

CALS Business Services

PDF Editable Forms Guidance

When submitting information to create a supplier record for a ShopUW+ a payment request that includes confidential information, such as a W9, email an encrypted PDF to calsfs@cals.wisc.edu

Fillable, or editable, forms are often a part of this supplier creation process. Some forms, such as the [IRS W9](#), must be made non-editable, or flattened, after being filled in. To do this, rather than selecting Save or Save As, choose Print to PDF.

Open the document (PDF) in Adobe Acrobat before filling in the fields and fill the form out.

Next, choose *Print* and Adobe PDF (or, Print to PDF), and select the location you would like it saved to. While converting the document through Print, the document will be flattened – no longer editable.

Some forms, however, should remain editable. These include any that require another editor or signer – such as the Official Functions Form. With these forms, fill in the sections needed, then choose *Save As* and name the document that way. As a result, it will still be editable by the next person.