

PDF TIPS and TROUBLESHOOTING For Conflict of Interest (COI) Forms

Purpose

This document provides instructions for how to complete fillable PDF COI forms for both Windows and Mac computers.

Requirements

- Adobe Acrobat Pro (7.0 or above) or Adobe Acrobat Reader (8.1.2 or newer)
- Mac users must install Adobe Acrobat/Reader. Mac Preview **will not work** with fillable PDF forms. Please check to see what your Mac is using to open the form.
- Do not attempt to complete fillable forms within your internet browser.

Tips for Downloading and Saving Fillable PDFs from an Email Attachment

Save the form to your computer before completing it

You must download or save the PDF form to your computer or network drive first and then open it with Adobe Reader or Adobe Acrobat to complete it. You can save your data and re-open the file later to modify or enter additional information.

Use the latest version of Adobe Reader

To open and complete the PDF forms, you will need Adobe Reader (the latest version is recommended). If you do not have it installed on your computer, you may download the latest version free of charge from <http://get.adobe.com/reader/otherversions>.

Mac users: do not use Preview

For Macintosh system users: DO NOT use the Preview program to complete the PDF form. Adobe Reader is the only program that will allow you to complete the form and display the content properly. If you do not already have Adobe Reader, download the latest version free of charge from <http://get.adobe.com/reader/otherversions>.

Tips for Downloading and Saving Fillable PDFs from the COI Website

Windows users:

Save the form to your computer before attempting to complete it

Fillable PDF forms may be completed and saved using **Adobe Acrobat Reader** (this software must be loaded on your computer). To accomplish this, you must always first save the blank form on your own computer.

1. Position your cursor on the form link from the COI website <http://blink.ucsd.edu/sponsor/coi/forms.html> and click with your **right mouse button** (do not activate the link and open the form)

2. For Internet Explorer select: **Save target as**
3. For Chrome and Firefox select: **Save link as**
4. Select the location on your own computer or network and click on the **Save** button
5. Once saved, open the form from the saved location on your computer

Mac users:

Save the form to your computer before attempting to complete it

1. Position your cursor on the form link from the COI website <http://blink.ucsd.edu/sponsor/coi/forms.html> and press and hold the **Control (Ctrl)** key while you click with your **mouse button**
2. If using Safari select: **Download Linked**
3. If using Internet Explorer select: **Save target as**
4. If using Chrome and Firefox select: **Save link as**
5. Select the location on your own computer or network and click on the **Save** button
6. Once saved, open the form from the saved location on your computer

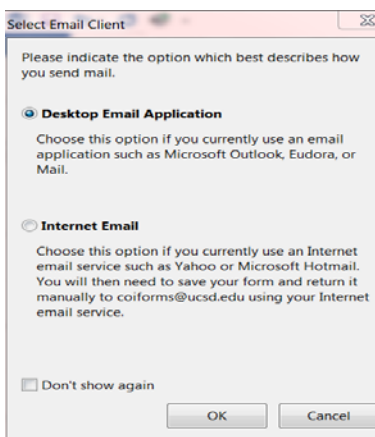
Tips for Completing Fillable PDFs

1. Use the Adobe Acrobat Reader to open the blank PDF form that you saved on your own computer or network
2. Complete the form. You can either type information directly into each field, or copy or paste text. The font is preselected and cannot be changed. You can only type regular text (upper and lower cases); the system will not accept underlined text, bold or italics, script or formulas, curved or slanted apostrophes, double quotation marks or long dashes.
3. On the Reader menu, go to **File > Save As > PDF**
4. Select the location on your own computer or network and click **Save**

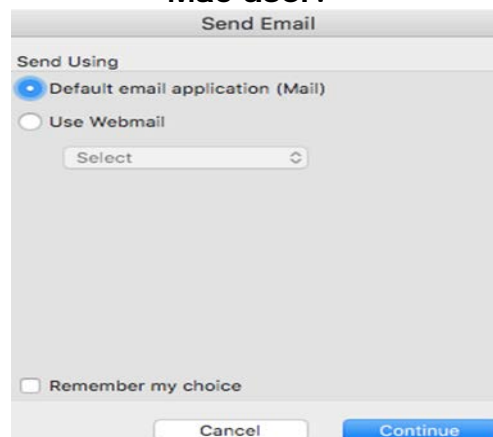
Tips for Submitting Completed Forms

The following dialog boxes should appear after clicking the 'Submit' button:

Windows user:



Mac user:



If you do not see the dialog box it means you do not have a default email application on your computer and **the 'Submit' button will not work**. You must save the completed form to your computer and send it as an email attachment.

Tips for Printing Fillable PDFs

Print only when your cursor is not in a form field

Use your mouse to select an area of the form that is not inside a form field or hit the tab key after completing the entry of your last box before printing your form. If a form field is active (e.g. contains the blinking bar) the contents of that block will not print.

Print from Acrobat, not the browser

If the fillable form is displayed within your web browser's window be sure to use the printer button on the Acrobat toolbar menu to print the form instead of your web browser's print function.

Troubleshooting

PHS Supplement does not expand when a question is answered 'Yes'

If you answer yes to a question on the PHS Supplement and the form does not expand to display additional questions make sure you have the most recent version of Adobe Reader installed. If you are a Mac user, be sure the form is being completed in Adobe Reader and not in Mac Preview.

Submit button does not work

If you do not have a default email application on your computer, the 'Submit' button will not work. You must save the completed form to your computer and send it as an email attachment.

Form or Field Exceeds Printed Page

If you cannot see the complete text of what you typed, the text is too long. You must shorten your entry to the words you can see, as only visible text will be printed.

Some printers may require use of the "Shrink to Fit" printer dialog box to be checked in order to print the form on a single page.

PDF file does not open

If you clicked on the email link for a PDF form and the form did not open, Adobe Reader, or equivalent software, may not be installed on your computer. Install the software and try to open the PDF file again <http://get.adobe.com/reader/otherversions>.

Unable to view or download a PDF file using Adobe Reader

If you cannot view, print, or download a PDF form in Adobe Reader, modify your Reader PDF viewer preferences:

1. Close the browser
2. Open Adobe Reader
3. On the menu bar, go to **Edit > Preferences > Internet**
4. Under Options, make sure that Display PDF in Browser is **not** selected
The next time you click on a link to a PDF form or publication, it will open in a

separate browser window.

PDF does not print correctly or does not print at all

You can try to resolve the problem by printing the PDF as an image. If you are using Adobe Reader:

1. Click on the **print** icon
2. In the Print dialog box, click **Advanced**
3. Check the **Print As Image** checkbox
4. Click **OK** to close the Advanced Print Setup dialog box
5. Click **OK** or **Print** in the Print dialog box

If printing the PDF as an image does not resolve the problem, try the following:

- Make sure you are using the latest printer driver for your printer
- Try printing to a different printer
- Download the file again to your hard drive and print
- Refer to your printer manual for further assistance

If you see the error message "Please wait... if this message is not eventually replaced by the proper contents..."

Please wait...

If this message is not eventually replaced by the proper contents of the document, your PDF viewer may not be able to display this type of document.

You can upgrade to the latest version of Adobe Reader for Windows®, Mac, or Linux® by visiting http://www.adobe.com/go/reader_download.

For more assistance with Adobe Reader visit <http://www.adobe.com/go/acreader>.

Windows is either a registered trademark or a trademark of Microsoft Corporation in the United States and/or other countries. Mac is a trademark of Apple Inc., registered in the United States and other countries. Linux is the registered trademark of Linus Torvalds in the U.S. and other countries.

This means you are trying to open the PDF in something other than Adobe Reader or Adobe Acrobat.

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- You may need to install the [Adobe Reader](#) software and try again.