Managing Forms

Administrators can import forms into PinPoint as editable PDF's at any time. These forms can then be completed from the File Single Document screen while using Internet Explorer.

- 1. First, create your form using an external PDF creator. Adobe is an example.
- 2. Select the Document Type this form applies to.
- 3. Give the form a Name.
- 4. Click Browse and upload the form from your workstation.
- 5. Click Save.



To fill out a form (must be using Internet Explorer and have the PDFXViewer installed and have the PDF Tools enabled in your profile):

- 1. Go to Menu > Filing > Single Document
- 2. First, select the Document Type that you uploaded the form to.
- 3. Click the Fx icon above the Document Name field, then click the clipboard icon next to Forms.
- 4. Select the Form you'd like to open and the form will appear in the document view, and is able to be completed.
- 5. Once you have completed the form, finish completing the other document details for filing, then click Save.

