Paper to digital form checklist

Form: _____ Started: _____ Live on: _____

Work down the page and tick each box as you go. Plan the boxes of your paper form in the conversion worksheet first.

1. Audit the paper form

- [ ] List every box on the paper form in the conversion worksheet, one row each.
- [ ] Mark each box Keep, Drop or Office use. Drop dates that the response records for you.
- [ ] Write one line on why you need each box you keep. No reason, no question.
- [ ] Give a box that asks two things (such as "breed and age") two rows.

2. Build the online form

- [ ] Get the questions in: retype them, import a CSV, or import the original PDF or Word (.docx) file.
- [ ] Pick a question type for every kept row. Switch on Required only for must-have answers.
- [ ] Add show rules so people skip questions that do not apply to them.
- [ ] Move each printed instruction next to the question it explains.

3. Test it

- [ ] Fill it in on a phone from start to finish, the way a new client would.
- [ ] Ask one real person to try it while you watch. Do not help.
- [ ] Check that every answer lands in the right column of your sheet or export.

4. Launch it

- [ ] Share the link, and print a QR code for the front desk, the door or the flyer.
- [ ] Pick where answers go: Google Sheets, a CSV export, or a PDF of each response.
- [ ] Turn on an email to yourself for each new response if you want one.

5. Keep paper as a backup

- [ ] Keep a few printed copies for anyone who asks for paper.
- [ ] Type paper answers into the online form the same day, so all answers sit in one table.
- [ ] Decide what happens to paper copies once you type them in, following your own record rules.

Free conversion worksheet (Excel or CSV) and the full guide: https://hornetforms.com/blog/convert-paper-forms-to-digital