

DocuSign PowerForms Best Practices

This document provides guidance and recommends best practices for implementing DocuSign PowerForms. It emphasizes two key areas: enhancing first-signer email security and restricting PowerForm access by requiring SSO-based authentication.

PowerForms Overview

A **DocuSign PowerForm** is a self-service form created from a DocuSign template that automatically generates a new envelope each time a user accesses and submits it.

PowerForms are ideal for collecting signatures from unknown recipients and can be shared through websites, portals, or secure links for student, employee, customer, and public-facing processes.

Recommended Best Practices

- Enable the **“Require Email Validation”** setting on the PowerForm to ensure the first signer receives a signing validation code by email and must provide the code to resume and complete the signing session.
- Set the second role to **“Receives a Copy”** so the first signer receives decline notifications and a security reminder when a PowerForm is submitted on their behalf.
- Place PowerForms links behind authenticated portals whenever possible to ensure that only UMB employees and students can access them.
- Monitor PowerForm submissions and activity. When authenticity is in question, review the **Envelope History** and **Certificate of Completion** to verify signer activity, including timestamps, IP addresses, and other audit details.

First Signer Email Security

Email validation requires the signer to enter their email address, receive a validation code by email, and enter that code to access the document and complete the signing session. While this confirms access to the email account, it does not verify the signer's legal identity. Risks remain, including compromised email accounts, shared mailboxes, and public exposure of PowerForm URLs.

SSO Authentication

Guard PowerForm links behind SSO authentication to ensure users sign in with their UMB credentials before accessing PowerForm. This approach should be used when the PowerForm is intended for UMB employees or students only.