

CUSP (CU I&E) Submission: DocuSign ^[1]

Description

The University is always looking for ways to cut costs and drive greater levels of efficiency while still maintaining high levels of customer service. An accepted part of doing business at the university necessitates distributing, signing, and collecting a mountain of forms and documents. Missing or delayed signatures can have a true cost to the University, but in the past, tracking signatures could be a very labor-intensive, manual process.

DocuSign is a cloud-based electronic signature platform which accepts all common file formats for documents (PDF's, Word, Excel, etc.) and allows users to upload and route these documents for approvals and signatures. DocuSign documents contain signatures which are legally binding, and the cloud-based platform operates under the highest standards of security in the industry.

How does this impact the University?

Many University processes require multiple forms to be completed, signed, routed, and archived. The DocuSign platform streamlines every step of this process. The web-based interface allows users to conduct business digitally anytime, anywhere, on any device. By replacing formerly paper-intensive processes, this new tool streamlines the document routing and approval processes for numerous constituents throughout the University community.

The introduction of e-signatures has:

- **ACCELERATED WORKFLOW** (Increased efficiency and cost savings through reduction in printing, scanning and faxing volume; reduced turnaround times; and automated workflow processes)
- **INCREASED TRANSPARENCY** (Reduced the risk of non-compliance through error proofing functionality, version control and information security)
- **ACCELERATED RESPONSE TIME** (Provided the ability to route documents to multiple recipients, build customer forms, and sign documents from mobile devices)
- **SUPPORTED SUSTAINABILITY** (Reduced the amount of paper being used on campus)

Implementation Status

In 2013, Mike Murray was charged with the task of researching and proposing an electronic signature solution for the University. Mike and his team developed and sent out a Request for Proposals (RFP). Several e-signature platforms responded to the call, and after careful financial and operational analysis, DocuSign was selected as the University's preferred vendor.

The CU-Boulder Human Resources division is arguably one of the most document intensive—and paper-intensive—departments at the University, so it made sense for that department to trial the platform first, before launching the product university-wide. In September 2013, a small group of staff from the CU-Boulder Human Resources group began beta testing the platform. The entire department is now using the platform to route documents for signatures and approvals during the hiring process, employee onboarding, and performance management processes, amongst others.

The benefits of the system were immediately recognized and the beta group quickly expanded beyond the original group. Numerous University departments have recently started using the platform for all sorts of approvals, spending authorizations, contract management, and more.

On July 1, 2014, the Administrative Policy Statement (APS) on Electronic Signatures and Transactions was revised, stating, "University administrative processes shall provide for the use of electronic transactions to conduct official university business whenever possible." The timing of this announcement was perfect for Mike and his team, as the DocuSign platform was fully vetted and ready to expand to the larger University community. Since Chancellor Di Stefano's mention of the APS at the 2014 town hall meetings, more than 700 individual users from quite a few campus departments and divisions have been trained on, and are now utilizing the DocuSign platform.

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