## Checklist for Testing Dynamic Forms

#### To know before you begin testing your forms

Your area is responsible for the development and maintenance of area specific Dynamic Forms. This means that your team will need to know which forms are currently in use, when a new form is needed, and when an old form needs to be updated or can be discontinued.

Forms begin as text or Word documents and are provided to the systems area to be built as a Dynamic form. The systems area may make recommendations for form design and function but will not make any changes without area approval.

#### What must be done before you begin testing:

* Check that all area staff have Dynamic Forms access
* Area staff have viewed the forms and listed requested changes/updates
* **FAVORITE YOUR FORMS**: If you are testing a new form, save time by adding it to your favorites
* From the dashboard view, under Form Templates, click on **Selected 1 orgs**
* Your selected Organization should be **KSU – Student Financial Aid – OneStop View**
* Statuses should all be checked
* Folder, Active, and Favorite Filters should be set to **Do not filter**
* Sorting by Form name
* Pages (set to your preference)
* CLICK **Save As Preference**
* Back in the form dashboard, **search in form template** with the form name and click on the small **star**  next to the bold text of the form name to add it to your favorites.
* Click on **Selected 1 orgs** again,
* Change Favorite Filters to **Show Favorite**
* CLICK **Save As Preference**

#### Make a list or outline of your area forms and form details

* **PUBLIC or PRIVATE**: Is this form public or private?
* Public can be found here: <https://www.kent.edu/fbe-center/forms-requests>
* Private are by request only or found in tracking requirements, ROAMESG, etc
* **ADMIN NOTIFICATION**: Which area staff will be responsible for the maintenance, testing, and processing
* Admin Notifications are sent to area staff once completed for last steps
* Include all area staff and the area mailbox
* Will area staff be included in form processing? If not, there is no need for Admin Notification
* **PARTICIPANTS**: Who will use this form?
* Is the form for student use only
* Will the student’s parent, parent spouse/partner, student spouse/partner, or a third party be an optional or required form participant
* For testing, staff will be asked to provide both a KSU email account and a non-KSU email account if needed to test as each form participant
* Will a student worker assist with form processing?
* **PAGES**: What is the goal of the form and what information needs to be collected or communicated?
* Each form consists of a header and participant text and fillable fields, dropdowns, attachments, or other features, and an Office Use Only section which at a minimum includes the form tracking requirement so that once the form is completed it can be indexed with AppXtender
* What is the tracking requirement for each of your area forms?
* Are any dates, terms, tax years, or aid years in the form?

#### Schedule Time for Testing forms with your area staff

* Meeting with the systems staff while you are testing is recommended, but not required.
* Updates can be made quickly by systems staff, so you don’t have to test multiple times or be prevented from next steps before the change(s) can be made.
* Consider the time frame that you’ll need to have the form live for use and plan to test your forms well in advance.
* One or two months prior to the date the forms will be live is standard.

Instructions to test the form – someone will have to act as the form initiator (and any additional participants)

* If the form includes a student worker for processing, **notify the packaging area staff** that you are testing a form. You may ask for their assistance in testing (systems staff can also assist).
* Use either the form link or test from the form's dashboard, for new forms using the dashboard is recommended.
* From the form dashboard, next to the bold text form name, click on the small square with an arrow pointing toward the upper right corner. 
* Once inside the form, the staff member participating as the form initiator should fill out the form with dummy text, completely and thoroughly. They should submit the form

## TESTING CHECKLIST

* Read through all form text and test
* Fillable fields
* Toggles
* Check boxes
* Date fields
* Aggregated fields
* Upload Attachment links
* Drop down selections

* Test all form links to be sure they are working and are directed to the correct website
* Is the form name/header spelled correctly and contains the correct aid year?
* Did the text fields for first name, last name, Kent State ID Number and Kent State Email Address prefill? Should they?
* Does the form use only approved KSU colors and naming conventions?
* Is the University Office of Scholarships and Financial Aid named correctly where it appears?
* Has any mention of the One Stop been updated to Financial, Billing and Enrollment Center?
* If instructions for checking Self Service Banner exist, are they updated for SSB9?
* Are all terms, aid years, and tax years, and due dates, correct?
* Are any dollar amounts or credit hour amounts up to date and current?
* If fields in the form are associated with rules for displaying, are they working correctly?
* Are any actionable requirements set to be required before form submission?
* Did the form have the correct associated tracking requirement?
* When the form initiator submits the form, does the form initiator receive an email? Should they?
* If a second participant (parent/parent spouse/student spouse/third party) is needed – test both once with a KSU email account and once without
* The second participant can be the same person, but having a second staff member assist in this is encouraged. Are all of their fields working correctly? And if any form text from the previous participant should be concealed, was it concealed?
* Was an email sent to the next consecutive participant (either external, student worker, or area staff for processing- test all that apply)?
* Was the UOSFA header in the email?
* Did the email have the form initiator name, form name, and student ID, in the subject and/or body of the email? Should it appear?
* Did the email contain SSB9 updated instructions?
* Did the email contain a link to the form?
* Was navigating the form user friendly?

#### SYSTEMS NEXT STEPS

Now that your form has been tested and approved, this is what will happen next:

* Systems will delete the tested versions of the form
* Systems will update the student worker participant from “development” to “actual” - this includes actual student workers and not just testing staff
* Systems will download a PDF version of the form and test it ADA compliance
* Systems will share the form link through email to area staff for use, to be updated on the web here: <https://www.kent.edu/fbe-center/forms-requests>  (public forms only), and in the SFA and Regionals Channel files in the Dynamic forms folder for FBE access
* Systems will submit a ticket to IT to request that auto indexing will be set up for the form with AppXtender

#### AREA NEXT STEPS

* Review any text used on your website for public form links and compile a list of any updates or corrections for systems staff – web text and updated links for the website are performed by Autumn Koncler
* Private forms added to ROAMESGs or tracking requirements will need to be reviewed for text updates – give instructions to systems staff to update with the new form link
* Determine the date the form should be live for use and provide that date to systems