

UCSB GUIDANCE ON DOCUSIGN

March 16, 2020

DocuSign is UC Santa Barbara's e-signature solution that makes approving, signing, and initialing documents a secure, efficient, and paperless process. With the recent official campus endorsement of e-signature (referenced below), this guide is to provide you insight and resources to get you started.

The Process Innovation Team, within the College of Letters & Science IT, has developed a "train-the-trainer" approach in serving the UCSB community (faculty and staff employees) through the administration, training, and support of this subscription. We are now conducting higher education business activities through viewing documents, signing documents, creating templates, and sending envelopes for e-signature.

We are here to inspire, facilitate, and serve a DocuSign Community of Practice through peer learning while encompassing the exchange of ideas and best practices. Please reach out to us to learn how over 600 early campus adopters are digitizing business processes through the use of DocuSign.

GETTING STARTED

UCSB DOCUSIGN ACCOUNT ACCESS

Sign in to docusign@ucsb.edu using your UCSBnetID@ucsb.edu. UCSB employees are auto-provisioned to the UCSB DS Sender role.

ACCOUNT ROLES

UCSB DS Signer

If you receive an envelope but have not activated your account, you will be assigned a UCSB signer role.

UCSB DS Sender

UCSB employees who send digital documents for internal or external signature/approval. (Auto-provisioned to this access level once signed in). For help on getting started, visit - <https://docusign.lsit.ucsb.edu/using-docusign#project>.

UCSB DS Author

UCSB employees who create forms and build templates for senders. Authors are generally **the process owner** and may create templates for shared use (ie: BFS, HR). We suggest departments assign one or two employees for this role to create recurring forms/documents.

TRAINING

Additional training is required to gain AUTHOR access as well as use of the demo/sandbox account.

The following training sessions have been scheduled for your convenience:

ZOOM TRAINING - Wednesday, March 18th

<https://ucsb.zoom.us/j/863084071> (used for each session)

10:00a - 10:45a

HOW TO CREATE FORMS

11:00a - 12:00noon

BULK SEND (Advanced feature)

If you cannot make these offerings, please request AUTHOR access at DocuSign@ucsb.edu. We will provide links to self-paced courses at DocuSign University.

Once you complete the DocuSign courses or Zoom offerings, we will:

1. Give you AUTHOR access in the UCSB DocuSign Demo account. We recommend using the Demo account for testing a new process before moving to production. Templates can be downloaded and uploaded between the accounts.
2. Promote you to the AUTHOR role in the UCSB DocuSign Production account.

For additional questions or assistance, please contact us...we are here for you!

The Process Innovation Team, LSIT

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UCSB's Official Endorsement of e-Signatures from campus CIO, Matthew Hall, campus Assistant Chancellor, Chuck Haines, and Vice Chancellor of Administrative Services, Garry MacPherson dated March 11, 2020:

"Since 1999, Laws enabling the legal use of electronic signatures passed in several countries, including the U.S., Canada, the U.K., and other members of the EU. The Electronic Signatures in Global and National Commerce Act (ESIGN) passed in the United States in 2000. This federal law grants legal recognition to electronic signatures and records if all involved parties agree to use electronic documents and sign them electronically.

At UCSB, we comply with regulations and practices to ensure the legality, reliability, and security of every electronic signature created, captured, and stored in the conduct of our business activities. The benefits of electronically signed or acknowledged documents or internal workflow include paper reduction, business efficiency, and a reduced administrative workload and overhead on our students, faculty, and staff.

UCSB's Chief Information Officer and Associate Chancellor for Finance and Resource Management fully endorse the use of electronic signatures in both legally binding transactions and to acknowledge and sign off on internal management control processes, paper forms elimination, and business workflows."