eSignatures

Enterprise-wide DocuSign Services for UW

Service Overview

UW-IT Enterprise Document Management

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eSignatures

eSignatures provides enterprise-wide DocuSign services to UW departments.

eSignatures allows users to:

> Easily upload and send documents for electronic signature

> Securely access and sign documents

> Check on a document status, send reminders, view audit trails

> Securely store online via integrations with a document repository such as our Document Management Solution

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Key Capabilities

> **Send:** easily upload and send documents for electronic signature

> **Receive:** signers inside and outside UW can quickly access and sign documents, no need to create accounts

> **Manage:** check document status, use templates to save and reuse settings for commonly sent forms

> **Routing**: used to route documents for approval

Service Overview

Usage

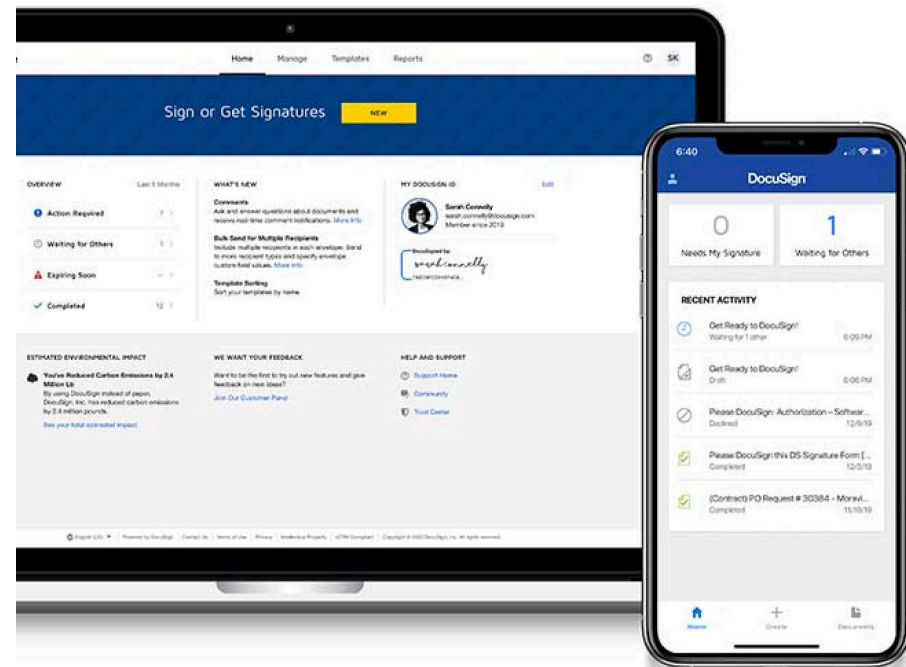> Sending, receiving, and managing electronic signatures

> Simple workflows

Tool

> Powered by DocuSign

Cost

> Offered at no cost to departments

Who can use this service?

> UW staff and faculty

Frequent Use Cases

> **One-off documents** sent once by a specific person in the office to known signer(s)
>   - E.g., purchasing contracts, license agreements

> **Templated documents** sent by a specific person to different, known signers each time
>   - E.g., change of major forms, financial aid documents

> **Info-gathering templated documents** sent by a specific person to different, known signers
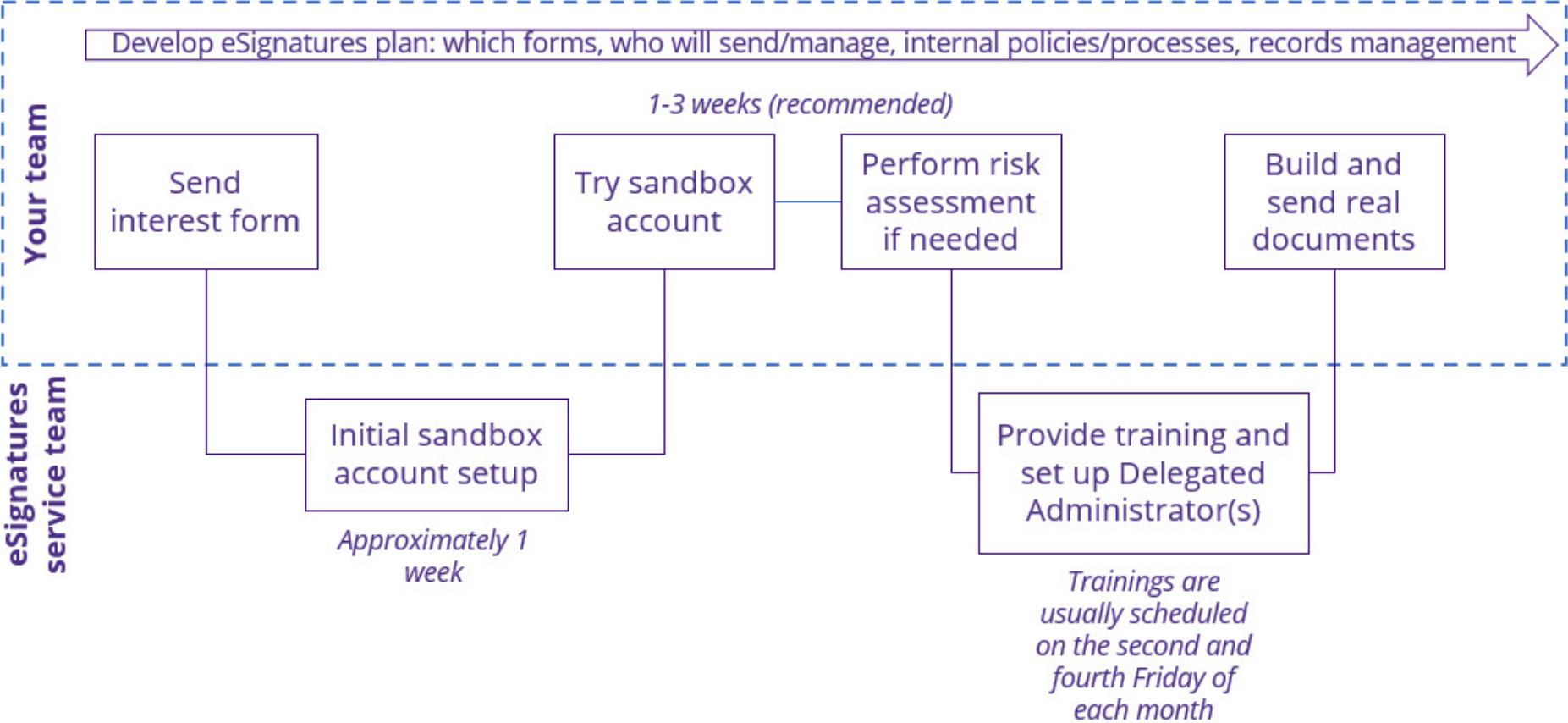>   - E.g., annual performance evaluations, hybrid work agreements

Use Considerations

The University encourages the use of eSignatures wherever such use complies with all applicable laws and regulations and does not cause undue risk.

> Each unit may create a policy and document its use cases for eSignatures, including:

– Risk analysis

– Requirements for a valid electronic signature

Onboarding

Your team

Develop eSignatures plan: which forms, who will send/manage, internal policies/processes, records management

1-3 weeks (recommended)

Send interest form

Try sandbox account

Perform risk assessment if needed

Build and send real documents

eSignatures service team

Initial sandbox account setup

Approximately 1 week

Provide training and set up Delegated Administrator(s)

Trainings are usually scheduled on the second and fourth Friday of each month

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Getting Started

Visit the IT Connect page: eSignatures

> Coordinate internally
> Choose a few simple forms as a starting point
> Think through the business process
> Identify a responsible party for your team, called a "Delegated Admin(istrator)" in DocuSign language
> Start the onboarding process by submitting an eSignatures Interest Form

Training and Self–Service Guides

> **Training**

  – Centrally provided UW-specific training

  – Additional training available from DocuSign

> **Support**

  – Self-service model for envelopes, templates, etc.

  – Biweekly eSignatures Office Hours

  – On-demand support via eSignatures Help

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General Contact Information

eSignatures

IT Connect: eSignatures

Forms & Support
> eSignatures Interest Form
> eSignatures Help

UW Record Management Services (RMS)
To better understand your retention policies, refer to the RM Services – About Us page to connect with an expert.