

Using Adobe fillable portable document files (PDF's) for workshop documentation.

PDF's are ok to use with de-identified surveys.

You need at least the latest version of Adobe Acrobat Reader to use the forms. **Software** is free. Most people already have it on their laptops. Here's the site:

<https://get.adobe.com/reader/otherversions/>

There are many ways to **manage the paperwork**. It would be helpful to set up a folder for each workshop in advance to store all the completed forms.

- With Adobe Acrobat DC Pro you can collect the forms in a portfolio.
- Office 365 has good encryption features.
- Use your favorite zip file app (with or without password).
- Or physically print-out forms and fill in by hand, then scan as a group and e-mail to healthyagingncinfo@gmail.com. If you scan hard copy forms, remember to capture both sides of the survey.
- However you choose to transmit the forms, remember to include cover sheet, attendance sheet and first and last (if applicable) surveys for each participant.

Steps for **filling, saving and printing surveys**. Remember you must at least have Adobe Reader to accomplish this process.

- Go to **Program Forms** on Healthy Aging NC <https://healthyagingnc.com/program-forms/> (When the new website look launches soon, this link may change.)
- Select desired form, click on the form link, click download icon in top bar of pdf screen.



- The form will default to your Downloads file. Use 'Save As' to rename file and save to your forms folder that you set up earlier. **Hint:** Use the initial blank saved forms as master copies.
- Pull up your master copy. Click and fill in participant info. Remember to label the survey at the top what program type it is (Chronic Disease, Chronic Pain, Diabetes, Tai Chi, etc.) Use Save As to your workshop forms folder using your own naming convention.
- Circles on the surveys give one choice only. Check boxes allow all that apply. Tai Chi attendance form has an auto tally column, no need to add up the attendance checks.
- For the next survey, pull up master again, fill in info for next participant, Save As to folder with new name, repeat for every participant with attendance.

Buttons at the bottom of the forms are for printing (saving as pdf) and resetting the forms.

- Printing – save form as a pdf or send to your in-house physical printer or cloud drive.
- Reset buttons – If necessary, you can reset the whole page.