

# Wufoo Form Manager

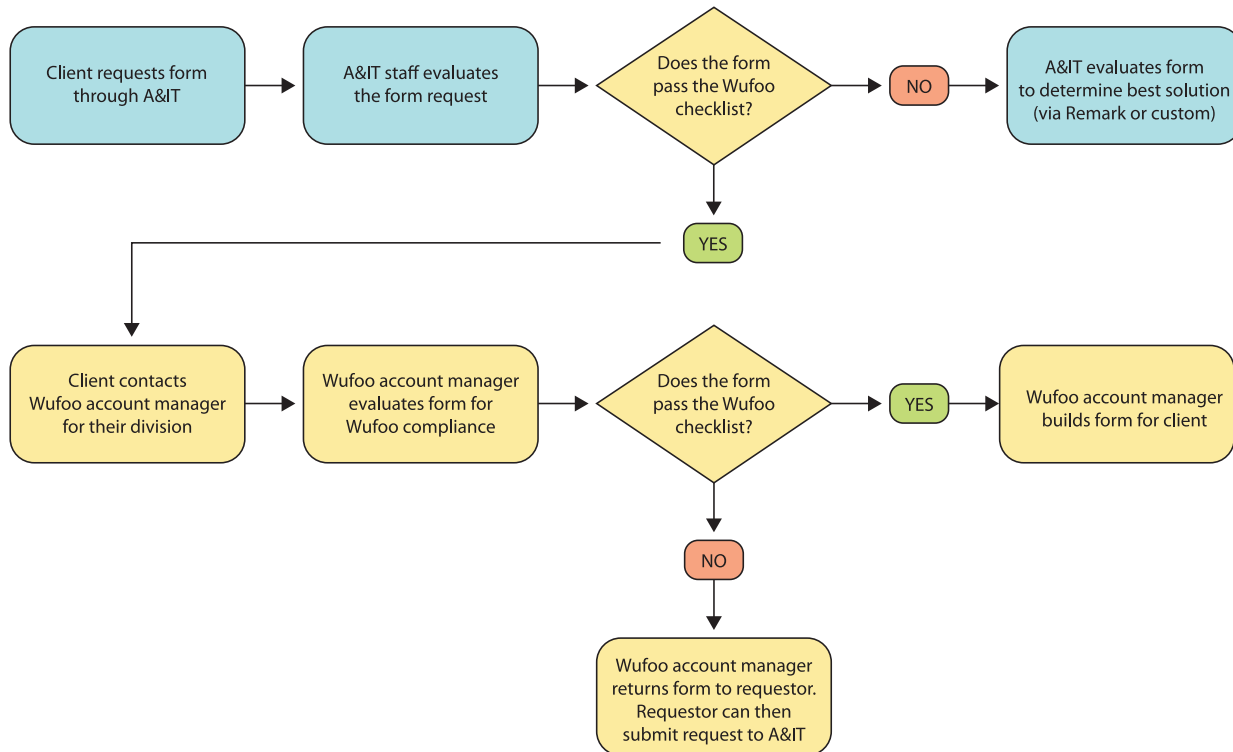
## Operations Guide

### Before you get started:

If your form is a survey, it should be reviewed by the IRB process to receive approval or exemption. Please contact the CSUCI IRB office via email: [irb@csuci.edu](mailto:irb@csuci.edu).

### Wufoo account manager role:

As the primary account manager for your division, you will help in the review process of form requests submitted by your colleagues. The flowchart below shows the process by which form requests should be evaluated. If any proposed form does not pass the “Wufoo Checklist” below, then T&C will work with you to create a custom form.



### Wufoo Checklist:

**Wufoo cannot be used for any of the following:**

#### Collecting sensitive info, such as:

- CC number for payment
- Place or date of birth
- Personal mailing address or phone\*
- Ethnic identification

#### Complex forms that require:

- Authenticated user login
- 100 or more fields
- 300 or more responses/month
- Branching or piping

#### Complex user interaction, including:

- Essay-type responses
- Confirmation page of entries
- Data field validation
- Save for later

\* Excludes forms specifically used to gather information from the general public. Wufoo forms should never be used to gather personal info from University students, faculty & staff. For more specific information on confidential/sensitive information, download the CSU Data Classification Standard at visit <http://policy.csuci.edu/IT/01/IT.01.001.pdf>

### Wufoo Features include:

#### Common form features, such as:

- Radio buttons, checkbox, Likert scale
- Multiple Pages for longer forms
- Required Questions

#### Automated features, such as:

- Auto send each new entry to admin
- Auto open & close registration
- Set maximum # of responses

#### Reporting features, such as:

- 24/7 access to reports
- Data download in Excel
- Auto receipt sent to users via email