WHY: Imagine a day when you can sign documents electronically from the comfort and safety of your own home without the need to go into the office. Imagine the system is easy to use, convenient, fast and secure. Visualize your documents being processed faster, more efficiently, and that you have visibility to where your documents are in the workflow. That day is almost here!

PURPOSE: The Integrated Technology Services (ITS) division is working on a cross-division project to select and purchase software that SDCOE staff can use for electronic and digital signatures. ITS has partnered with HR, Business Services and Legal to research the best solution that will meet everyone’s needs. Today’s presentation will provide an overview of what has been accomplished, as well as next steps.
What are Electronic and Digital Signatures?

• Key Points:
  • **Electronic Signatures** are mostly for low-medium risk/high volume documents. Less secure, but secure enough to ensure the transaction is accurate. 99% of forms used in SDCOE are electronic (per Legal dept opinion)
  • **Digital Signatures** are used for high-risk documents, low volume documents. Highly secure. Mostly legally binding documents such as contracts, monetary transactions, etc.

Activity

Think about a time outside of work when you had to use an electronic or digital signature.
Conducted 10 meetings to collect information

- **Purpose of meetings:**
  - Collected existing forms and key attributes (who uses the form, purpose, risk, vital record)

- **Audience:**
  - Legal
  - HR
  - Business Services
  - Payroll
  - Retirement
  - Risk Management
  - HOPE Program
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
Conducted demos and prepared findings

• Four vendor demos were held on October 7 and 9 to determine a product/vendor for electronic and digital signatures
• Nine scorers from ITS, Legal, Business Services, and HR met in mid-October to consolidate scores from the vendor demos
• Reference calls were made about integrations and the products
• A final recommendation was presented to our CTO
• We researched, discussed, and prepared findings on: (1) the functionality of document management systems, (2) document portability, (3) migrating off of an EDS system, and (4) pricing quotes
## What's Next?

<table>
<thead>
<tr>
<th>Date</th>
<th>Task Description</th>
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<tbody>
<tr>
<td>Feb 1-12, 2021</td>
<td>Conduct informational meetings with each division</td>
</tr>
<tr>
<td>Feb 19, 2021</td>
<td>Deadline for all divisions to submit data</td>
</tr>
<tr>
<td>Mar 1-5, 2021</td>
<td>Review and follow up with staff, as needed</td>
</tr>
<tr>
<td>Mar 8-26, 2021</td>
<td>Analyze responses</td>
</tr>
</tbody>
</table>
How we will involve SDCOE administrative staff

We cannot do this project without you!

Involvement will include meetings and trainings

Provide your expertise on the forms that you own

We will ask you to be involved with the next step of the project

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

Organizational Change Management is crucial for the success of the project
Review Spreadsheet & Examples
Q&A / Wrap Up