

Oregon E-Government Program Website Author Training Agenda

FormBuilder

90 Minutes

Audience:

Website authors with basic SharePoint authoring skills and the ability to effectively manipulate drag and drop functionality on a web page.

Goal:

Those in attendance will be able to appropriately create a simple form and set form preferences in such a way as to receive or determine the recipient of forms.

What's Covered:

- Why a form? What business need will this form fill or reduce effort for?
- What to collect – minimum to get the job done
 - More than what is required is too much
 - Personally Identifiable Information (PII) vs. Sensitive Personally Identifiable Information (Sensitive PII)
 - Sensitive PII is not to be collected via this tool
- Create a form
 - Utilize pre-configured fields
 - Utilize plain text entry fields
- Form Settings
 - Title and Headings
 - Security
 - Email settings
 - Recipients
 - Subject
 - 'From Field' – not recommended. The submission email will be aliased which causes security and/or spam filters in many email systems.
 - User Confirmations and success messages

If time allows:

- Conditional Fields
- Form page sections
- Form pages

<https://servicedesk.oregon.gov>



What is PII and Sensitive PII?

According to the Department of Homeland Security:

*DHS defines **PII** as any information that permits the identity of an individual to be directly or indirectly inferred, including any information that is linked or linkable to that individual, regardless of whether the individual is a U.S. citizen, lawful permanent resident, visitor to the U.S., or employee or contractor to the Department.*

Further:

***Sensitive PII** includes but is not limited to the information pictured here, which includes Social Security Numbers, driver's license numbers, Alien Registration numbers, financial or medical records, biometrics, or a criminal history. This data requires stricter handling guidelines because of the increased risk to an individual if the data are compromised.*

Example of PII that is not a privacy incident:

The loss of a list of names of people who were to attend a training would not in and of itself be a PII concern even though names of people were involved

Example of PII that IS a privacy concern:

The loss of a list of names of individuals to be disciplined for not attending a required training would be considered a privacy concern.

Even though the situation only involved names, the scenario is such that something that should remain confidential, a disciplinary action on an individual, was exposed.

Remember that ALL information that is entered into a Formbuilder form is sent via plaintext in email. Plain text emails ARE NOT a secure form of communication regardless of the owner or administrator of the email systems involved.

Any form of identification that cannot be found by a simple search must not be collected. These might include but are not limited to:

- Social Security numbers
- Driver's license number
- Bank or credit card information
- Passport number
- Any password
- Birthdate

This is not exhaustive as these along with other information can be used to obtain access to otherwise confidential information which could be used by a bad actor to obtain access to accounts and services and do damage to a person.

A form for a contact request may ask for a name and email address, but if as the recipient of the form you would not call the person, there is no reason to collect a phone number.

A form regarding professional licensure inquiries may request a name and professional license number, but probably would not need to collect a birthdate since that is likely already on record with the professional license number at the agency.

Err to caution and always ask for the bare minimum information to accomplish the task at hand.

