



Dynamic Forms

Release 8.2

Release Summary

- Signature Widget
- API Administrator Portal
- Several Other changes / bug fixes

Electronic Signature Today

Electronic Signature - Current Functionality

Single Signature and Multiple Signature forms currently have only one flow.....

- A participant completes the form and is then presented with the electronic signature page. On this page, the user can:
 - Review the Consent and Disclosure Statement (per E-Sign Law)
 - Opt-In and electronically sign the form or -
 - Opt-out, view and print the PDF perform a wet signature and turn the form in
- Electronic Signatures are encrypted/hashed and stamped on form always at the bottom of the form

Current E-Sign Flow

Electronic Signature

Please read the Disclosure / Consent before sign your form electronically.

Disclosure statement

Typing your name exactly as it appears below signifies you are completing this form using an electronic signature. By signing electronically, you are certifying that you have read and understand the Disclosure/Consent and agree to electronically sign. You also agree to receive required disclosures or other communications related to this transaction electronically.

To continue with the electronic signature process, please enter your name and click the "Sign Electronically" button to save your information and submit your electronic signature.

Jim	Grace
Previous Sign Electronically	Opt-In/Sign
Signing electronically above is the fastest, most efficient wweeks. If you choose to opt out by clicking the "Opt out and print appropriate) and follow the instructions on the next page Opt out and print	vay to submit your information to Lee University. If you choose to opt out, processing time may be delayed by 2 to 3 "Ink below, you understand that you must print and submit the form and accompanying documentation (if to submit the form to Lee University. Opt-Out – Wet Sign

Current E-Sign Flow

Instructions

Now each participant goes through the exact same process and once the user opts in to the electronic signature process, the signature is:

- Represented as an unalterable text line at the end of the form
- Each additional participant's signature will be presented under the previous participant's

	First Name: * Jim	MI: Social Security Number: XXX-XX-* 3123 Student ID: * 4213423423
Email Address: *jim.grace	@ngwebsolutions.com	Phone Number with Area Code: *(354) 345-4325
2015 Support Paid		
You must verify support paid I	by you or your spouse in 2018.	
Select the choice that applies t	o your household.	
		One or more signatures
NO: Student and/or Spouse	(if married) did NOT pay support in 2016.	always presented at the
		- always presented at the
2016 Additional Support		bottom of the form in
2016 Additional Support	1	bottom of the form in
2016 Additional Support	t your household received additional benefits in th	bottom of the form in text
2016 Additional Support You must verify whether or no Select the choice that applies t	t your household received additional benefits in th o your household.	bottom of the form in text
2016 Additional Support You must verify whether or no Select the choice that applies t 'NO: No one in my househol	ot your household received additional benefits in th o your household. Id (as reported on the FAFSA) received additional	bottom of the form in text benefits in the 2017 and/or 2018 calendar year.
2016 Additional Support You must verify whether or no Select the choice that applies t 'NO: No one in my househol Please upload any supporting	ot your household received additional benefits in th o your household. Id (as reported on the FAFSA) received additional g documents here:	bottom of the form in text benefits in the 2017 and/or 2018 calendar year.
2016 Additional Support You must verify whether or no Select the choice that applies t NO: No one in my househol Please upload any supporting Certification	ot your household received additional benefits in the o your household. id (as reported on the FAFSA) received additional g documents here:	bottom of the form in text benefits in the 2017 and/or 2018 calendar year.
2016 Additional Support You must verify whether or no Select the choice that applies t NO: No one in my househol Please upload any supporting Certification	et your household received additional benefits in the o your household. Id (as reported on the FAFSA) received additional g documents here:	bottom of the form in text benefits in the 2017 and/or 2018 calendar year.

New Signature Widget Includes initials and date also

New E-Sign Widget

Before we get much further, we want to explain:

 Users will now have functionality to place a "signature widget" any place on the form rather than having the signature(s) at the bottom of the form.

	Jims Org				Go	My Forms 👻	Admin 🗸	.	?
Admi	ame / Type in Notification	Add Item Add Iter	n Template Edit Iten	n Styles					
F	Payments	I Table	${f A}$ Short Answer	¶ Long Answer	Date Picker	🔲 Choice List		heck Box	
CL	ustom Text	> Text & HTML	🗈 Image	🔹 File Upload	📰 Radio Buttons	🗷 Signature	C2 E	xisting Item	
	SSO								
	Events								
Pages	+	Table1	Employment Eligil Department of Hor	bility Verification meland Security	USCIS Form I-9 OMB No. 1615	.0047			

New Signature Widget

Features/Rules for the signature widget are:

- There is no charge for this enhancement
- There is no need to "opt-in" for this feature the only thing designers need to do is add a signature widget to a signature form.
- Form Designers cannot place a signature widget on a No Signature form
- If you choose, a date can be selected with that signature widget, and that date will be updated if forms are rejected, etc.
- Like all other page items, signature widgets must be assigned to a participant
- Form participants will be presented with the identical E-Sign compliant language when asked to electronically sign
- Opt-out: users will be shown a PDF of the form once they choose to opt-out similar to today. Like today, there is a warning and then a no-going back option.

New Signature Widget

Just a couple more (and these are important):

- There can be multiple signature widgets on a form either because multiple participants are being requested to sign the form – or – you are asking one participant to sign the form in two or more different places on the form.
- If there is no signature widget placed on a signature form, the now "old" signature process will be performed meaning participants will see the current electronic signature page. This also means that if you have a form with four signatures, and only three signature widgets are placed on the form, three participants will sign with the new widget and one participant will see the signature page. That also means that the single signature will show at the bottom of the form.
- On signature widget forms, the "Submit" button will appear as once they are completed with that page of the form, they have submitted the form. We have added an optional "Are you sure?" prompt which can be turned off.

E-Sign Widget – What the User sees

New yellow signature area....



Employment Eligibility Verification Department of Homeland Security U.S. Citizenship and Immigration Services USCIS Form I-9 OMB No. 1615-0047 Expires 08/31/2019

?START HERE: Read instructions carefully before completing this form. The instructions must be available, either in paper or electronically, during completion of this form. Employers are liable for errors in the completion of this form.

ANTI-DISCRIMINATION NOTICE: It is illegal to discriminate against work-authorized individuals. Employers CANNOT specify which document(s) an employee may present to establish employment authorization and identity. The refusal to hire or continue to employ an individual because the documentation presented has a future expiration date may also constitute illegal discrimination

Section 1. Employee Information and Attestation (Employees must complete and sign Section 1 of Form I-9 no later than the first day of employment, but not before accepting a job offer.)

Last Name (Family Name)	First Name (Given Name)		Middle Initial O	ther Last Names Used (if a	any)		
* 78	*						
		And North an	011	04-4-		7i= 0- 4-	
Address (Street Number and Name)		Apt. Number	City or Town	State	4	Zip Code	
Address (Street Number and Name)	U.S. Socia	al Security Number		City or Town	State	Zip Code	
R			-	i i i i i i i i i i i i i i i i i i i			
					*		
					Data		
					Date		
(click to sign)							
(onore to orgin)	*						
Signature	Date						
Next							

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E-Sign Widget – What the User sees

The same Opt-In / Opt-Out language is presented

U.S. Citizenship and Immigration S	ervices Expires 08/3	31/2019
	Sign electronically	×
TART HERE : Read instructions carefully before completing this form. The instructions m n. Employers are liable for errors in the completion of this form.	Please read the <u>Disclosure / Consent</u> before you sign your form electronically.	this
TI-DISCRIMINATION NOTICE: It is illegal to discriminate against work-authorized individ sent to establish employment authorization and identity. The refusal to hire or continue to iration date may also constitute illegal discrimination	Typing your name exactly as it appears below signifies you ar completing this form using an electronic signature. By signing electronically you are codifining that you have read and	re iture
ction 1. Employee Information and Attestation (Employees must complete and sign y of employment, but not before accepting a job offer.)	understand the Disclosure/Consent and agree to electronically sign. You also agree to receive required disclosures or other	у
st Name (Family Name) First Name (Given Name) Mid	communications related to this transaction electronically. To continue with the electronic signature process, please ente your name and click the "Sign Electronically" button to save	эr
dress (Street Number and Name) Apt. Number	your information and submit your electronic signature.	
te of Birth (mm/dd/yyyy) U.S. Social Security Number Employee's	Jim	
n aware that federal law provides for imprisonment and/or fines for false statemen m.	Grace	of thi:
test, under penalty of perjury, that I am (check one of the following boxes):	Sign Electronically	
(click to sign) mature Date	If you would like to opt out of electronic signature, please click the "Opt out and print" link below to save your information and print a local copy for your signature.	2 E
omit Form	Opt out and print	

Signature Widget – What the User sees

 User will see a representation of his/her signature on the form where the widget was placed



Employment Eligibility Verification Department of Homeland Security U.S. Citizenship and Immigration Services

?START HERE: Read instructions carefully before completing this form. The instructions must be availat form. Employers are liable for errors in the completion of this form.

ANTI-DISCRIMINATION NOTICE: It is illegal to discriminate against work-authorized individuals. Employ present to establish employment authorization and identity. The refusal to hire or continue to employ an il expiration date may also constitute illegal discrimination

Section 1. Employee Information and Attestation (Employees must complete and sign Section 1 of F day of employment, but not before accepting a job offer.)

Last Name (Family Name)	First Name (Given Name)		Middle	Initial
k 🛓	×			
Address (Street Number and Name)		Apt. Number		City or Tow
R		R		
Date of Birth (mm/dd/yyyy)	U.S. Social Security Number	Em	ployee's E-	mail Address

I am aware that federal law provides for imprisonment and/or fines for false statements or use of form.

I attest, under penalty of perjury, that I am (check one of the following boxes):

...3837323933

Jim Grace

11/16/2018, 2:02 PM Date

Submit Form

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Signature Widget – More Options

- Add either a Signature to the form or
- If more appropriate Add Initials to the form

Add Sig	gnature			×		
	Format	Signature	•			
		Signature				
Incl	lude date?	Initials				
Date	e Location	Right	•			
					3	
			Cancel	ltem		

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Signature Widget – More Options

- Add a signature date field to the form or not!
- If you do, you can add it to the right, left, above or below the signature or initials
- And once the date is added to the form, it can be moved to other parts of the

form as well	ſ				
	Add Signature		×		
	Format	Signature	•		
	Include date?	Yes			
	Date Location	Right Right	7		
		Left Above Below	l Item		
	X				

API Admin Portal

API Admin Portal – Summary

- New Functionality (again included as part of annual license fee)
- Enables users (with appropriate permissions) to build and manage APIs
 - We have made a security role change:
 - There is a new role called API Admin to use this feature
 - Currently no client user has this new role, you must request this role to your Site Admin and the new role will be given by Next Gen – after that the Site Admin can administer the role.
 - If you had the current "API Admin" role that role has been renamed and you will now have a role called API User
 - Users with the new API Admin role will have access to the new functionality from the Admin menu item as show here.



API Admin Portal - Access

- The API Admin user from Dynamic Forms will be logged into the API Portal users can only access the portal through Dynamic Forms
- The Admin will be presented with the name of the College/University of which they have access to and the API datasets which they have access to.
- In the example below, the API Admin of "Demo School" can see access to seven currently established datasets.



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API Admin Portal – Datasets

- Clicking that college profile enables the Admin to see the individual datasets
- In the example below, Demo School has seven dataset tiles with the names of each presented.

	Λ			A			
Next Gen API							
API Admin							
Home / Demo School							
Academic Catalogs	Academic Credentials	Advisors	Demo DataSet	SAP Standings	Student Demo	Students	
A valid academic catalog is a list that defines the programs and courses that are offered by an organization.	An academic credential attests to a qualification, competence, or authority issued to an individual by an educational institution to recognize the completion of a specified course of study.		Demo for testing		Pulls student data from a web API		

API Admin Portal – Dynamic Forms Orgs

- Like today, APIs are available to the organizations that they are created under.
- For example, if University College has a organizational structure like this:



API Admins would want to create APIs from the Human Resources Org for Human Resources only.

Likewise, if API Admins want to create APIs for Financial Aid only, the API Admin would start from the Financial Aid org and begin the API creation.

API Admin Portal – Shared APIs

 Many APIs are necessary across multiple organizations so we would suggest creating a structure which includes a "Common" or "Shared APIs" org that can be utilized by all groups. The Next Gen team can help set this up.



With a shared org structure, API Admins can create common APIs that are used by all or many of the departments and share them across the departments. This avoids the need to create them individually within each organization.

API Admin Portal – Dataset Types

- The overall goal is to have all SIS APIs available to users through the interface.
- Today, we offer:
 - Ability to build out of Custom API data sets
 - Access to a limited inventory of Banner/Ethos APIs
 - Again, we will be building these out over time, along with the Colleague, PeopleSoft APIs.

API Admin Portal – Add Datasets

 To add a new dataset, click the "Add DataSet" button and fill in the Name and Description, and click Save.

	Next Gen API				Log off		
	API Admin						
	Home / Demo School				+ Add DataSet 🛛 👻		
						ľ	
In t	his example we will	Next Gen API		Add Dataset		×	Log off
ado	a data set called			Name			+ Add DataSat
"St	udent Demo" with a	Home / Demo Schoo	I	Student Demo			TAUU Dataset
des	scription of "Pulls	Advisors	Demo DataSet	Description Pulls student data	a from a web API		
stu	dent data from a web		Demo for testing				
AP	I" and then click Save.					Cancel Save	
					Version 2018.1 (build 1238)		

API Admin Portal – Add Datasets (continued)

- Once created, click on the new "Student Demo" tile to enter setting for the web API connection. In this example we will use the following information:
- Type: Web
- Method: GET
- URL: http://10.90.3.22:88/api/students/[Id]
- The Input Values are automatically populated from placeholders in the URL (anything enclosed by [])

General Settings				
Name	Description		Туре	
Student Demo	Pulls student data from a web	API	Web	~
Web Settings				
Method Uf	۲L			
GET 🗸 h	ttp://10.90.3.22:88/api/students/[ld]			
Authentication				
None 🗸				
Headers	еу	Value	+	
Cookies				
No				
Input Values				
• Id				

API Admin Portal – Add Datasets (continued)

Define the format of the response.

- If the Format is JSON, the Path fields will use a syntax known as JSONPath for selecting values from a structured JSON response.
- If the Format is XML, the Path fields will use XPath for selecting values from the XML response.

Define each of the fields that will be pulled from the response from the web API, then click Save at the top or bottom.

-	Id	/	\$.Id	Format	Is Array?		
-	FirstName	1	\$.FirstName	Fields	Id	\$Id	Text Y Format
-	LastName		\$.LastName		FirstName	\$.FirstName	Text V Format
_	EmailAddress	/	Ś.EmailAddress		LastName	\$.LastName	Text V Format
-	Address	, ,	\$.Address		Address	\$.Address	Text Format

API Admin Portal – Add Datasets (continued)

- Click the Test button at the top to test the API call. Enter any input parameters and click Execute.
 - 5010001, 5010202 (any ids from the Custom Tools > API Demo Student Data will work)
 - After you execute a test, the input values will be stored in the "Load from previous tests" list so you can rerun the same test later if necessary.

Test				×
Method	Parame	ters	Load from previous test	~ Clear
GET	~ Id	5010202		
				Execute
"Student Demo": [{ "Id": "5010202", "EirstName": "Clark"				Î
"LastName": "Kent", "EmailAddress": "kentc@ "Address": "1432 5th St	⊚umn.edu", SE, Apt 406, №	linneapolis, MN 55414",		

API Admin Portal – Predefined Datasets

- As mentioned, as we build out our individual school information system datasets, these will be pre-defined within the Dynamic Forms application.
- If a client is a Banner or Ethos client for example, your Add Dataset button will now include a drop down option.



API Admin Portal – Predefined Datasets

- If you select to add a dataset from Banner, you will be shown a list of Banner APIs. You
 can select one or more APIs and click Save to create datasets for them.
 - After creating these datasets, you will need to edit the URL and Authentication settings for each dataset.

	Add Datasets From Banner	×		
	Filter Academic Catalogs A valid academic catalog is a list that defines the programs and courses that are offered by an organization.			
	Academic Credentials An academic credential attests to a qualification, competence, or authority issued to an individual by an educational institution to recognize the completion of a specified course of study.			
	Academic Disciplines An academic discipline is a branch of knowledge that is researched and taught as a part of higher education. This entity is used to define academic programs.			
	Cancel Sa	ave		

API Admin Portal – How to get started

- As mentioned, Next Gen will deliver this functionality with no client users having the ability to utilize this new API interface.
- To request access to the new API Admin Portal, you must have your College/University's Dynamic Forms Site Administrator approve your request.
- We have taken this conservative approach to ensure the security of the site for our clients.

New Forms

State and Federal Forms - Teaser

The new electronic signature widget opens Dynamic Forms to a number of new possibilities, including the ability to collect state and federal forms through the product. We have drafted two federal forms that we hope to release to clients soon – as you can expect there are several internal and external hoops to jump through.

- W-4
- **I**-9

We are finalizing both of these documents and will provide you with information on how to obtain them if you are interested.

W-4 Preview

Form W-4 (2018)

Future developments. For the latest information about any future developments related to Form W-4, such as legislation enacted after it was published, go to www.irs.gov/FormW4 Purpose. Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. Consider completing a new Form W-4 each year and when your personal or financial situation changes. Exemption from withholding. You may claim exemption from withholding for 2018 if both of the following apply. . For 2017 you had a right to a refund of all federal income tax withheld because you had no tax liability and · For 2018 you expect a refund of all federal income tax withheld because you expect to have no tax liability. If you're exempt, complete only lines 1, 2, 3. 4. and 7 and sign the form to validate it. Your exemption for 2018 expires February 15, 2019. See Pub. 505, Tax Withholding and Estimated Tax, to learn more about whether you qualify for exemption from withholding. General Instructions If you aren't exempt, follow the rest of these instructions to determine the number of withholding allowances you should claim for withholding for 2018 and any additional amount of tax to have withheld. For regular wages, withholding must be based on allowances you claimed and may not be a flat amount or percentage of wages. You can also use the calculator at www.irs.gov/W4App to determine your

tax withholding more accurately. Consider

Mast

using this calculator if you have a more complicated tax situation, such as if you have a working spouse, more than one job, or a large amount of nonwage income outside of your job. After your Form W-4 takes effect, you can also use this calculator to see how the amount of tax you're having withheld compares to your projected total tax for 2018. If you use the calculator, you don't need to complete any of the worksheets for Form W-4. Note that if you have too much tax withheld, you will receive a refund when you file your tax return. If you have too little tax withheld, you will owe tax when you file your tax return, and you might owe a penalty. Filers with multiple jobs or working spouses. If you have more than one job at a time or if you're married and your shouse is also working, read all of the instructions including the instructions for the Two-Earners/Multiple Jobs Worksheet before beginning. Nonwage income. If you have a large follow the instructions on line E of the amount of nonwage income, such as interest or dividends, consider making estimated tax payments using Form 1040-ES, Estimated Tax for Individuals. Otherwise, you might owe additional tax. Or, you can use the Deductions. Adjustments, and Other Income Worksheet on page 3 or the calculator at www.irs.gov/ W4App to make sure you have enough tax withheld from your paycheck. If you have pension or annuity income, see Pub. 505 or use the calculator at www.irs.gov/W4App to find out if you should adjust your withholding on Form W-4 or W-4P. Nonresident alien. If you're a nonresident alien, see Notice 1392, Supplemental Form W-4 Instructions for Nonresident Aliens, this purpose, total income includes all of before completing this form.

Specific Instructions Personal Allowances Worksheet Complete this worksheet on page 3 first to determine the number of withholding allowances to claim. Line C. Head of household please note: Generally, you can claim head of household filing status on your tax return only if you're unmarried and pay more than 50% of the costs of keeping up a home for yourself and a qualifying individual. See Pub. 501 for more information about filing status Line E. Child tax credit, When you file your tax return, you might be eligible to claim a credit for each of your qualifying children. To qualify, the child must be under age 17 as of December 31 and must be your dependent who lives with you for more than half the year. To learn more about this credit, see Pub. 972. Child Tax Credit. To reduce the tax withheld from your pay by taking this credit into account.

worksheet. On the worksheet you will be asked about your total income. For this purpose, total income includes all of your wages and other income, including income earned by a spouse, during the year. Line F. Credit for other dependents. When you file your tax return, you might be eligible to claim a credit for each of your dependents that don't qualify for the child tax credit, such as any dependent children age 17 and older. To learn more about this credit, see Pub. 505. To reduce the tax withheld from your pay by taking this credit into account, follow the instructions on line F of the worksheet. On the worksheet, you will be asked about your total income. For

	Separate here and give Form W-4 to	your employer. Keep the worksheet(s) for your records.
	Form W-4 Employee's With Organitment of the Treasury Internal Revenue Service	holding Allowance Certificate ain number of allowances or exemption from withholding is loyer may be required to send a copy of this form to the IRS.
ſ	Your first name and middle initial Last name	2 Your social security number
1	Home address (number and street or rural route)	3 Single Married Married, but withhold at higher Single rate. Note: If married filing separately, check "Married, but withhold at higher Single rate."
[City or town, state, and ZIP code	4 If your last name differs from that shown on your social security card, check here. You must call 800-772-1213 for a replacement card.
ţ	 Total number of allowances you're claiming (from the appl 	licable worksheet on the following pages)
6	Additional amount, if any, you want withheld from each particular to the second sec	aycheck
7	I claim exemption from withholding for 2018, and I certify	that I meet both of the following conditions for exemption.
	 Last year I had a right to a refund of all federal income to 	ax withheld because I had no tax liability, and
	 Inis year respect a resurid of all federal income tax with If you meet both conditions, write "Exempt" here. 	melu because i expect to nave no tax liability. 7

	Personal Allowances Worksheet (Keep for your records.)	
Α	Enter "1" for yourself	Α
в	Enter "1" if you will file as married filing jointly	в
c	Enter "1" if you will file as head of household	с —
D	Enter "1" if (+ You're single, or married filing separately, and have only one job; or	D
1	• You're married filing iointly, have only one job, and your spouse doesn't work; or	
	 Your wages from a second job or your spouse's wages (or the total of both) are \$1,500 or less. } 	
Е	Child tax credit. See Pub. 972, Child Tax Credit, for more information.	
	 If your total income will be less than \$69,801 (\$101,401 if married filing jointly), enter "4" for each eligible child. 	
	 If your total income will be from \$69,801 to \$175,550 (\$101,401 to \$339,000 if married filing jointly), enter "2" for each 	
	eligible child.	
	• If your total income will be from \$175,551 to \$200,000 (\$339,001 to \$400,000 if married filing jointly), enter "1" for	
	each eigible child.	F
F	Tradit for other dependents	
	If your total income will be less than \$69,801 (\$101,401 if married filing jointly), enter "1" for each eligible dependent	
	 If your total income will be from \$69,801 to \$175,550 (\$101,401 to \$339,000 if married filing jointly), enter "1" for every 	
	two dependents (for example, "-0-" for one dependent, "1" if you have two or three dependents, and "2" if you have	
	four dependents).	F
_	 If your total income will be higher than \$175,550 (\$339,000 if married filing jointly), enter "-0-" 	-
G	Other credits. If you have other credits, see Worksheet 1-6 of Pub. 505 and enter the amount from that worksheet here	G
н.	Add lines A through G and enter the total here	H
	 If you plan to itemize or claim adjustments to income and want to reduce your withholding, or if you 	
	have a large amount of nonwage income and want to increase your withholding, see the Deductions,	
	Adjustments, and Additional income worksheet below.	
	If you have more than one iob at a time or are married filing jointly and you and your spouse both	
	work, and the combined earnings from all jobs exceed \$52,000 (\$24,000 if married filing jointly), see the	
	Two-Earners/Multiple Jobs Worksheet on page 4 to avoid having too little tax withheld.	
	. If we like a state with the second s	
	We above	
	Deductions, Adjustments, and Additional Income Worksheet	
No	te: Use this worksheet only if you plan to itemize deductions, claim certain adjustments to income or have a large amount of non-	vage
inc	ome.	
1	Enter an estimate of your 2018 itemized deductions. These include gualifying home mortgage interest,	
	charitable contributions, state and local taxes (up to \$10,000), and medical expenses in excess of 7.5% of	
_	your income. See Pub. 505 for details	
2	Enter {\$24,000 if you're married filing jointly or qualifying widow(er)	
	\$18,000 if you're head of household	
2	s 12,000 il you re single or married illing separately}	
5	Subvaccime 2 non-mer r. n.2010 of less, enter -u- 3	
4	Enter an estimate of your 2018 adjustments to income and any additional standard deduction for age or	
5	Dimoness (see Fub, bus for information about there items). 4	
5	Auu mes 5 anu 4 anu enter met Mellolat	
0	Enter an esumate of your 2018 nonwage income (such as dividends or interest)	
7	Subtract line 6 from line 5. If zero, enter "-0-". If less than zero, enter the amount in parentheses	
8	Divide the amount on line 7 by \$4,150 and enter the result here. If a negative amount, enter in parentheses.	
	Drop any fraction	
9	Enter the number from the Personal Allowances worksneet, line H above	Ļ
10	Add lines 8 and 9 and enter the total here. If zero or less, enter "-0-". If you place to use the Two-Earners/	
	Multiple Jobs Worksneet, also enter this total on line 1, page 4. Otherwise, stop here and enter this total	0
	on Form VV-4, line 5, page 1	•

I-9 Preview

	Employment Eligibility Verification Department of Homeland Security U.S. Citizenship and Immigration Services							USCIS Form I-9 OMB No. 1615-00 Expires 08/31/20	047 19
START HERE: Read instructions ca rm. Employers are liable for errors INTI-DISCRIMINATION NOTICE: It is resent to establish employment au	arefully before comp s in the completion of illegal to discrimina thorization and iden	leting this for of this form. Ite against w tity. The refu	rm. The ir ork-autho usal to him	nstructions rrized indiv e or contin	i must be ava iduals. Emplo ue to employ	ilable, either ir oyers CANNO an individual	n paper or elec T specify whic because the d	tronically, during completion h document(s) an employee ocumentation presented has	of this may a future
xpiration date may also constitute Section 1. Employee Information a day of employment, but not before a	illegal discrimination and Attestation (Em accepting a job offer	n iployees mus r.)	st comple	te and sigr	Section 1 of	f Form I-9 no l	ater than the fi	rst	
Last Name (Family Name)	First Name (G	ven Name)		M	ddle Initial	Other Last N	ames Used //f an	w)	
Grace	Jim							<i>U</i>	
Address (Street Number and Name)	-		Apt. Nur	nber	City or Tow	n	State	Zip Code	
6821 Southpoint Drive North, Suite	220	1			Jacksonvi	ile	FL	32216	
Date of Birth (mm/dd/yyyy) 23452345345	U.S. Social S	Security Numbe	er	Employee	's E-mail Addre e@ngwebsol	ss lutions.com		Employee's Telephone Numb (904) 613-4759	er
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Employment Eligibility Verification Department of Homeland Security U.S. Citizenship and Immigration Services

USCIS Form I-9 OMB No. 1615-0047 Expires 08/31/2019

Section 2. Employer or Authorized Represen (Employers or their authorized representative physically examine one document from List A Documents.")	tative Review and Verification must complete and sign Section 2 within 3 OR a combination of one document from L	3 business days of the employee's first day of employment. You must List B and one document from List C as listed on the "Lists of Acceptable
Section 1	First Name (Given Name)	Middle Initial Citizenshipfimmigration Status
List A Identity and Employment Authorization	OR Li Ide	List B AND List C Employment Authorization
Document Title - Choose - issuing Authority - Choose - Document Number	Document Title Choose - Issuing Authority Choose - Document Number	Document Title Choose V Issuing Authority Choose V Document Number
Expiration Date (if any) (mm/dd/yyyy)	Additional Information	Expiration Date (if any) (mm/ddlyyyy) OR Code - Section 1
Issuing Authority Choose Document Number		Do Not Write In This Space
Document Title		
Choose V Document Number Expiration Date (if any) (mmlddiyyyy)		~

Certification: I attest, under penalty of perjury, that (1) I have examined the document(s) presented by the above-named employee, (2) the above-listed document(s) appear to be genuine and to relate to the employee named, and (3) to the best of my knowledge the employee is authorized to work in the United States.

The employee's first day of employment (mm/dd/yyyy):	•	(See instructions for exe	mptions)	
Signature of Preparer or Translator	Todav's Date (mm/dd/vvvv)		Title of Employer of	Authorized Representative
Last Name of Employer or Authorized Representatiive	First Name of Employer or Auth	orized Representative	Employer's Busines	s or Organization Name
Employer's Business or Organization Address (Street Number and N	ame)	City or Town	State	Zip Code
Form I-9 07/17/17 N			Page 2 of	4

Other Changes

Ability to define Label Position

- This new feature is available for all page items. Default is still on left.
- Designer now have the ability to position the text label mostly requested for check box – see the two examples below:



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New Button and New Prompt Options

- As designers use the new widget, end users will now be able to submit the form without going to the Dynamic Forms electronic signature page. Therefore we have replaced the button on the form page – it will now show "Submit" instead of "Next"
- Dynamic Forms still does field level requirement checks on the form before so users cannot submit a form without that check. However, we wanted to ensure that if the form designer wants to provide the user with a prompt before submitting the form, we have included that feature on the Name/Type tab on the Designer.
- We have set this to default to "Yes" on all forms including a signature widget and we have given the form designer two options:
 - Remove the prompt so no prompt (you can see an example on the next page)
 - Customize the prompt displayed to the user (otherwise the default prompt text will be used)

Prompt User Before Submitting Form?



Use Custom Prompt Text?

No

New Button and New Prompt Options

- After hitting the "Submit" button, form designers have the option to include this customizable confirmation prompt.
- Again, Dynamic Forms will still perform all required field checks before allowing the user to submit the form.

	Employment Eligibility Department of Homela U.S. Citizenship and Immig	Verification nd Security ration Services	USCIS Form I-9 OMB No. 1615-0047 Expires 08/31/2019
?START HERE: Read instructions ca form. Employers are liable for errors i ANTI-DISCRIMINATION NOTICE: It is present to establish employment auth expiration date may also constitute ille Section 1. Employee Information a day of employment but not before a	refully before completing this form. The instruct in the completion of this form. is illegal to discriminate against work-authorize iorization and identity. The refusal to hire or co egal discrimination and Attestation (Employees must complete an conduct a lich offer.)	tions must be available, either in paper or elect d individuals. Employers CANNOT specify whit ntinue to employ an individual because the doc nd sign Confirm form submission	tronically, during completion of this ch document(s) an employee may urmentation presented has a future
Last Name (Family Name) Address (Street Number and Name)	First Name (Given Name)	You are about to submit your Federal If you are ready, click the "Yes" button otherwise click "No, go back" button a updates.	I-9 form. In below, and make the appropriate
Date of Birth (mm/dd/yyyy) am aware that federal law provide form. attest, under penalty of perjury, th (click to sign)	U.S. Social Security Number Er s for imprisonment and/or fines for false st nat I am (check one of the following boxes):	ateme	No, go back Yes

Unique Form GUID now available on e-mail

- Every Dynamic Form has its own unique id and it is in the form of a GUID string something like this: 199308ad-ff0a-4b37-9033-05f492e4e760
- This enhancement allows the form designer to insert that unique GUID into an e-mail for for auditing purposes.

Image: Source Image: Sour	Dynamic Email values Display data/text from your form in the email. Be careful not to use sensitive information! Form Name	
	Form Owner's Name Hyperlink to Form Form URL URL-encoded Form URL	

New Designate Participant Option

- Now Form Designers can define the next person in the workflow based on values in the form itself.
- In the Participants profile, there is a new option as shown below.

How will this participant be designated?

- The 'Employee' user will specify the user
- I will specify the user
- The 'Employee' user will choose from a list I provide
- The 'Employee' user will choose from a list obtained from an API call
- I will specify multiple users / groups
- The participant will be designated from values collected on the form

New Designate Participant Option (continued)

- Once this option is chosen, Dynamic Forms will prompt the Forms Designer to select the required fields for the workflow as shown below.
- The data from those fields will then populate and the participant will be alerted to the need to take part in the workflow.

• The participant will be designated from values collected on the form

Participant Details	First Name	
		T
	Last Name	
		T
	Email address	
		¥

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New Designate Participant Option (continued)

- For example, the form below will be a single signature form if the user selects "independent" but will route to the parent if "dependent" is chosen.
- The Form Designer would then plug in the field values of the parent's first and last names and parent's e-mail in the participant profile.

Are you considered a Dependent or In	dependent student?	[*] Independent ▼			
As an independent student, are you m	aneu?	Married •			
Parent First Name *	Parent Last Name *	Please Select	Parent E-mail *		
Student Asset Amount		Single		Parent(s) / Spouse Asset Amount	
Cash, S	Savings and Checking Accounts	Married			
		\sim			
			• The participant will be de	esignated from values collected on the form	
			Participant Details	First Name	
				ParentFirstName	¥
	Participa	nt Profilo		Last Name	
	Faiticipa			ParentLastName	•
				Email address	

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What's coming next?

Product Roadmap – 2018-2019 Work

- Math calculations (Next!)
- API designer
- Plug and Play APIs
- True student portal
- Security by Org New*
- Texting New*