



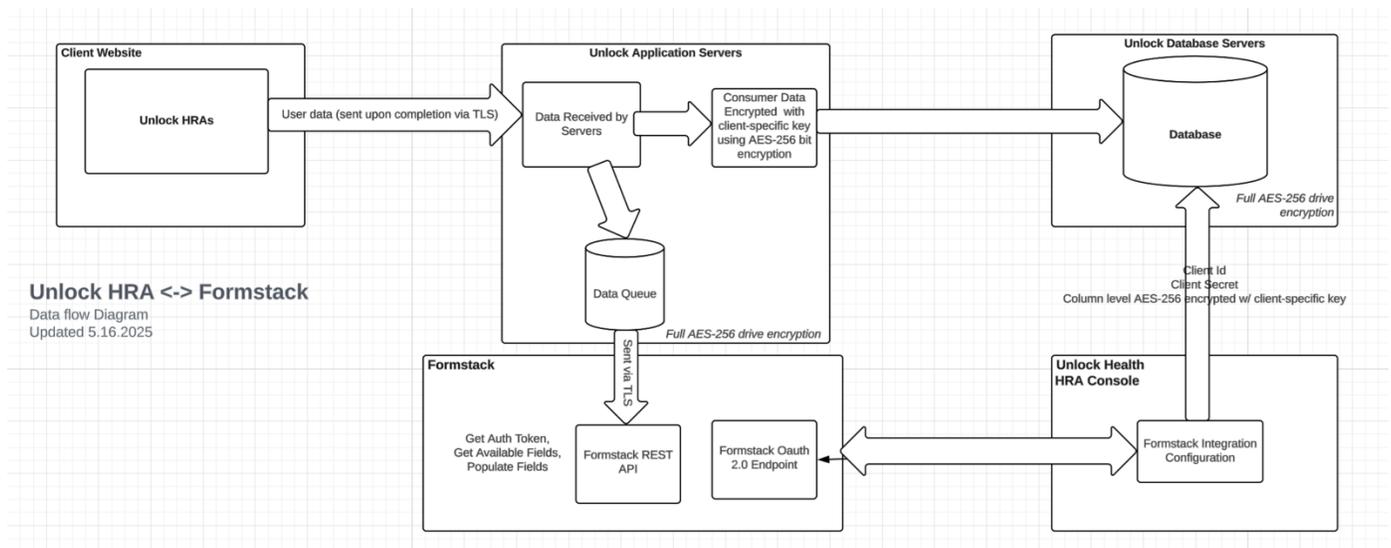
# Formstack Integration

## Overview

The Formstack Integration for Unlock Health HRAs allows for real-time data to be delivered to Marketo as users complete the HRA. Information is sent from Unlock Health servers directly to Formstack over an SSL link using the Formstack REST API. Each HRA completion is sent to the Formstack system and a record is either created or updated.

The API is authenticated using a Client Id and Client Secret key provided within the Unlock HRA Console. Once this authentication is completed, the integration can be added to each HRA as part of each HRA's Follow-up Plan. The user who configures the authentication must confirm that the client has secured a BAA with Formstack before proceeding.

## Data Flow Diagram



## Authentication Process

To set up the integration, we use OAuth 2.0 Client Id and Client Secret API credentials that you can retrieve from the Formstack system. The Client Id and Client Secret are encrypted when stored with Unlock with a client specific encryption key to protect this data at rest. Unlock decrypts and uses the Client Id and Client Secret when calls are made to Formstack as users complete HRAs.



## API Volume & Concurrency Requirements

All user completions from the HRA side are first delivered to a queueing within Unlock HRA platform infrastructure. This queueing system allows us to ensure that we are not overtaxing a client's API and allows us to handle API availability errors gracefully. Requests are processed one at a time sequentially so there are no high concurrency requirements.

Unlock has constructed the integration to be very efficient, so for each HRA completion, only 3 API calls will occur. Certain clients may utilize Call Engagement CTAs which if used, will add an additional 4<sup>th</sup> API call conditionally if the user interacts with the CTA. When planning for API volume, connect with the teams promoting the HRA to determine how much traffic they expect to drive to the HRAs. For a basic estimate, we recommend using 3.2 calls per completion, so if there are 300 HRA completions a day, there will be 960 estimated API calls per day.

## Data Mapping

Whenever possible, we deliver data into the Lead object using standard Marketo fields. Some data elements from the HRA are NOT part of the standard Marketo fields. Because of this, we provide a data dictionary that outlines custom field names that we look for when sending data. If the custom fields exist within the client's Lead record object, we will place information in the custom field. For cross-vendor and backwards compatibility, multiple custom field names are checked for in order and the first one that matches is where data is written. See the Formstack Data Dictionary for the most current set of fields available.

## Unique Key for Leads

Unlock provides clients with a choice of either using "Connection Id" as the unique key for leads. The unique key tells Formstack what field to look for and if it already exists update. Connection Id is a universally unique identifier for an HRA session, so if Connection Id is chosen, there will be a new Lead record for each HRA completion.