OSU Policy on Digital Workflows and Digital Signatures related to Student Data

To meet federal obligations guided by FERPA, student privacy and information security must be observed on any form containing, or related to, student information at Oregon State University (OSU). To that end, as of July 1, 2021, all forms-based activities\(^1\) which gather student data and digital signatures are only allowable under the following circumstances.

- The template or form requires OSU authentication prior to the user accessing the form or
- The template or form is launched from a platform that requires OSU authentication (e.g., MyOregonState, Banner Self-Service, Salesforce) and limits the workflow to OSU email addresses only

FERPA-protected information includes any information personally identifiable to a student that is maintained by OSU once the student has matriculated at OSU\(^2\). This includes but is not limited to information related to student employment, student health services, students’ financial accounts, students’ academic records, etc.

Any form or template which collects, or grants access to, students’ FERPA-protected information must first be approved by the Office of the Registrar\(^3\) and required training\(^4\) must be completed by that form’s originating owners and/or senders. All OSU employees are expected to adhere to the tenets of this policy with regards to current and/or future digitalized forms and digital signatures.

Protocol for digital forms and digital signatures related to Student Data:

- Requestors will review and complete the required training.
- Requestors will submit the digital form to the Office of the Registrar for initial review, adjustments needed to the form, and approval via the associate registrar - compliance.
- OtR staff will submit a ticket requesting Administrative Technologies to schedule the work associated with digitalizing the approved form.
- Administrative Technologies will contact the requestor on the schedule and point of contact for the work to be completed.

\(^{1}\) Including, but not limited to: DocuSign, OnBase, Banner Self-Service, etc. Note, this includes internal homegrown tools.
\(^{2}\) Matriculated is defined as being registered for an OSU course or an OSU orientation program.
\(^{3}\) For review and approval, please contact OtR at: kristin.benson@oregonstate.edu
\(^{4}\) Required training can be found at: https://is.oregonstate.edu/docusign/resources/designers; https://is.oregonstate.edu/onbase/training;