Map a PDF to a Form

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About

You can map a PDF to a Form in NextStep by utilizing Adobe Pro. This can be used for items such as state-specific forms.

Map a PDF to a Form

1. Create the Form based on the PDF you would like to map from by following the **Forms QRG**.

> 📌 **Note**: You **must** enter a Form Alias, as the alias will be used in the steps below.

2. After the Form is created, open **Adobe Pro DC**.
3. Navigate to **Tools** and find the tool called **Prepare Form**.
4. Click **Open**.
5. Select the file that you want.
6. Click **Start**.
7. Determine which type of field you will need to create a field for on your PDF form.

> 📌 **Note**: If you need to pull a field from the Face Sheet, that will be addressed in Step 9.

8. Use the information below to create fields for text, memo, date, select one, select all that apply, drop-down, and chart fixed rows fields:

   - **Text, Memo, Date, & Drop-down:**
     a. Select **Add a Text Field** [T] to create a field for the corresponding field on your form.
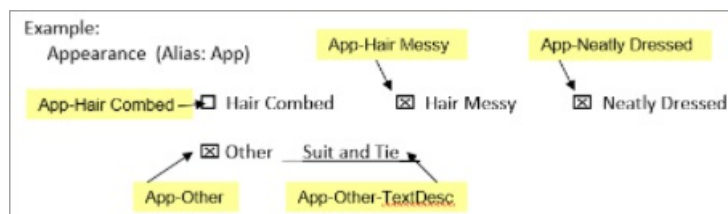   b. Enter the **Field Alias** name from your NSS site into the name field.

> 📌 **Note**: The drop-down choices will be pulled in as if they were text.

   - **Select One & Select All that Apply:**
     a. Select **Add Checkboxes to Enable Selection from One or More Options** [✔] to create a field for the corresponding fields on your form.
     b. Enter the **Field Alias** name dash-the choice (e.g.: Alias-Choice). If there is a text descriptor then you will need to enter as Alias-Choice-TextDesc after selecting **Add a Text Field** [T] .

> 📌 **Note**: You must set the export value to "yes" (lowercase) for Select-all and Select-one. In Adobe, you need to right-click on your field and go to properties. Under the Options tab, you will see Export Value. By default, the value is Yes. The capital Y will cause it to not work, as it is case-sensitive.

Example:
Appearance (Alias: App)
App-Hair Messy
App-Neatly Dressed
App-Hair Combed —[☐] Hair Combed   [☒] Hair Messy   [☒] Neatly Dressed
[☒] Other   Suit and Tie
App-Other   App-Other-TextDesc

   - **Chart Fixed Rows:**
     a. Select **Add a Text Field** [T] to create a field for each cell in your chart. Each cell in the table has a field name that will incorporate the chart's alias name.

b. For example, the layout will be as follows for a Fixed Chart field which has 3 rows and 4 columns. Each cell from the chart will have the FieldAlias name concatenated with a cell number. The first cell is always Column 1-Row 1, the second cell is Column 2-Row 1, etc.

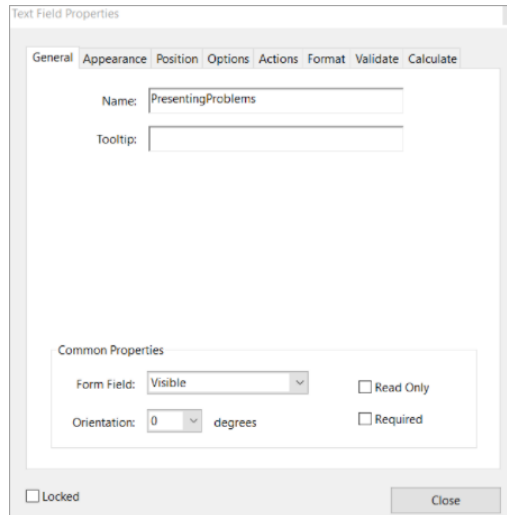|			
FieldAlias_1-1	FieldAlias_2-1	FieldAlias_3-1	FieldAlias_4-1
FieldAlias_1-2	FieldAlias_2-2	FieldAlias_3-2	FieldAlias_4-2
FieldAlias_1-3	FieldAlias_2-3	FieldAlias_3-3	FieldAlias_4-3

- **Signature:**

  a. To add a signature, click **OK** [OK] . Add the Field Alias into the field name.

9. If there are fields on the Face Sheet that you would like mapped to your PDF, use the **Add a Text Field** [T] and use the chart below to determine the appropriate Alias.

PDF Form Field Name	Description	Example
FullName	Complete name, first, middle, and last name	Robert Thomas Test
Name	Name without middle name	Robert Test
FirstName	First Name only	Robert
LastName	Last Name only	Test
Address	House number and street	123 Easy Street
City	City	Rochester
State	State	MI
Zipcode	Zip Code	48307
AddressCSZ	City, State, Zip Code in one line with punctuation	Rochester, MI 48307
HomePhone	Home phone number	###-###-####
WorkPhone	Work (Business) phone number	###-###-####
CellPhone	Cell phone number	###-###-####
BirthDate	Birth date	12/10/1975
ClientRefNo	Client Reference Number (external case number)	V-45446
CaseNo	NextStep Case Number	435-1
SSN	Social Security Number	123-65-3456
XSSN	Protected Social Security Number, only the last 4 digits are displayed	XXX-XX-3456

10. To edit the properties of any field, you would do so under the text field properties in Adobe Acrobat for that specific field. Within this window, there are 8 tabs. The most used tabs are listed below:

- **General:** contains the Field Alias from NSS Clinical
- **Appearance:** customize borders, colors, font size, and font
- **Position:** changes the size and shape of the text or checkbox field
- **Options:** change alignment, field options, and export value

11. Once the PDF has been mapped, click **File > Save-As**.
12. Navigate to the open Form in NSS Clinical.
13. Select the **Add a PDF Print Template** button.

14. Enter the **Print Template Name**, and click the **Upload/Change Document button**.
15. Click the **Browse** button to locate and select the PDF file.

16. Click **Upload** and then the **Update** button.
17. The PDF is now attached to the Form.

Notes:
- To test how this looks, go to a test client and complete the Form. Once completed, you can seal or save then open as a PDF format.

- To remove the PDF, go back to Form Builder, find the form, then click the **Remove the PDF Print Template** button.