



# CMS Form Builder Phase Two

(Requested updates as of 1-22-09. Confirmed and approved 1-30-09.)

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Below is a comprehensive list of requested updates for the CMS Form Builder Phase Two. The updates are listed in no particular order and are not approved. Some requested updates may be modified, declined or set aside for phase three.

## EDIT FORM

### Sort Functionality

- Update up/down sort functionality in “Edit Form” area to a “circular sort” so that you can move end (first/last) items to the top or bottom without having to manipulate it through the entire list.
- Allow form questions to be numbered in edit mode so that the user can easily identify items to a specific location.
- Add new sort feature to appear on each form question. “Move between \_\_\_ and \_\_\_”
  - (Example: “Move between item # 2 and item #3”)
- Add new group functionality that allows the form creator to group fields under particular category or heading – the code would utilize the legend tag to accomplish this feature. *(This may or may not be possible.)*

### Fields

- Increase the “Multi-Line” text field characters limit from 100 characters to at least 500, but preferably 1000. *(Currently, it is set at maximum 100 characters.)*
- Add new “State,” “County,” and “State Agency” dropdown menu options to the multi-line dropdown menu function. These options would allow a user to insert a dropdown menu with all US states or OK counties easily.
- Add new “Signature” field. This field would be a line with a title that is defined by the user:  

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Signature Field Title
- Add pre-set SSN field with validation. If this field is not masked by using the “Sensitive Data” feature, then data cannot be submitted; rather it can only be printed.

**FORM PROPERTIES**

- Add new “bar code” function to the ‘form properties’ area allowing the user to turn on or off (default = “OFF”) the option to place a bar code with a unique ID (assigned by the form builder system) on the actual form in the top right corner. The unique ID would be the same for all submissions for that particular form. (Agencies often require a unique id to identify their forms.) This feature is to also appear in edit mode in the “Edit Form” area in the top right corner.
- Add “Return Link Title” field. Currently the system displays the actual url of the return link. This will allow a title to appear linked to the url and avoid long url’s appearing on the page.
- Add new Submit/Print options:

Allow user to submit? (default = YES)

Yes  No

Allow user to print? (default = NO)

Yes  No

Allow user to save form as PDF? (default = NO)

Yes  No

- Allow multiple email addresses to be entered in the email notification field.
- Add new email notifications option as a part two for the notification email field:

Notify for each form submitted

Notify every  submissions

- This new function would appear under the notification email field as a second/required part. The first option is how it operates now and would be the default. The second option would allow the user to enter the number of how many submissions should be submitted before they are notified by email. That email notification would need to inform the user that \_\_\_\_\_ forms have been submitted for the <form title> form on their Web site.
  - Add the forms submission ID to the individual Email notification and to the Excel file for each form.

## VIEW RESULTS

- Update “View Results” (excel icon) function as follows:
  - When selected, instead of downloading an excel file, the user is taken to a new screen that shows:
    - A list of all form entries submitted for that form (submission ID, date, time submitted) with a preview (magnifying glass) function to the right of each one allowing the user to view the form with their data in place (instead of blank fields). This would also have a print function on it.
    - Add ability for user to search forms by submission ID.
- Add time/date stamp to all form results collected – to appear in excel download and on new ‘view results’ screen.

## PUBLISHED FORM

- Implement a verification code utility. (similar to Captcha)



## SENSITIVE DATA UPDATES

- Ability to collect sensitive data such as social security numbers and bank account information.
- Ability to encrypt any data such as name or address.
- Ability to print and not save a form with the purpose of the user populating a form with sensitive data, but not submitting it for retention in the database.
  - Encrypt All Data:
    - OK.gov proposes to encrypt all data collected in the form builder. This will prevent any sensitive data from not being encrypted, but will not jeopardize any non-sensitive information. Even though all data would be encrypted, this does not allow OK.gov to collect and store sensitive financial information (credit card and banking account numbers). It not allowed for this type of data to be stored on portal equipment.
  - Provide a resource/link to PCI best practices for how to manage data on a pc.
  - Admin Approval:
    - OK.gov proposes an approval process for all forms built utilizing the Form Builder. Once a form has been completed, the form would have to be approved by an administrative user within that CMS account. If the form designer is an administrative user, then the form will automatically be approved.
    - Add “Form Approvals” link in left navigation area under the “Form Builder” tab.
      - Admin Default = APPROVED

- Non-Admin Default = PENDING
- If pending, the “Collect Responses” page does not display URL. Instead, it displays a “Request Approval” link.
  - If user clicks it, then message changes to “Pending Approval.”
- The admin users should receive an Email alerting them of request for approval.
- If admin approves, then user is alerted by Email, status changes to approved, and “Collect Responses” displays URL.
- Add a “flag” status feature to approval status.



Red/Blue Flag = OK.GOV & ADMIN APPROVAL NEEDED



Red Flag = OK.GOV APPROVAL NEEDED



Green Flag = APPROVED



Blue Flag = ADMIN APPROVAL NEEDED



Black Flag = DENIED

- User is to receive an email notifying them of approval status.
  - Email is required to create a form.
- Add “Manage OK.gov Form Approvals” link to left menu of super admin menu.

- Keyword Black List & OK.gov Approval:
  - To assure users do not attempt to collect sensitive financial information & SSN’s, OK.gov proposes the creation of a black list of field name keywords. If a field name has a keyword in it that is on the black list, then the form will be submitted to OK.gov for approval before it is submitted to that CMS account’s admin user for approval. If the user is an admin user, then the form must still receive OK.gov approval before being published.
- Masked Data Option:
  - To allow users to collect sensitive information such as social security numbers, OK.gov proposes a “Sensitive Data” checkbox option on all fields that would allow that field’s data to be masked on a confirmation or print screen. When a user attempts to print the form *after* it has been submitted, then only the last four characters of data that was labeled as “Sensitive Data” will appear and asterisks will appear in placing of the leading characters.
- Build pre-set SSN field with validation. If this field is not masked by using the “Sensitive Data” feature, then data cannot be submitted; rather it can only be printed.