

Electronic PDF Payroll Forms – Additional Guidance

Some users have raised concerns around the use of Payroll's PDF forms and have experienced problems with saving data to the PDF and also with editing the values on the PDF.

Using the PDF form

The PDF form is designed to be used with the University's default PDF software Adobe Acrobat Pro DC. All Staff and Students can download this software and ITS provide further detail on this software here: http://www.sussex.ac.uk/its/services/software/list?filter=home_use&id=471

Individuals who are using PDF readers may not be able to amend and save updated forms due to the limitations of their software. To avoid issues you should ensure you are using a PDF editor before completing your form.

Editing PDF Documents

When editing a claim form with PDF editor please make sure you follow the steps below to ensure your progress can be saved and is not lost:

- Access the casual claim form from our website
- Download the form to your PC
- Edit the appropriate fields and add your information
- Saving the document can be done in two ways:
 - o Clicking save and closing the document will retain the easy editing functionality but may not retain data in some software
 - o Clicking file -> print and choosing your systems option to 'Print to PDF' or 'Save to PDF' will create a new PDF document with all of your data printed to; note that this method will lose the easy editing functionality

Note that when using editable form fields on Mac and other applications the text may not appear when the document is forwarded on. To check this, you can click into the field, if the text appears then follow the instructions above to print to PDF and the values should be output on the resulting saved document.

Using a Web Browser as an Alternative

If you continue to experience problems with downloading and editing the form then web browsers such as Google Chrome can be used as an alternative PDF reading software. You can use your browser to enter data on the form by following the link and editing the fields on your screen.

You will not be able to save the document from here and clicking download will normally result in a blank version of the form being saved to your PC, even if you have already entered your information.

Google Chrome has its own 'Print to PDF' or 'Save to PDF' feature to create a new PDF document with all of your data printed to; note that this method will lose the easy editing functionality.

Editing and Amending a saved PDF

Forms which have been printed to PDF will often require editing or addition of information (such as Supervisor approval, cost codes or data amendments)

There are normally two options in most PDF editors to edit documents which have been printed to PDF:

- Clicking edit -> edit text and images, or using your software's text editing tool, will normally allow fields to be edited and amended
- If this is not possible then text can be added using the 'fill and sign' feature in Adobe or your software's equivalent feature

If text is entered incorrectly and needs amending, but you are unable to edit the values, try striking the text out by typing over it to leave it unreadable. You can then simply add text below to enter the correct values.

Alternative formats

It is preferred that forms are processed and submitted using the PDF version of the casual claim form. Users who experience continued issues with this format will in most cases be able to switch to the excel version of the form, which is found on our website here:

<http://www.sussex.ac.uk/humanresources/payrollandpensions/payrolldocumentsandforms>

The excel version of the form can be edited and saved using most spreadsheet packages (Microsoft Excel, Google Sheets, Mac Numbers etc.).

For Tier 4 Students experiencing issues the word version of the Tier 4 form can also be found on our webpage. This version can be edited and saved using most word processing packages (Microsoft Word, Google Docs, Mac Sheets etc.).