

## **Background**

The MOTDECC form is an adobe pdf e-form created for interactive use during the length of Clinical Placements undertaken by uOttawa Master's Degree students in Occupational Therapy. The form was originally designed to be filled out on paper during the placement. The form was transitioned to an electronically fillable format with fillable fields, dropdown selectors, and signature blocks at several locations in the form. However, several issues were encountered when using the forms in the field.

- 1) Some filled elements of the form disappeared when the document was opened by one user after the other had filled out elements and saved the document.
- 2) Fillable areas of the form that had not yet been completed, became "locked" after signatures were inserted in other areas of the document.
- 3) Since documents were electronically filled, there was more of a concern that portions of the document could be adjusted by one or other party after the other had already signed off on that part of the document (as compared to when it had been handwritten on paper).

## **Path Forward**

Several automated options are being examined regarding how to make the process more robust and secure while not imposing an added burden. At present we have set up a set of best practices for filling out the existing document.

## **Recommended Software**

We strongly recommend that students and supervisors use Adobe Acrobat Reader DC to fill out the form. This is free software that is available for Microsoft Windows and Mac platforms at: <https://get.adobe.com/reader/>

## MOTDECC e-form Completion and Signature Process

The following process is recommended for filling out the MOTDECC e-form to reduce issues that occasionally happen with the fillable form.

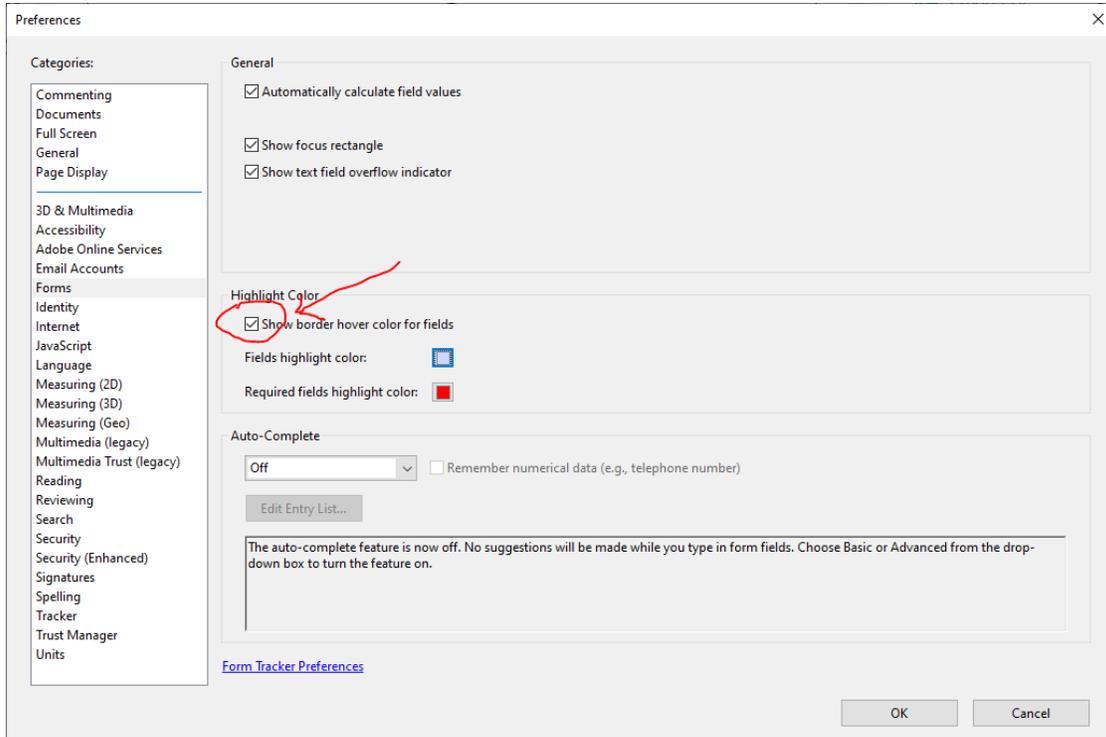
- 1- Supervisors and students should **complete all sections of the MOTDECC e-form, except signatures.**
  - a. Ideally, all fields are completed within the same document on one computer.
  - b. If not possible, supervisors and students are asked to both use Adobe Acrobat Reader to fill in the form. To obtain the latest, free Adobe Acrobat Reader software:  
<https://get.adobe.com/reader/>
- 2- The MOTDECC e-form PDF should be Flattened (Depending on your operating system, [See how to Flatten PDF on Microsoft](#) or [See how to Flatten PDF on a Mac](#))
- 3- At this point, the **student** should add their signatures and initials to the flattened MOTDECC using Adobe Acrobat Reader X or DC (See [How to add signatures on flattened document](#)) or using Preview application on a Mac computer (See [How to add signatures on flattened document with Preview](#)).
  - a. Add **Signature** and date on p. 10 (Section A), p. 19 (Section E) and p. 21 (Section F).
  - b. Add **Initials** on p. 15 (Section C; next to each attained objective) and p. 16-17 (Section D; at the end of each meeting summary)
- 4- The **student** should send the signed PDF to the supervisor **for review and signature.**
- 5- The **supervisor** should add their signatures and initials to the MOTDECC using Adobe Acrobat Reader X or DC (PC or MAC) or Preview application (MAC).
  - a. Add **Signature** and date on p. 10 (Section A) and p. 19 (Section E)
  - b. Add **Initials** on p. 15 (Section C; next to each attained objective) and p. 16-17 (Section D; at the end of each meeting summary)
- 6- The **supervisor** should send the signed PDF back to the student **for submission.**
- 7- The student should **upload the signed PDF onto Brightspace** (Virtual Campus) in the designated submission page.

## Tips and Tricks

### Where are the parts of the document that can be filled in?

If you can't see the parts of the document that need to be filled in, make sure that the following highlighting form option is turned on in Acrobat Reader DC

Go to Edit ->and Preferences (or press ctrl and K buttons simultaneously) to bring up the preferences dialog then select Forms under Categories. Make sure that the *show border hover color for fields* option is checked as shown below



Your document should now highlight form fields that need to be filled in as-in the example below:

**ELECTRONIC FORM**  
The student and the supervisor can complete this electronic version online and then print and sign it.  
The student can then return the printed form to the clinical fieldwork coordinator of OT at the University.

**Monitoring Tool  
for the Development  
of Clinical Competencies  
(M.O.T.DECC)**  
(Master's Degree in Occupational Therapy)

Clinical placement #:

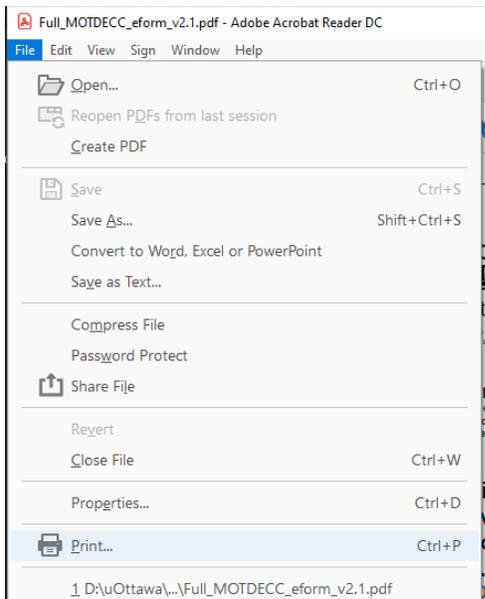
Date of placement: from  to

Student's name:	<input type="text"/>
Location of fieldwork experience:	<input type="text"/>
Supervisor's name:	<input type="text"/>

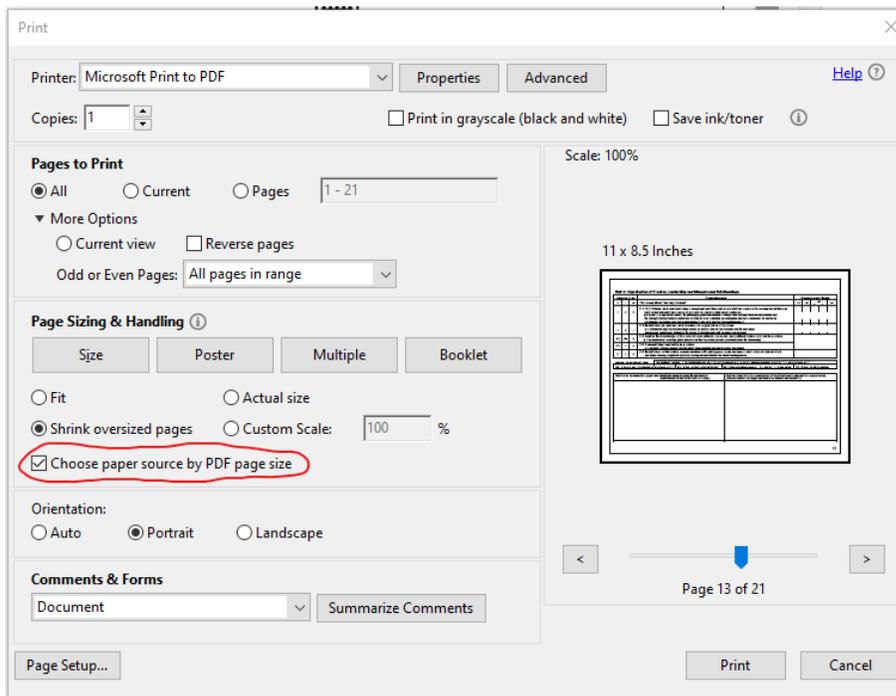
At the end of the placement, students must make a copy of this document and file it in their portfolio.  
The STUDENT is responsible for returning the original MOTDECC to the University  
of Ottawa fieldwork coordinator, with the other required documents.

## How do I Flatten the e-form on a Microsoft computer?

Within Adobe Acrobat Reader DC, select **File -> Print** (or press ctrl and P buttons simultaneously)



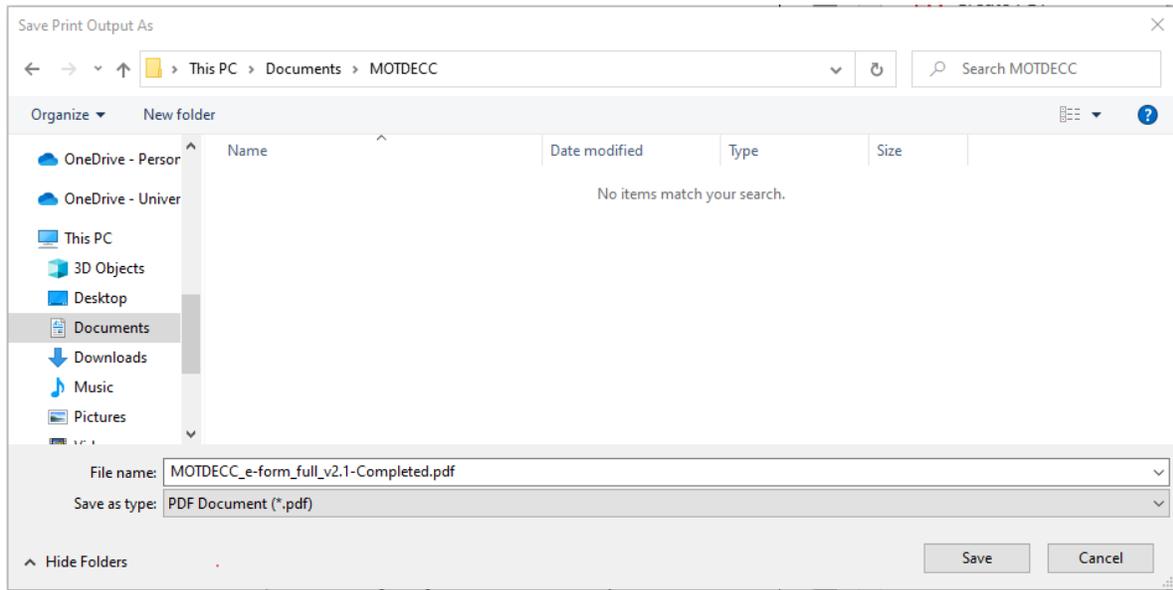
You will then select as printer “Microsoft Print to PDF” in the *Print* dialog



Make sure that **Choose paper source by PDF page size** is selected, so that landscape pages are not reduced in size.

Click the Print button at the bottom right of the dialog box.

When the **Save Print Output As** dialog appears add Completed to the document name



The e-form is now flattened, and you can proceed with signing the document (see [step 3 for students](#); [step 5 for supervisors](#)).

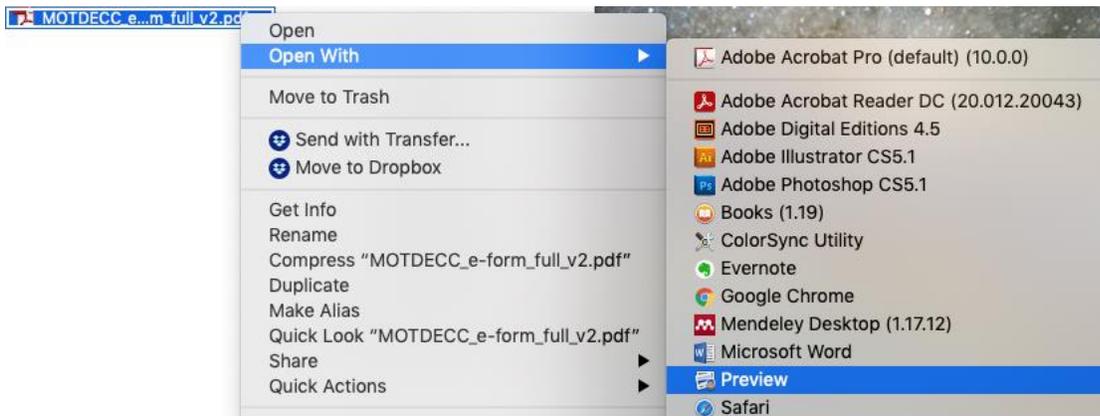
**Parts of the document that I or my supervisor already filled in are no longer visible – What can I do to try to get them back?**

We have found that in some cases, these elements are still in the document, but have become “invisible”. However, if the document is **“printed to pdf”** the elements may become visible (but not editable).

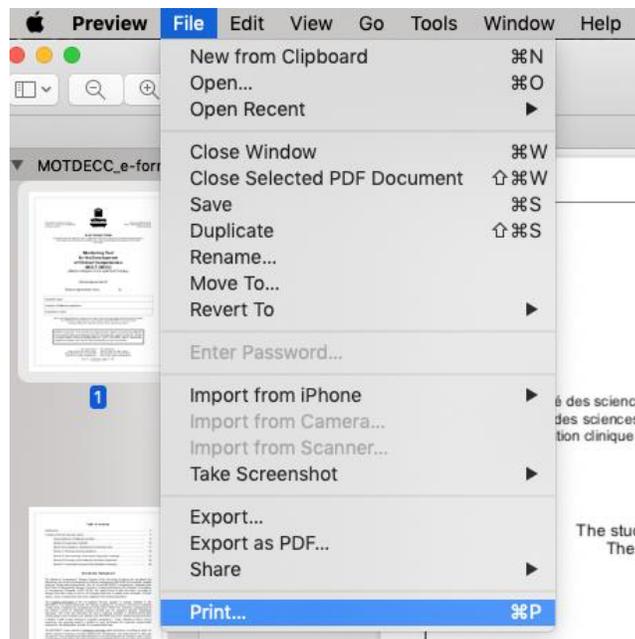
If after **“printing to pdf”** the elements are still not visible, go back to a previous version of the document and the last person who edited the fillable form must flatten the pdf before sending it to the other individual.

## How do I Flatten the e-form on a Mac computer using Preview?

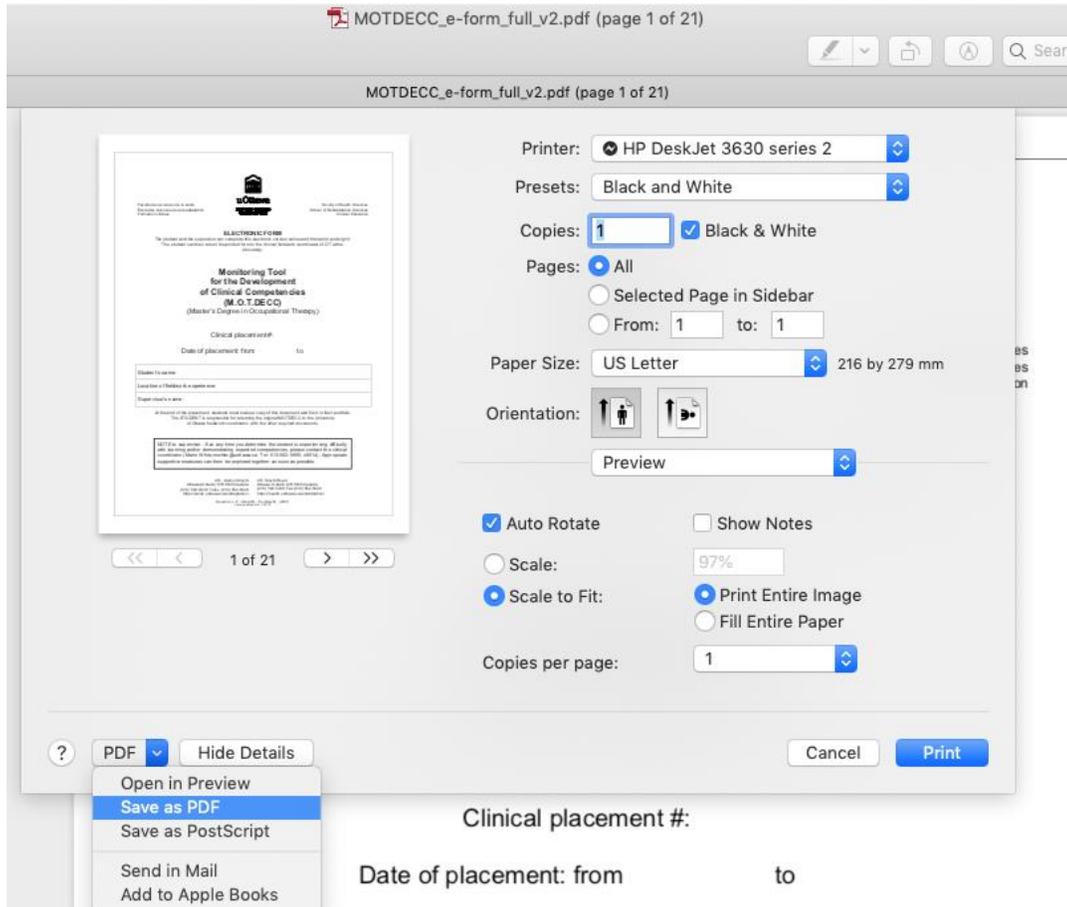
Open your e-form in Preview by right-clicking on the document and selecting: **Open with -> Preview**



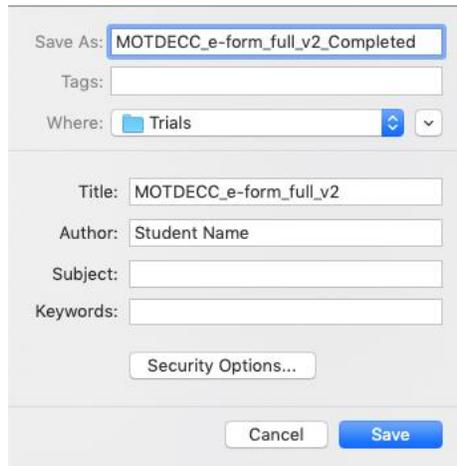
Within Preview, Go to **File -> Print...**



In the *Print* dialog box, click on the “PDF” dropdown menu on the bottom-left of the dialog box and click on **Save as PDF**.



When the save dialog opens, add “completed” at the end of your document and click “Save”:

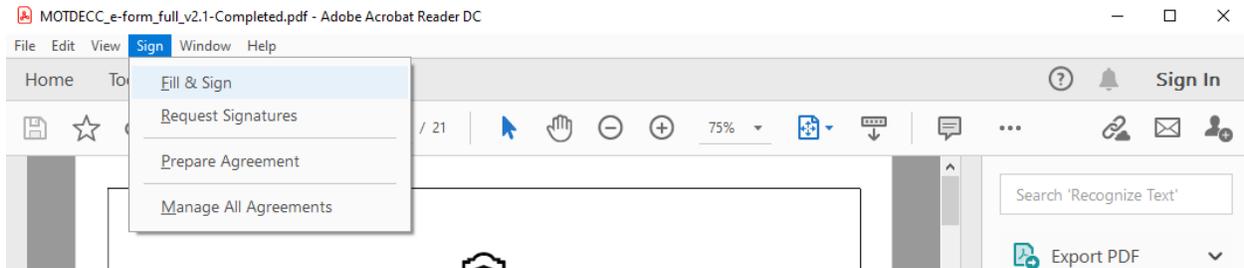


Your e-form is now flattened and you can proceed with signing (see [step 3 for students](#); [step 5 for supervisors](#)).

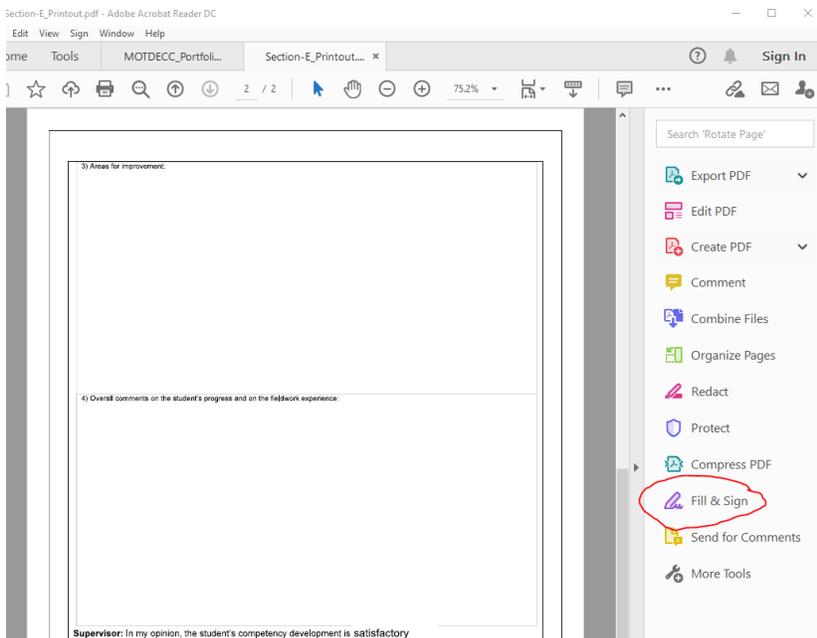
## How do I sign / initial sections of the documents with Acrobat Reader on PC or Mac?

When all parts of a Section of the MOTDECC have been filled by both student and supervisor to their satisfaction the section can be signed.

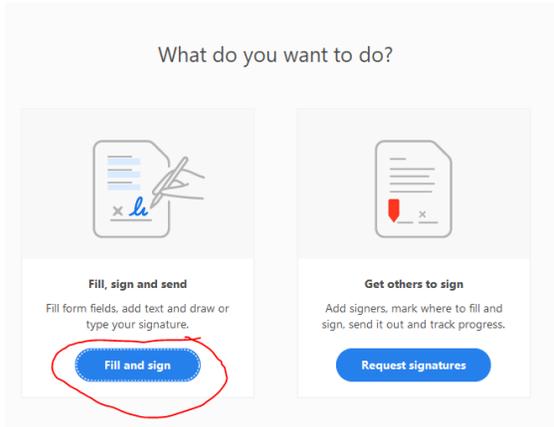
To sign the section, we recommend that the document is first printed to pdf (as described above), then the first signer should open the printed document with Acrobat Reader and select **Sign -> Fill and Sign** from the menu bar



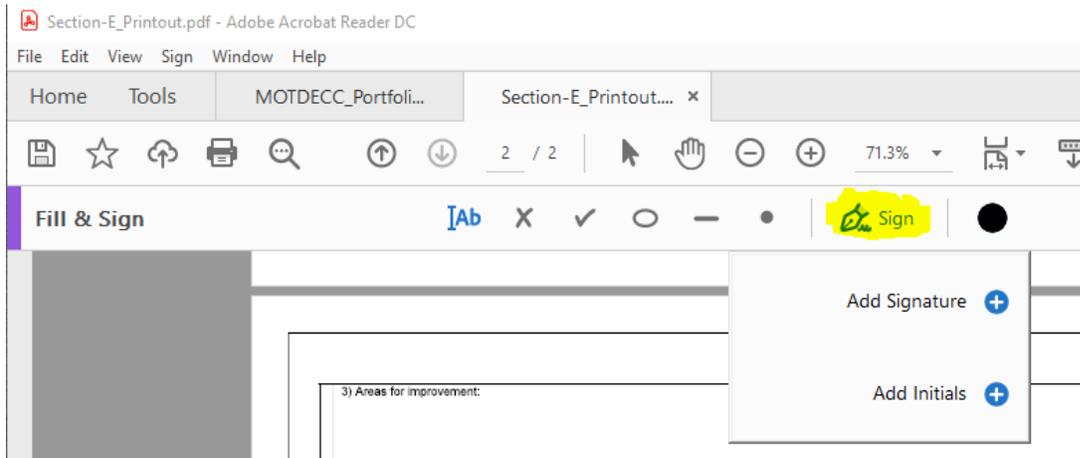
or **Fill and Sign** from the right tool pane.



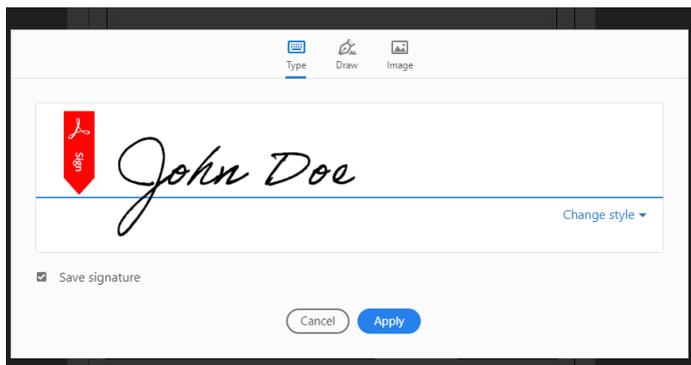
If you are presented with the choice *What do you want to do?*, you should select **Fill and Sign**.



You should now see the *Fill and Sign* toolbar above the document, and if you click on the sign icon you will have the option to set your signature or initials by clicking on the plus buttons.



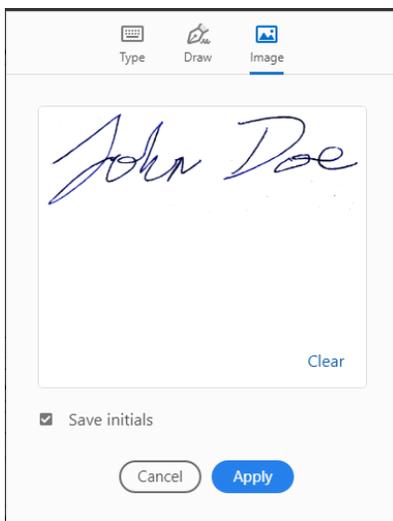
The signature / initials can either be typed into the dialog



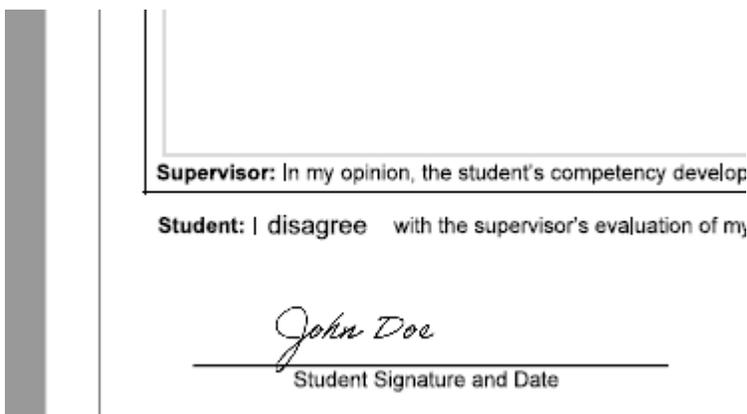
Or drawn in



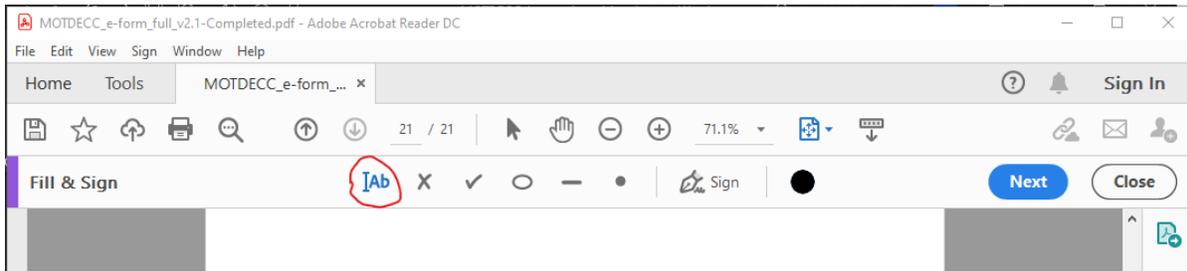
Or a scanned copy can be uploaded



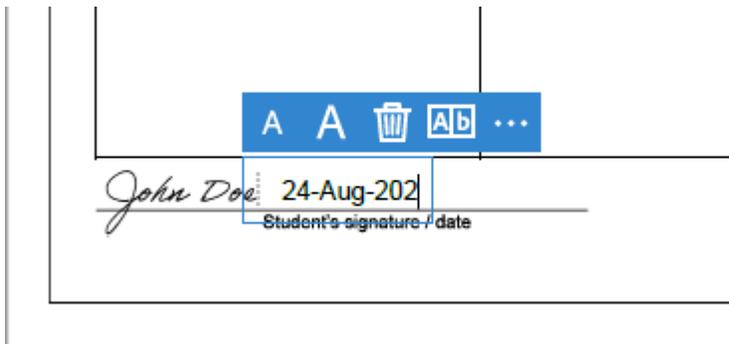
The signature can then be stamped at the locations required.



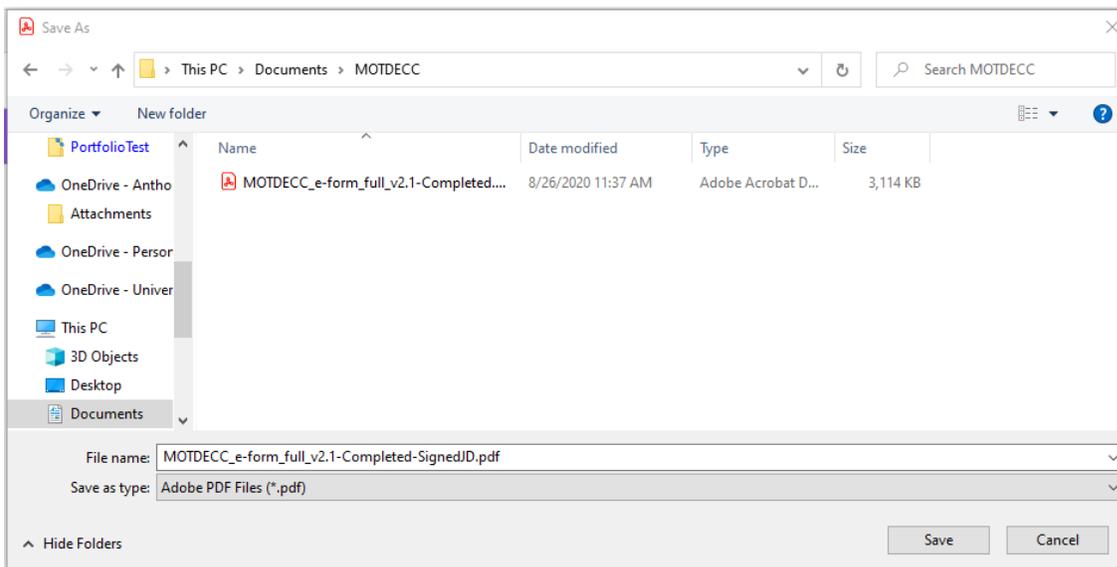
To fill the dates, select the Text Box from the Fill and Sign Bar:



Place the text box adjacent to the signature and then enter the date:



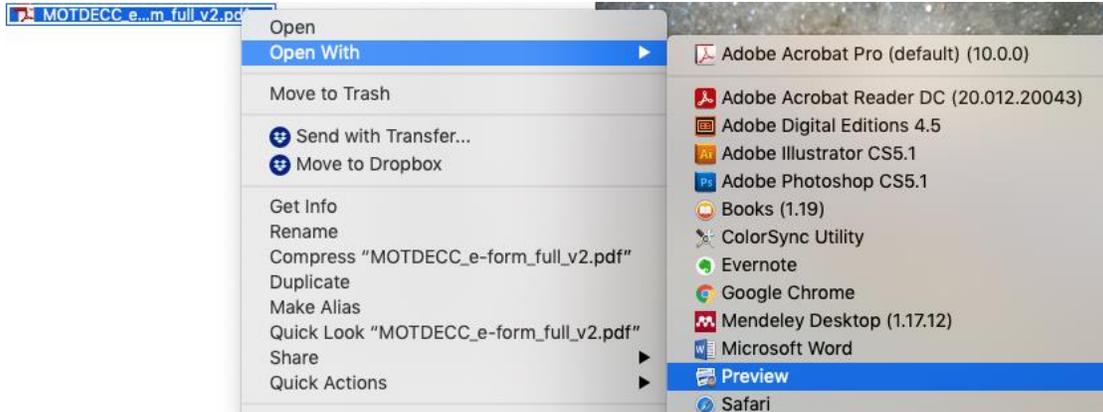
Once you have completed signing the document, save it using **File -> Save** and add - Signed and your initials to the file name in the **Save As** dialog



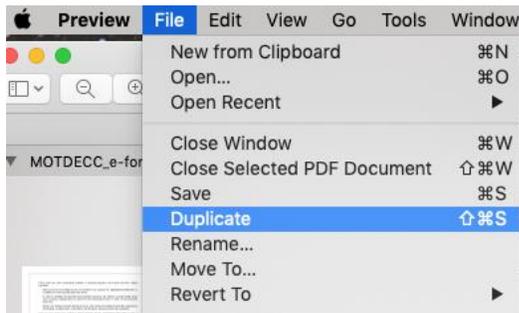
You can now send the file to the next person to sign and date.

## How do I sign / initial sections of the documents with Preview on Mac computers?

Open your PDF in Preview by right-clicking on the document and selecting: **Open with -> Preview**



Go to **File -> Duplicate** to create a new version.

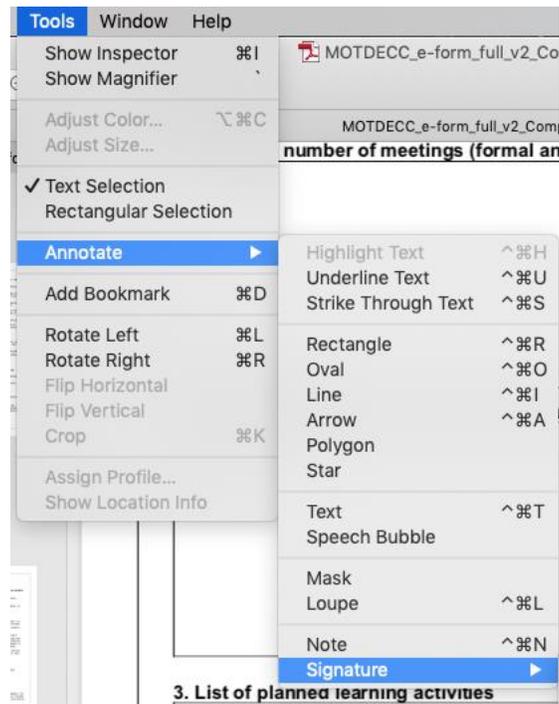


We create a new version in case there are compatibility issues when signing. This way we have the original saved as a different document.

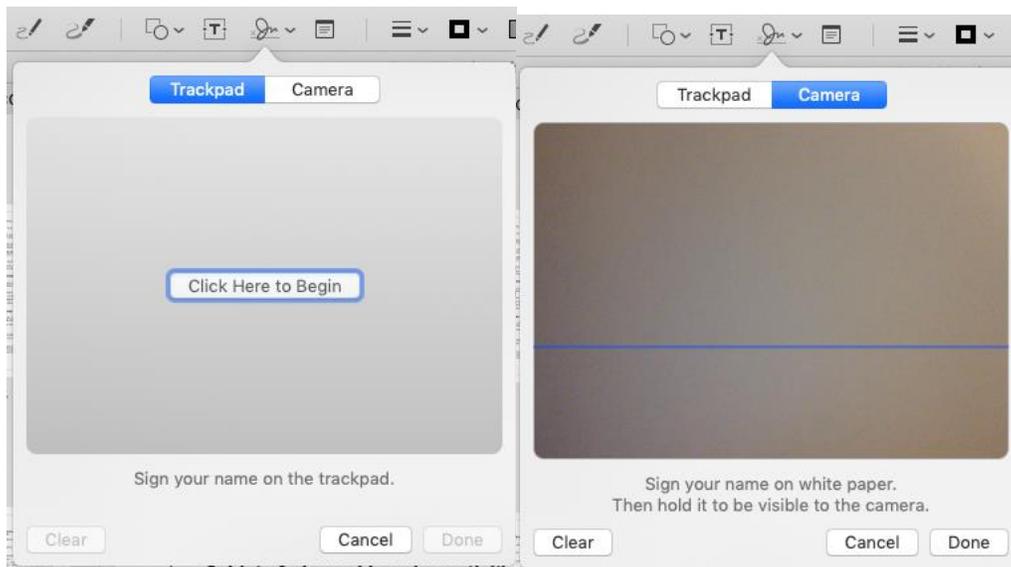
Rename the document by adding “\_signed” with your initials at the end of the title



Within Preview, go to **Tools -> Annotate -> Signature**

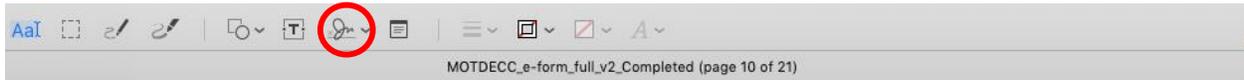


If you do not have a signature added to preview already, you will be asked to draw one with your trackpad or sign your name on a white paper and hold it to be visible to the camera.



When you are satisfied with your signature or initials, click **“Done”**.

Once your signature is created, it will appear when you click on the signature icon in the annotation bar. Click on the signature that you wish to add to the document.



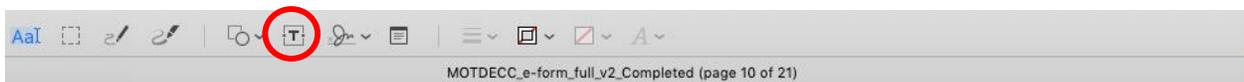
A box will appear containing the signature, which you can drag to the appropriate location.

**3. List of planned learning activities**

Activities Requested	Timeframes
	

Using a text box, you can add the date next to the signature.

- A text box might appear automatically
- Or to manually add a textbox, click on the  icon on the annotation bar.

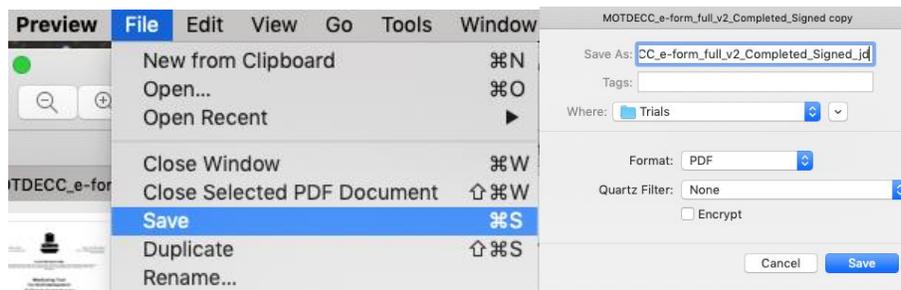


**4. Review of Section B competencies and Section C objectives: No**

 	
Signature and Date (student)	Signature and Date (supervisor)

Repeat this for each page that requires a signature.

Once you have completed signing the document, save it using **File -> Save**.



You can now send the file to the next person to sign and date.