



**INTEGRATED
TECHNOLOGY
SERVICES**

Electronic and Digital Signatures (EDS) Project

Presentation for SDCOE Stakeholders
prepared by the ITS Division

AUGUST 4, 2020

Welcome!



Electronic Signature



Digital Signature

Introductions

What We've Been Working On

What's Next – RFP Timeline

Wrap Up

The purpose of this meeting is to review the **Electronic and Digital Signatures Project** with you, our SDCOE stakeholders. We are now at the step where we have drafted the RFP and would like to inform you of the work we have performed thus far and the next steps with the RFP (not yet published).

Trained SDCOE stakeholders on Electronic and Digital signatures

- **Key Points:**

- Electronic Signatures are mostly for low-medium risk/high volume documents. Less secure, but security enough to ensure transaction accurate.
- Digital Signatures are used for high risk documents, low volume documents. Highly secure. Mostly Legal binding documents (Contracts, Monetary transactions, etc.).

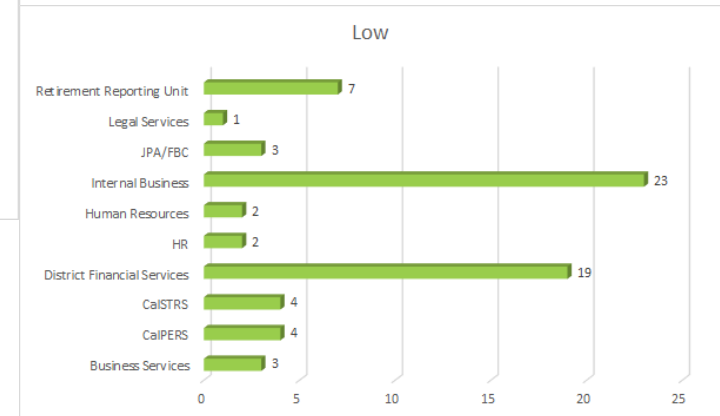
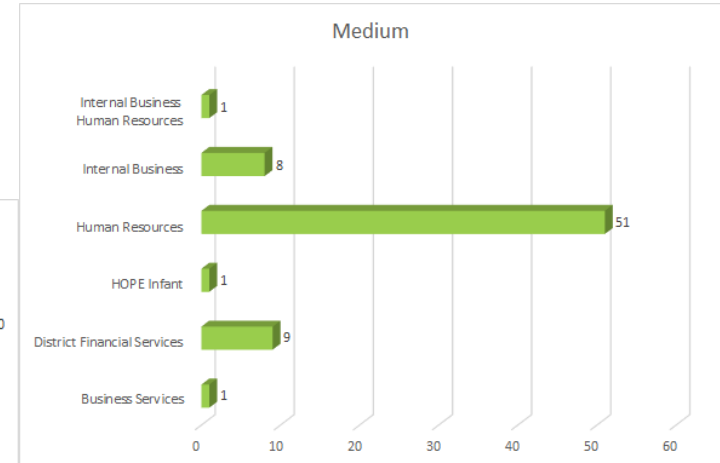
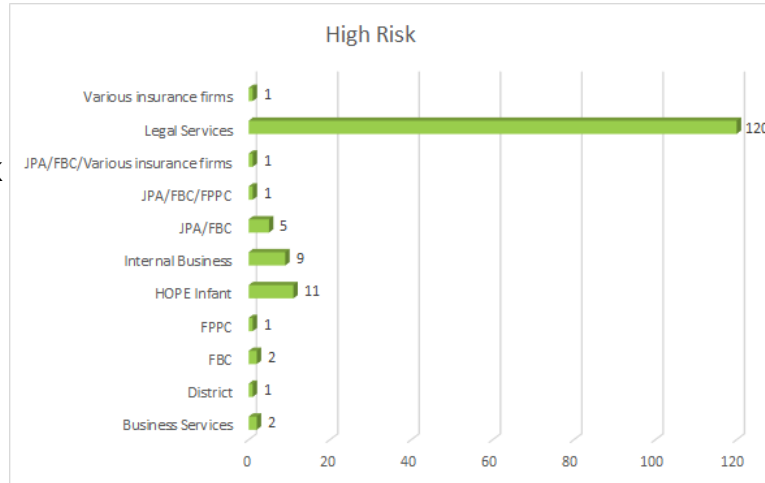
Conducted 10 meetings to collect information

- Purpose of meetings:
 - Collect existing forms and key attributes (who uses, purpose, risk, vital record)
- Audience:
 - Legal
 - HR
 - Business Services
 - Payroll
 - Retirement
 - Risk Management
 - HOPE Program

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
	Number (if any)	Name	Description	Owner	Creator	Year created/revise	Scanned or Data Entered into WYS System (if any)	Location	Risk level (high, medium, low)	Assessing Risk Level (e.g. \$Amount)	Vital record Y/N	Signature type (electronic, digital)	Signers (manager, ass. sup)	Multiple signers Y/N	Record
244		Cobra Letter	Benefits documents	Resources	Benefits		FIS	Medium		Y	Electronic	Employee	N	HR Re	
245		Families First Coronavirus Response Act Leave Request Form	Benefits documents	Human Resources	Benefits		FIS	Medium		Y	Electronic	Employee, Manager, Division Head, Human Resources	Y	HR Re	
246		COMET Membership Form	Benefits documents	Human Resources	Benefits		FIS	Medium		Y	Electronic	Employee	N	HR Re	
247		Hyatt MetLaw Enrollment Form (10/11 months)	Benefits documents	Human Resources	Benefits		FIS	Medium		Y	Electronic	Employee	N	HR Re	
248		Hyatt MetLaw Enrollment Form (12 months)	Benefits documents	Human Resources	Benefits		FIS	Medium		Y	Electronic	Employee	N	HR Re	
249		Evidence of Insurability Form (Hartford)	Benefits documents	Human Resources	Benefits		FIS	Medium/High (Researching)		Y	Electronic with a Date	Employee	N	HR Re	
250		Predesignation of Personal Physician Form	Benefits documents	Human Resources	Benefits		FIS	Medium		Y	Electronic	Employee	N	HR Re	
251		Workers Compensation Claim Form	Benefits documents	Human Resources	Benefits		FIS	Medium		Y	Electronic	Manager, HR Operations	Y	HR Re	
252		Supervisor's Report of Accident	Benefits documents	Human Resources	Benefits		FIS	Medium		Y	Electronic	Manager, HR Operations	Y	HR Re	
253		Universal Leave Request Form	Benefits documents	Human Resources	Benefits		FIS	Medium		Y	Electronic	Employee, Manager, Division Head, Human Resources, Superintendent	Y	HR Re	
254		Safety Training Certificate	Benefits documents	Human Resources	Benefits		FIS	Medium		Y	Electronic	Training Provider	N	HR Re	
255		Section 125 New Hire Interest Form	Benefits documents	Human Resources	Benefits		FIS	Medium/High (Researching)		Y	Electronic with a Date	Employee	N	HR Re	
256		Voluntary Life(ADBI)/Disability Form (Hartford)	Benefits documents	Human Resources	Benefits		FIS	Medium/High (Researching)		Y	Electronic with a Date	Employee	N	HR Re	
257		Basic Life Enrollment Form (Hartford)	Benefits documents	Human Resources	Benefits		FIS	Medium/High (Researching)		Y	Electronic with a Date	Employee	N	HR Re	
258		Vision Service Plan Enrollment Form	Benefits documents	Human Resources	Benefits		FIS	Medium/High (Researching)		Y	Electronic with a Date	Employee	N	HR Re	
259		Delta Dental Enrollment/Change Form	Benefits documents	Human Resources	Benefits		FIS	Medium/High (Researching)		Y	Electronic with a Date	Employee	N	HR Re	
260		Universal Enrollment/Change Form (Medical)	Benefits documents	Human Resources	Benefits		FIS	Medium/High (Researching)		Y	Electronic with a Date	Employee	N	HR Re	
261		Statement of Medical Non-Participation	Benefits documents	Human Resources	Benefits		FIS	Medium/High (Researching)		Y	Electronic with a Date	Employee	N	HR Re	
262		Health Benefit Cover Sheet	Benefits documents	Human Resources	Benefits		FIS	Medium/High (Researching)		Y	Electronic with a Date	Employee	N	HR Re	
263		Disability Verification Forms	Benefits documents	Human Resources	Benefits		FIS	Medium/High (Researching)		Y	Electronic with a Date	Employee	N	HR Re	

Collected forms in use at SDCOE

- 293 total forms
 - 154 High Risk
 - 71 Medium Risk
 - 68 Low Risk



Wrote needs assessment with recommendations

Current State (As-is)

- Documents
 - Printed and signed in person (wet signature)
 - PDF or Word documents filled out online
- Routing
 - Via interoffice mail
 - Via email

Future State (To-be)

- Documents
 - Completed and signed online
- Routing
 - Via system workflow

Determined a phased approach

Phase 1

Current State with Automated Signature

- Use current forms as is with electronic and digital signature technology

Phase 2

Future State

- Forms and business process evaluation
- Add forms that have not yet been catalogued

Phase 3

Full Automation State with Reengineered Business Process

- Automated workflow and system integration

Wrote the RFP

- Implementation Consultant
 - Full scale phased implementation of EDS technology
 - Configure system
 - Workflow for routing
 - Review and reengineering of existing forms into system compatible format
 - DocuSign
 - Docfinity
 - PeopleSoft
 - ServiceNow
 - Provide training
 - End user materials via train-the-trainer
 - Technical users
 - Provide post implementation support
- Consideration: We want to leverage existing platforms at SDCOE

What's Next?



Electronic Signature



Digital Signature

Aug 5-13, 2020

RFP review by Purchasing

Aug 14, 2020

Post RFP

TBA

Interviews and selection process

TBA

Begin project - *SDCOE stakeholder involvement will be critical!*

How we will involve the SDCOE stakeholders

**We cannot do
this project
without you!**

We will ask you to
be involved for
each phase of the
project

Provide your
expertise on the
forms that you own

Involvement
will include
meetings and
trainings

We will reach out
to you when we are
ready for next steps

There might be
more groups who
have forms that we
need to consider

**WRAP
UP**