

Adobe

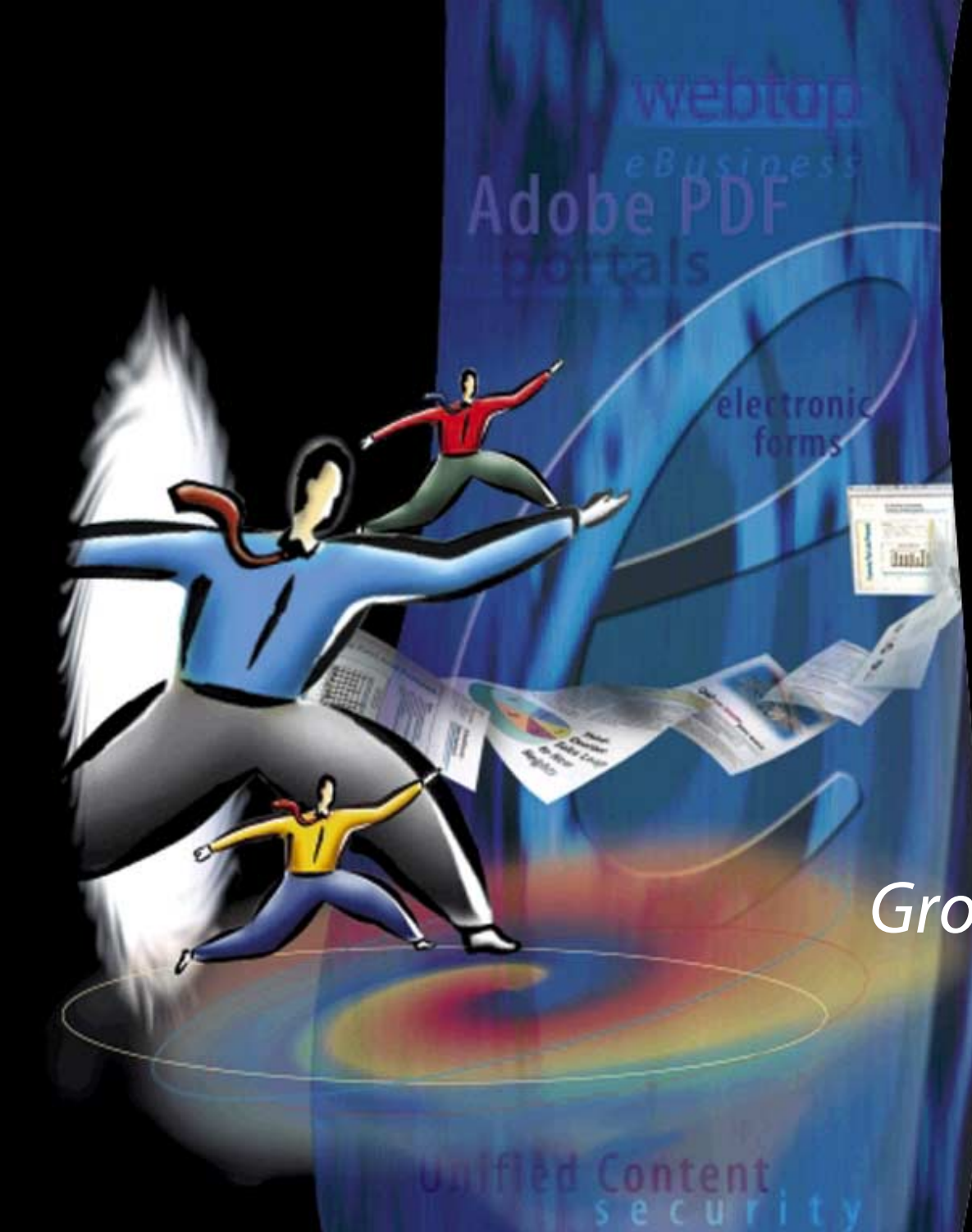
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The Evolution of Forms

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Why Electronic Forms?

- Web and e-mail infrastructure
- Customer and employee self service via the web
- Huge inefficiencies of paper for printing, storage, access, processing
- Efficient pipelining of data into database
- Reduce cycle time and forms rejection rate

Problems with Electronic Forms

- **Widespread adoption is low**
 - *Massive amounts of paper forms still exist*
 - *“Revolution” required to go to Web*
 - *Emphasis on electronic connectivity*
 - *Little regard for ergonomics*
 - *Electronic forms live in IT*
 - *Handwritten signatures still required*

The Solution for Electronic Forms

■ The benefits of paper

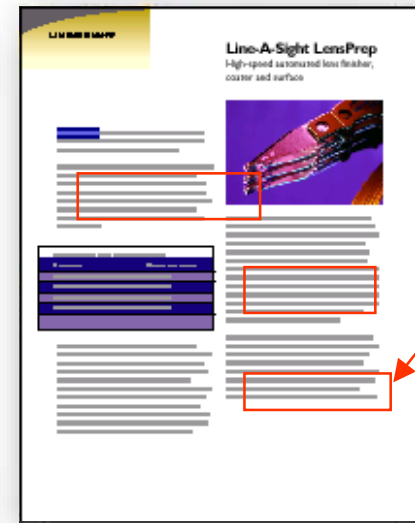
- *Ergonomic*
- *Familiar*
- *Can default to paper at any time*
- *Graphically complex*

■ The benefits of digital

- *Available anywhere (browser)*
- *Database connectivity*
- *Dynamic*
- *Constrained input*
- *Eliminate warehousing and printing costs*
- *Easy version control*

Electronic Forms with Adobe PDF

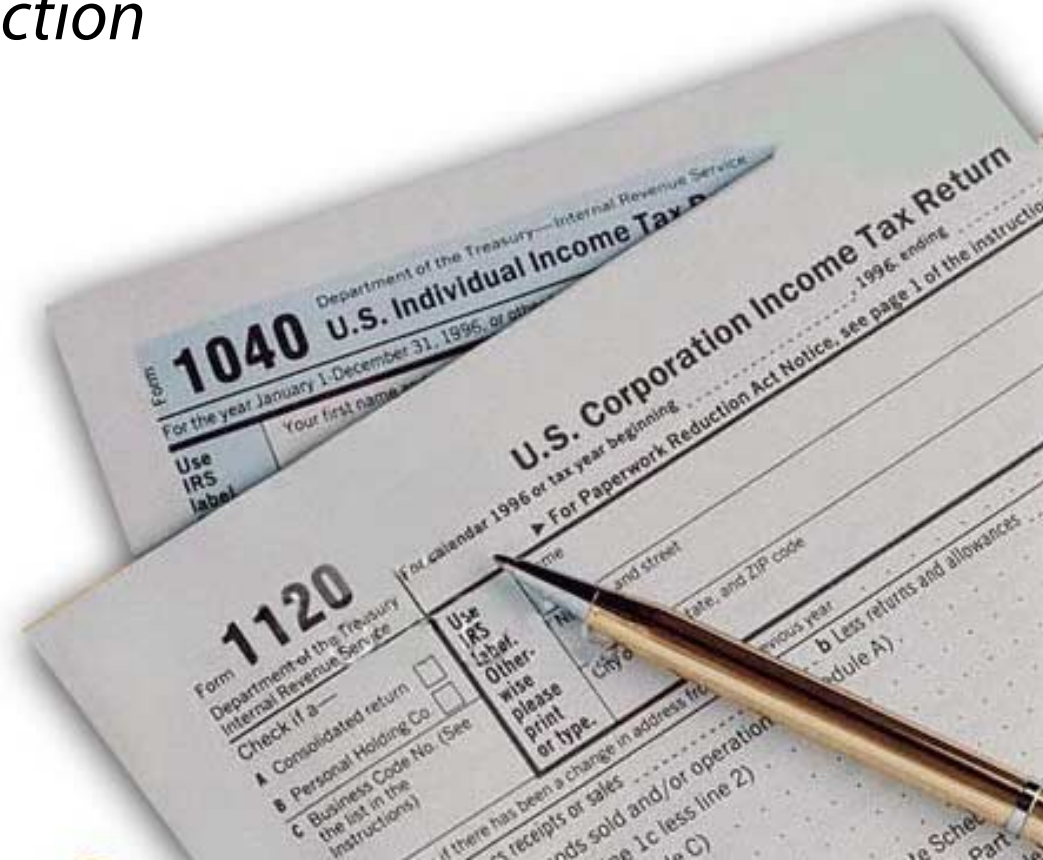
- **Create a PDF file**
 - *Create new form art and save as Adobe PDF*
 - *Scan and convert legacy forms*
- **Add electronic form fields to the Adobe PDF file**
 - *Database*
 - *Digital signatures*



Government e-Forms

■ IRS

- *Accessibility*
- *Exact fidelity*
- *Massive cost reduction*



Forms: Paper to Electronic

- Four distinct phases
 - *Phase 1: Distribute and Print*
 - *Phase 2: Electronic Fill and Print*
 - *Phase 3: Pre-Fill, Complete, Collect*
 - *Phase 4: Routing and Workflow*

The image shows a digital representation of a Form W-4 (1550), titled "Employee's Withholding Allowance Certificate". The form is displayed in a software window with a blue title bar. The form includes sections for "Personal Information", "Marital Status", "Withholding Allowances", and "Additional Information". The Adobe logo is visible in the bottom left corner of the overall image.

Phase 1: Distribute and Print

■ The “Digital Warehouse”

- *Shifts printing cost from author to consumer*
- *Problems with version control are greatly reduced.*



Phase 2: Distribute, Fill, Print

- Fill electronically
- Field validation
- Data standardization

The image shows a screenshot of a PDF form titled "W-4 Employee's Withholding Allowance Certificate" displayed in Adobe Acrobat. The form is from the Department of the Treasury, Internal Revenue Service. It includes fields for personal information such as name, address, and marital status, and sections for claiming allowances and exemptions. The form is numbered 1 through 10. The text "Cut here and give the certificate to your employer. Keep the top part for you" is visible at the top. The form is currently blank, with some fields like "Last name" containing the text "Geraci".

Lets you finally get rid of that typewriter on your desk.

Phase 3: Distribute, Pre-Fill, Complete, Collect

- Pre-filled by the server
- Data scrubbed and verified before being stored
- Direct data access to enterprise applications

The screenshot shows a web browser window displaying a form titled "ADOBE SYSTEMS INCORPORATED 401(K) & PROFIT SHARING PLAN BENEFICIARY DESIGNATION". The form is pre-filled with the following information:

Participant Information	
Name: Joel Geraci	Social Security Number: 123-45-6789
Address: 123 Main Street	NYC NY 10011
Street	City State Zip
Your Date of Birth: Oct 11, 1963	Marital Status: <input checked="" type="checkbox"/> Single <input type="checkbox"/> Married

The form also includes sections for "Beneficiary Designation" and "Instructions". The "Beneficiary Designation" section has two parts, each with fields for "Full Name", "Date of Birth", "Address", "State", "Zip", "Phone", "Relationship", and "SSN". The first part is marked as "Primary" and the second as "Secondary (check one)".

Phase 4: Fully Electronic

- Form as “application”
- Forms that “unfold” based on user input
- Guided fill

This screenshot shows the 'Change of Employee Status' form for employee Joel F. Gennell. The 'Step 2: Select Action' section is active, with radio buttons for 'Current Change', 'New Change', 'Transfer', 'Rate Change', 'Benefit', and 'Termination'. The 'CURRENT' section is expanded, showing fields for 'Enter Current Dept/Division Number', 'Enter New Dept/Division Number', 'Adviser Job Code', 'Walkford Job Code', and 'Office Location'.

Two overlapping screenshots of the 'Change of Employee Status' form. The top screenshot shows the 'NEW' section expanded, with fields for 'Enter New Dept/Division Number', 'Adviser Job Code', 'Walkford Job Code', and 'Office Location'. The bottom screenshot shows the 'Step 3: Select Action' section with radio buttons for 'Current Change', 'New Change', 'Transfer', 'Rate Change', 'Benefit', and 'Termination'.

This screenshot shows the 'Change of Employee Status' form for employee Joel F. Gennell. The 'Step 3: Select Action' section is active, with radio buttons for 'Current Change', 'New Change', 'Transfer', 'Rate Change', 'Benefit', and 'Termination'. The 'NEW' section is expanded, showing fields for 'Enter New Dept/Division Number', 'Adviser Job Code', 'Walkford Job Code', and 'Office Location'.

Benefits of Adobe PDF e-Forms

- Easily convert form from any application to Adobe PDF form
- Can look exactly like the original paper form for legal, regulatory and training requirements
- More extensive branding and format capabilities
- Long multi-page forms
- Multiple session or off-line fill-in

Adobe ePaper Products for e-Forms

- **Adobe Acrobat Reader**
With over 165M distributed WW,
businesses can distribute Adobe PDF
forms reliably
- **Adobe Acrobat Business Tools**
Enables form saving feature for multi-
session fill-in and digital signing
- **Adobe Acrobat 4**
Enables conversion of a form in any
format to Adobe PDF form
- **Acrobat Forms SDK**

Adobe ePaper Solutions Partners

■ Cardiff Software Inc.

- *TELEform with PDF+Forms™*
- *PDF+Forms for LiveLink*

■ Paper2Net.com

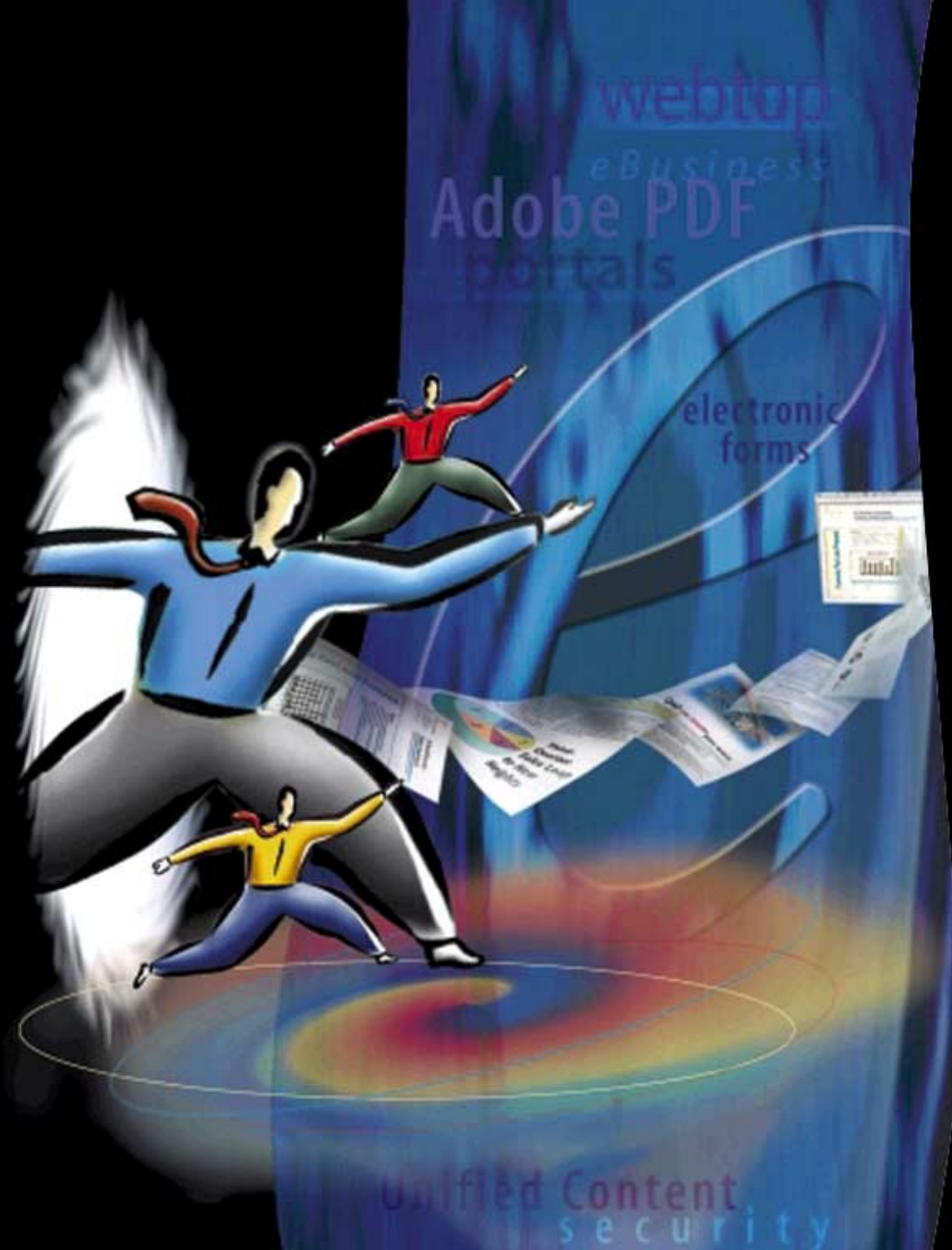
- *Office Courier*

■ Digital Signature Partners

- *CIC*
- *EnTrust*
- *VeriSign*
- *CyberSign*

Summary

- Increased efficiencies gained by going to e-forms
- Begin the transition by doing simple fill-in and print
- E-forms can be more accessible than paper versions
- Look to Adobe partners for integrated, enterprise solutions



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