

2.15 Electronic Forms Creation & E-Signature Standard

Effective Date: February 25, 2026

Revised Date: February 25, 2026

1. Purpose

This standard establishes institutional requirements and approved platforms for the creation, deployment, and management of electronic forms at Arkansas State University (A-State).

The purpose of this standard is to:

- Ensure appropriate platform selection based on data classification and workflow complexity
 - Protect institutional data and maintain compliance with regulatory requirements
 - Provide governance over limited-license platforms
 - Prevent redundant or unsupported form technologies
 - Align electronic form development with enterprise architecture standards
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2. Scope

This standard applies to all academic and administrative departments at Arkansas State University, including all faculty and staff who create, deploy, or manage electronic forms for official university business. It governs the collection of data through public-facing and internal forms, including forms used for operational processes, workflow routing, approvals, authenticated submissions, and legally binding agreements.

This standard applies to any electronic form used to collect, store, or route institutional data on behalf of the university, regardless of audience or intended use.

3. Approved Electronic Form Platforms

Arkansas State University maintains a defined set of institutionally approved electronic form platforms to ensure data security, regulatory compliance, accessibility, workflow efficiency, and responsible license management.

The appropriate platform selection is determined by the complexity of the workflow, authentication requirements, data sensitivity, and the need for legally recognized electronic signatures. Departments must use the approved platforms outlined below and select the solution that best aligns with the specific business and compliance requirements of their form use case.

3.1 Formstack (Primary Institutional Platform)

Formstack is the primary approved platform for departmental electronic forms.

Formstack may be used for:

- Public or internal data collection
- Standard administrative workflows
- Approval routing
- Conditional logic and notifications
- Moderate complexity processes

Formstack is the default platform for:

- Departmental operational forms
- Surveys requiring structured data capture
- Standard approval workflows

Departments may create and manage Formstack forms within licensing allocations and ITS governance standards.

3.2 Slate (Enterprise Workflow & CRM Use Case)

Slate may be used for:

- Complex workflows
- CRM-integrated processes
- Admissions-related processes
- High-volume, logic-driven workflows
- Multi-stage process automation

Use of Slate outside of enrollment management workflows must be coordinated with the Data & Technology team within ITS and the Slate administrators. Contact EMDataTech@astate.edu for more information on using Slate to collect form submissions.

3.3 Pack Portal Forms (Authenticated Use Cases)

Pack Portal forms may be utilized when:

- Authentication is required
- The identity of the submitter must be verified
- Data must be tied to institutional identifiers (e.g., name, email, A-State ID)

- Secure routing is required within authenticated sessions

Pack Portal is appropriate for:

- Student-facing authenticated forms
- Employee-specific submission forms
- Institutional record-tied workflows

Contact packportal@astate.edu for more information on using Pack Portal to collect form submissions.

4. DocuSign – Restricted Use Cases

A-State maintains limited institutional licensing for DocuSign.

Due to contractual envelope limits and license constraints, DocuSign use is restricted to specific institutional use cases only and must be approved by ITS prior to being used with the A-State enterprise license.

4.1 Approved DocuSign Use Cases

DocuSign may be used only when:

- Federally recognized or legally binding electronic signatures are required, examples include:
 - Athletic coach contracts
 - HR tax documents
 - Official employment documents
- Or, extremely complex, multi-party signature workflows are necessary
- Or, regulatory compliance requires formal e-signature validation – in many cases, the Sign functionality within Formstack may be a viable alternative

4.2 DocuSign Administrative Creation & Governance

Departments are not permitted to independently create administrative DocuSign forms and should follow this process to seek approval.

1. Users must complete the designated TDX request form outlining the business case for DocuSign use.
2. ITS will review the request for:
 - Legal necessity
 - Platform appropriateness
 - Envelope impact
3. Upon approval, the form will be:
 1. Administratively created by ITS

2. Monitored for envelope usage
4. Approved departments will be granted DocuSign viewer licenses to keep track of envelopes and download completed forms as necessary.

DocuSign usage will be centrally tracked to ensure the university remains within contracted volume limits, and ITS reserves the right to determine that an alternative solution may need to be utilized if the annual volume is higher than projected.

5. Platform Selection Matrix

The following matrix provides guidance for selecting the appropriate electronic forms platform based on the type of use case, workflow complexity, authentication requirements, and signature needs. Departments should use this table as a reference to ensure alignment with institutional standards.

Use Case Type	Approved Platform
Standard departmental data collection	Formstack
Public-facing forms (non-authenticated)	Formstack
Authenticated student or employee form	Pack Portal
CRM-integrated workflow	Slate
Legally binding federal e-signature	DocuSign (Restricted)

6. Standards Review

This document will be reviewed and reaffirmed annually, or upon significant changes to university IT governance, systems, or regulatory requirements.

Effective Date: February 25, 2026

Next Review Date: February 25, 2027

Version: 1.0

Revision #3

Created 2026-03-12 00:57:38 UTC by Christopher Boothman

Updated 2026-07-28 19:11:41 UTC by Jacob Weaver