Donor Informaon please
 - Text Billing address
 - Text City ST Zip Code
 - Text Phone 1 Phone 2

Add a Form Field (Text)

Select form field type (Text)

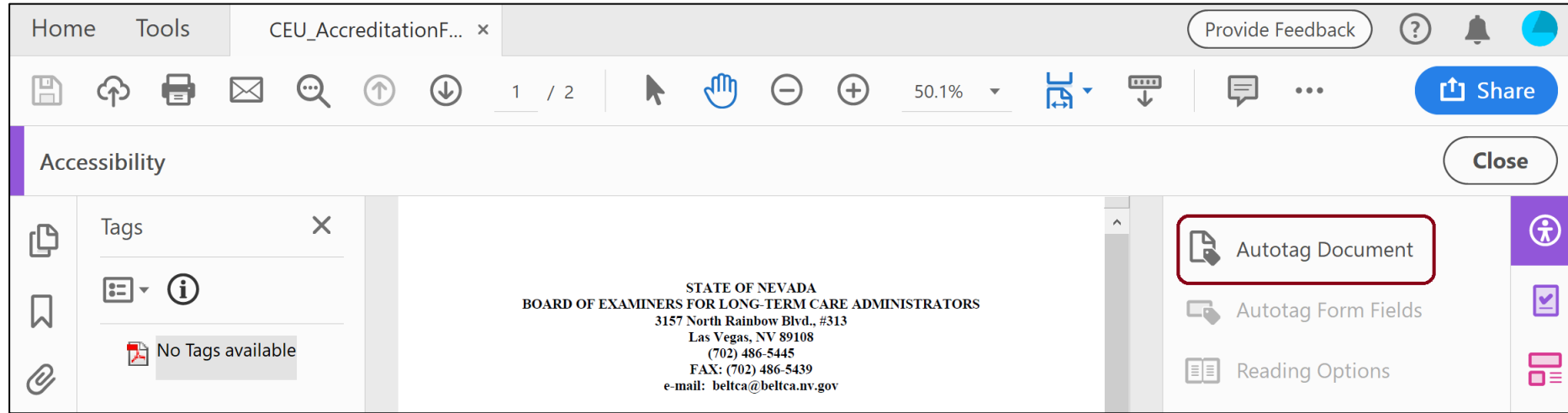


Drag/Drop form field in place and edit properties



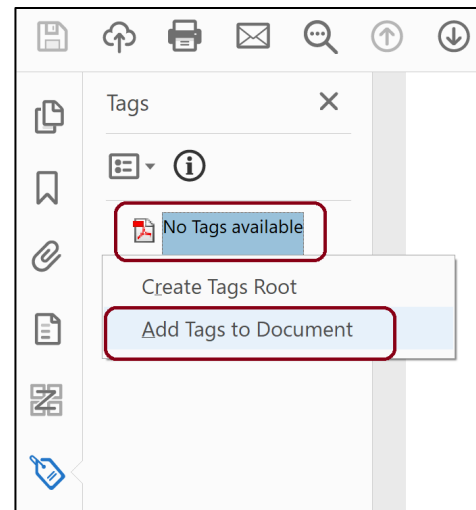
Autotag Form

Accessibility Tool > Autotag Document



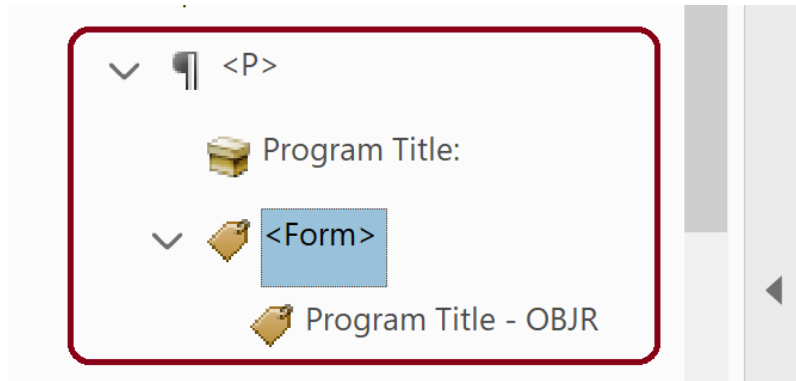
Tag Tree

- Put focus on No Tags Available
- Right click for context menu
- Select “Add Tags to Document”



Edit Tag Tree

- Fix and move <Form> tags (as necessary) so that they have the following format:



By Sponsoring Organization

Program Title:			
Date:		Time:	
Location:			
Number of Contact Hours Requested:		Ethics	
		Regulations	

“Special” Form Fields

Multi-line Text Box

- Regular Text field
- Size to space for text
- Go to Text Field Properties > Options > Multi-line
- Scroll long text
- Limit of “x” characters
- Notes:
 - Characters, not words
 - 500 words is approximately 3000 characters
 - Spaces count as characters
 - Even if visually there are multiple lines only create one text box

Text Field Properties

General Appearance Position Options Actions Format Vali

Alignment: Left

Default Value:

Field is used for file selection

Password

Check spelling

Multi-line

Scroll long text

Allow Rich Text Formatting

Limit of 1000 characters

Comb of 0 characters

Locked

Close

Check Box



Prepare Form ▾



- Select Check Box
- Select “Pin” to create multiple check boxes
- Set Name and Tooltip
- Set Options
 - Check Box Style
 - Export Value

Check Box Properties

Check Box Properties

General Appearance Position Options Actions

Check Box Style:

Export Value:

Check box is checked by default

Check boxes should be used to create lists of items where zero or more items can be selected at once. To make a list of items where only one item can be selected, use radio button fields.

Locked Close

Radio Button



Prepare Form ▾



- Select Radio Button
- Create Choice – unique to the radio button
- Add Group Name – common to the set of radio buttons (also the Name in the properties)
- Add Another Button – until all buttons are created
- Select All Properties
 - Set Tooltip
 - Set Options
 - Button Style
 - Verify Radio Button Choice

Radio Button Properties

Dropdown List Box



Prepare Form ▾



- Select Dropdown List
- Set Name and Tooltip
- Set Options
 - Add Items to select Item List
 - Export Value

Dropdown Properties

Dropdown Properties

General Appearance Position Options Actions Format Vali ◀ ▶

Item: poor Add

Export Value:

Item List: excellent
good
average

Delete

Up

Down