

# Electronic and Digital Signatures (EDS) Informational Meeting

Presentation for SDCOE Administrative Staff  
prepared by the ITS Division

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# Welcome!



Electronic Signature



Digital Signature

Introductions

What We've Done

What's Next

Review Spreadsheet

Review Examples

Q&A / Wrap Up

**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

|     | 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 What System (if any) | Locatio | Risk level (high, medium, low) | Assessing Risk Level (e.g., \$Amount) | Vital record Y/N | Signature type (electronic, digital) | Signers (manager, assist, supp)                                   | Multiple signers Y/N | Record retention source |
| 244 |                 | Cobra Letter   | Benefits documents | Human Resources | Benefits |                     | FIS   |         | Medium                         |                                       | Y                | Electronic                           | Employee  | N                    | HR Record               |
| 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 Record               |
| 246 |                 | COMET Membership Form                                      | Benefits documents | Human Resources | Benefits |                     | FIS   |         | Medium                         |                                       | Y                | Electronic                           | Employee  | N                    | HR Record               |
| 247 |                 | Hyatt MetLaw Enrollment Form (10/11 months)                | Benefits documents | Human Resources | Benefits |                     | FIS   |         | Medium                         |                                       | Y                | Electronic                           | Employee  | N                    | HR Record               |
| 248 |                 | Hyatt MetLaw Enrollment Form (12 months)                   | Benefits documents | Human Resources | Benefits |                     | FIS   |         | Medium                         |                                       | Y                | Electronic                           | Employee  | N                    | HR Record               |
| 249 |                 | Evidence of Insurability Form (Hartford)                   | Benefits documents | Human Resources | Benefits |                     | FIS   |         | Medium/High (Researching)      |                                       | Y                | Electronic with a Date               | Employee  | N                    | HR Record               |
| 250 |                 | Prerequisite of Personal Physician Form                    | Benefits documents | Human Resources | Benefits |                     | FIS   |         | Medium                         |                                       | Y                | Electronic                           | Employee  | N                    | HR Record               |
| 251 |                 | Workers Compensation Claim Form                            | Benefits documents | Human Resources | Benefits |                     | FIS   |         | Medium                         |                                       | Y                | Electronic                           | Manager, HR Operations  | Y                    | HR Record               |
| 252 |                 | Supervisor's Report of Accident                            | Benefits documents | Human Resources | Benefits |                     | FIS   |         | Medium                         |                                       | Y                | Electronic                           | Manager, HR Operations  | Y                    | HR Record               |
| 253 |                 | Universal Leave Request Form                               | Benefits documents | Human Resources | Benefits |                     | FIS   |         | Medium                         |                                       | Y                | Electronic                           | Employee, Manager, Division Head, Human Resources, Superintendent | Y                    | HR Record               |
| 254 |                 | Safety Training Certificate                                | Benefits documents | Human Resources | Benefits |                     | FIS   |         | Medium                         |                                       | Y                | Electronic                           | Training Provider   | N                    | HR Record               |
| 255 |                 | Section 125 New Hire Interest Form                         | Benefits documents | Human Resources | Benefits |                     | FIS   |         | Medium/High (Researching)      |                                       | Y                | Electronic with a Date               | Employee  | N                    | HR Record               |
| 256 |                 | Voluntary Life/AD&D/Disability Form (Hartford)             | Benefits documents | Human Resources | Benefits |                     | FIS   |         | Medium/High (Researching)      |                                       | Y                | Electronic with a Date               | Employee  | N                    | HR Record               |
| 257 |                 | Basic Life Enrollment Form (Hartford)                      | Benefits documents | Human Resources | Benefits |                     | FIS   |         | Medium/High (Researching)      |                                       | Y                | Electronic with a Date               | Employee  | N                    | HR Record               |
| 258 |                 | Vision Service Plan Enrollment Form                        | Benefits documents | Human Resources | Benefits |                     | FIS   |         | Medium/High (Researching)      |                                       | Y                | Electronic with a Date               | Employee  | N                    | HR Record               |
| 259 |                 | Delta Dental Enrollment/Change Form                        | Benefits documents | Human Resources | Benefits |                     | FIS   |         | Medium/High (Researching)      |                                       | Y                | Electronic with a Date               | Employee  | N                    | HR Record               |
| 260 |                 | Universal Enrollment/Change Form (Medical)                 | Benefits documents | Human Resources | Benefits |                     | FIS   |         | Medium/High (Researching)      |                                       | Y                | Electronic with a Date               | Employee  | N                    | HR Record               |
| 261 |                 | Statement of Medical Non-Participation                     | Benefits documents | Human Resources | Benefits |                     | FIS   |         | Medium/High (Researching)      |                                       | Y                | Electronic with a Date               | Employee  | N                    | HR Record               |
| 262 |                 | Health Benefit Cover Sheet                                 | Benefits documents | Human Resources | Benefits |                     | FIS   |         | Medium                         |                                       | Y                | Electronic with a Date               | Employee  | N                    | HR Record               |
| 263 |                 | Disability Verification Forms                              | Benefits documents | Human Resources | Benefits |                     | FIS   |         | Medium/High (Researching)      |                                       | Y                | Electronic with a Date               | Employee  | N                    | HR Record               |

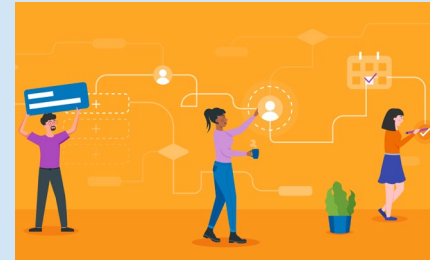
# Wrote needs assessment with recommendations

## 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?



Electronic Signature



Digital Signature

- 
- |                       |   |
|-----------------------|---|
| <b>Feb 1-12, 2021</b> | Conduct informational meetings with each division |
| <b>Feb 19, 2021</b>   | <b>Deadline for all divisions to submit data</b>  |
| <b>Mar 1-5, 2021</b>  | Review and follow up with staff, as needed        |
| <b>Mar 8-26, 2021</b> | Analyze responses                                 |
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# How we will involve SDCOE administrative staff

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

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

Provide your  
expertise on the  
forms that you own

Involvement  
will include  
meetings and  
trainings

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**