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# How to Use Your Forms + Workflow Starter Guide

A plain-English guide for using ready-made fillable PDFs, editable documents and templates in your own business — on your own computer or on a form platform you choose.

## 1. Fillable PDFs: the basics

- Open fillable PDFs in **Adobe Acrobat Reader** (free) for the most reliable typing, checkboxes and saving. Some browser viewers do not save filled fields.
- Keep one untouched **master copy**. Use “Save As” for each filled copy, e.g. *2026-10-Intake-Smith.pdf*.
- To share a blank form, send the master file or a link to it. To share a filled form, send only to the person who needs it.
- On phones and tablets, use the Acrobat Reader app; built-in previews may not show fields.

## 2. Editable documents and templates

- Open editable documents in the program they were made for (for example Word, Google Docs or Canva).
- Replace placeholder text and logos, then export a PDF for anything you send to customers.
- If you rebuild a form on an online form platform, copy the questions over and test it yourself before sharing the link.

## 3. Simple setup in five steps

- **Save** the file in a dedicated folder, e.g. *Forms / Masters*.
- **Brand** it: add your business name and contact email where provided.
- **Test** it: fill a sample copy with fake details and check every field.
- **Share** it: email, a link from your website, or printed copies.
- **Collect** it: decide where completed copies are saved and who reviews them.

## 4. Review and approval

- Name one person responsible for checking each completed form.
- Add a short status to the file name or a tracking sheet: *Received → Reviewed → Approved → Filed*.

- For signatures, use a reputable e-signature tool or a printed signature — a typed name may not be enough for every purpose.

## 5. Storage and versioning

- Use folders such as *Masters*, *In progress* and *Completed*.
- When you change a form, save it as a new version (v1, v2) and note the date. Retire old versions so nobody uses them.
- Back up completed forms, and limit folder access to the people who need it.
- Delete records you no longer need, following any rules that apply to your business.

## 6. Sample workflows

**Client intake**

- Send the intake form link or file before the first appointment.
- Client returns it by email or upload.
- Review answers, note follow-ups, file in Completed / Clients.

**Office new hire**

- Send the onboarding packet (info form, checklist, policy acknowledgements).
- New hire returns completed pages; manager reviews.
- Track each item on a checklist; store in a restricted folder.

**Approvals**

- Requester fills the request form (purchase, time off, change).
- Approver reviews, marks approved/declined, signs and dates.
- Save the final copy and tell the requester the result.

**Checklists**

- Copy the master checklist for each job, day or project.
- Tick items as they are completed and note the date.
- File the finished checklist so you have a simple record.

## 7. Basic privacy caution

- Only ask for information you actually need.
- Ordinary email, shared drives and standard PDFs are **not** automatically secure or HIPAA-compliant. Do not use them to collect protected health information, payment card numbers or other sensitive data unless your setup has been properly secured and the required agreements are in place.
- Healthcare practices: collecting patient information requires a platform that supports it, signed Business Associate Agreements where required, correct access settings and verified handling *before* any patient data is collected.
- This guide is general information, not legal, compliance or medical advice.

## Want it done for you?

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