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
Collected forms in use at SDCOE

- 293 total forms
  - 154 High Risk
  - 71 Medium Risk
  - 68 Low Risk
Wrote needs assessment with recommendations

<table>
<thead>
<tr>
<th>Current State (As-is)</th>
<th>Future State (To-be)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Documents</td>
<td>• Documents</td>
</tr>
<tr>
<td>• Printed and signed in person (wet signature)</td>
<td>• Completed and signed online</td>
</tr>
<tr>
<td>• PDF or Word documents filled out online</td>
<td>• Routing</td>
</tr>
<tr>
<td>• Routing</td>
<td>• Via system workflow</td>
</tr>
<tr>
<td>• Via interoffice mail</td>
<td></td>
</tr>
<tr>
<td>• Via email</td>
<td></td>
</tr>
</tbody>
</table>
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?

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aug 5-13, 2020</td>
<td>RFP review by Purchasing</td>
</tr>
<tr>
<td>Aug 14, 2020</td>
<td>Post RFP</td>
</tr>
<tr>
<td>TBA</td>
<td>Interviews and selection process</td>
</tr>
<tr>
<td>TBA</td>
<td>Begin project - <em>SDCOE stakeholder involvement will be critical!</em></td>
</tr>
</tbody>
</table>
How we will involve the SDCOE stakeholders

We cannot do this project without you!

Involvement will include meetings and trainings

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

Provide your expertise on the forms that you own

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