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Digitizing Processes Across Campus with eSignature

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DocuSign

Whitepaper

Digitizing processes across campus with eSignature

Serve students, retain staff and secure information

Current trends on campus

Over the past two years, e-signature has become a critical component of processes in higher education institutions. Teaching and administration are now at least partially remote at many schools, and electronic signatures have helped ease both students and staff into a new academic norm. Yet the pandemic has also brought new challenges.

There's now fierce competition to attract and retain students. Fewer people graduate from high school today, and those who do often decide to pursue vocational training, online certifications and even virtual "professional" degrees—sometimes from nonaccredited schools. Even before tuition became capped, the financial commitment required of students by nearly any university gave most pause in terms of applying.

And nowhere is the Great Resignation more pronounced than in colleges and universities. The median salary increase for all higher education professionals was less than half of the inflation rate in 2021-2022.

Fifty-five percent of respondents in a recent Educause survey stated they've already left their current position or are seriously thinking about it.

Add to this the decline of available federal grant dollars and the instability of donor commitments, and a mandate to economize anywhere you can becomes a top priority.

Digital transformation inherent in e-signature workflows addresses many of the operational and administrative challenges that higher education institutions currently face. DocuSign recently completed research involving 159 professionals at higher education institutions. Each has expanded their eSignature usage, both in breadth across university departments, and in depth using add-on applications. As a result, they've seen staff-retention, efficiency and cost improvements.

99%
of survey respondents report greater productivity and efficiency

96%
see a significant uptick in data quality

DocuSign



How to fully leverage DocuSign eSignature

DocuSign



45%
decrease in time processing financial aid agreements

41%
decrease in time processing student applications

"Our goal was to be more effective and efficient, and to increase student engagement. We wanted to make every interaction a positive experience."

University of Colorado Boulder

Attract the best students

Attracting students is more competitive today than ever before. More creative, attractive offers than yours could be right around the corner—and schools that offer a modern student experience will likely corner the student market.

How can you position your institution as a viable educational alternative? Start by simplifying through digitization of application, financial aid and onboarding processes. You must also ensure a consistent experience from laptop to tablet to phone whenever a student logs on.

A branded digital experience goes a long way in attracting your most promising students, as speed and convenience are paramount considerations. Of those institutions surveyed, most realized a 41 percent reduction in enrollment application processing time with eSignature. But you can do even more.

You can also make the financial aid application process smoother. SMS delivery sends reminder text messages to students when it's their or their parents' turn to complete financial aid information or an e-signature field during an agreement process. Signers just tap a link in the text, and they're taken to the online page where they need to sign. Plus, responsive signing allows form completion on any tablet or phone.

Our survey shows that digitizing these processes can decrease financial aid processing time by up to 45 percent.

DocuSign



37%
reduction in student paper agreements

34%
improved student experience

> **"After adopting DocuSign, we saw an improved student experience."**
>
> Higher Education Director
> Academics & Registrar

Modernize student services

Attracting your ideal student is one thing. Retaining them for the full duration of the student lifecycle is quite another. From freshman orientation through graduation, there are many opportunities for you to put easy, intuitive technology forward.

The time and cost involved in maintaining paper-based processes aren't always obvious, but they can be significant. Respondents to our survey were able to cut student-related paper agreements by an average of 37 percent, and boost the student experience by 34 percent.

Secure student housing
Any process that needs to be initiated across a campus can now be digitized—including procurement of student dormitory or other campus housing. Students can track and sign residential agreements right from their tablets or phones with responsive signing.

Access health and medical services
Students can have confidence in medical agreements initiated through a Student Health Service Center. DocuSign eSignature can help medical staff meet Health Insurance Portability and Accountability Act (HIPAA) obligations.

Adjust classes
Students can easily add, drop or apply to audit classes through embedded, enhanced eSignature forms within student or class portals.

DocuSign



30%
decrease in time to onboard new employees

33%
improved staff agreement experience

> **"Our users are thrilled with DocuSign. It's a better, faster and more efficient experience for all."**
>
> Rowan Cabarrus Community College

Recruit and retain faculty

How do you keep the excellent staff and faculty you have, as well as take advantage of prospective talent you may be able to pursue? Establishing a modern, digital onboarding process is a great place to start in attracting new, qualified professionals. Signing a letter of intent or offer is a fully digital process with eSignature, and can be done right from a signer's tablet or phone.

Your HR department's onboarding process will uplevel too. Now that more HR staff and other faculty work remotely at least part of the time, in-person contract signing is a relic of the past. eSignature can fully automate the process, speeding signing by notifying all involved through SMS reminders when a contract is opened. The digital process also makes archiving contracts easier, since you won't have to scan documents for safekeeping. Of those institutions we surveyed, most experienced a 30 percent average decrease in new-hire onboarding time.

In terms of retaining valuable staff, eSignature makes signing existing employee agreements faster and more secure, as well. You can send out the same agreement to multiple signers with bulk send, and use advanced security protocols to ensure that documents are signed appropriately.

A branded digital experience throughout a staff member's tenure contributes to school loyalty, especially if speed and convenience are at the forefront of each employee action. Create university-branded documents with pre-made or custom templates once, then store in a central digital repository for repeat use. Our survey respondents saw an average 33 percent improvement in staff agreement experience with eSignature.

DocuSign



1–3 days
reduction in agreement turnaround time

42%
less time to send documents out for signing

> **"Organization and time management have improved significantly, as each document within DocuSign shows the progress of the signatures. This way we can follow up with individuals if something is urgent."**
>
> Higher Education
> Finance Leader

Secure donations and gifts

As grant monies dwindle and major gifts decrease—or at times, fall through completely—securing the funding you can access is a top priority. Delivering a fast, smooth agreement process can put your institution ahead of the competition.

Of the advancement professionals we surveyed, 58 percent saw an increase in gifts processed while using eSignature. Contributing to this: Institutions were able to shave 1-3 days from financial agreement processing time.

Here are a few ways your school can win:

Expedite donations
Now more than ever, fundraisers must be donor-centric and leverage technology to reach, solicit and steward your donors. Fundraisers as virtual events? It's now more common than you think. eSignature and its ancillary applications can help you automate an electronic pledge sheet within the virtual experience.

Streamline the major gift process
Your advancement office and other stakeholders, such as a dean, treasurer or legal counsel, can review, redline and approve a major gift agreement, and the bequestor can do the same. Once an agreement is final, downstream processes like SMS alerts for signatures, centralized storage and version control can all happen.

DocuSign



36%
improved visibility into signing status

36%
Improved document completion rates

Expedite research agreements

Research by both staff and by students contracting with outside firms is critical for the advancement of university thought leadership in areas such as biophysics, immunology, neurochemistry and more.

Providing a modern system of agreement that allows for tracking, transparency, collaboration and automation can take your research capabilities to the next level. Those involved tend to be university research administrators, corporate administrators and academic faculty charged with mentoring research and graduate students.

Define areas of responsibility through an MSA
Usually initiated by your academic institution, a master services agreement (MSA) outlines areas of responsibility, deliverables, timelines and any exemptions from liability either the corporate entity involved or your school may require. Once signed and countersigned, these documents are recognized by courts in most jurisdictions worldwide.

Access enterprise labs for research
Contracts conducted by outside firms often employ graduate-level students as researchers. In order to access the facilities—where tests can involve animal or human subjects, or toxic chemicals—students must present a notarized proof of college enrollment, which can now be done remotely through DocuSign Notary.

Commercialize university research ideas into products and startups
Technology transfer teams support faculty and students by providing input on how to best align inventions with market needs and guide them through the disclosure, patent and licensing agreement process—at times spinning these inventions into startup ventures. They're responsible for negotiating the numerous agreements that protect these inventions and the revenues they generate, often through e-signature.

DocuSign



↓ Reduced time, costs and paperwork

↑ Improved experience for HR staff

"DocuSign Notary gives us more flexibility—so, in the future, when we talk about staying fully remote or mostly remote, we have a process that can work in any scenario."

HR Director
Valencia College

Bring notarizations online

Fifty percent of college professors surveyed plan to keep more than 25 percent of their classes online, as a post-pandemic status quo.* Nationwide, academic administrative functions such as document notarization are following this pattern as well.

Notary enables the remote notarization of student and staff documents via an encrypted audio-visual session where a notary can meet signers virtually.

For students

Gain proof of coursework and enrollment
The most common use of notarization on campuses today is proof of coursework, which usually involves students returning to their home country or relocating to another country. They often need notarized confirmation of classes completed for transfer credit.

For faculty and staff

Authenticate restricted-access tokens
Some students and staff need access to sensitive campus technologies or restricted areas—such as labs and vehicle test sites—to perform research. Remote online notarization allows administrators to easily notarize the tokens themselves, as well as their supporting documents.

For third parties

Confirm degrees earned
Sadly, fraud is prevalent on a number of résumés these days. Companies often need to verify a prospective employee's degree through a notarized copy of their diploma before extending an offer.

DocuSign



"There is a great improvement in data quality of signed files."

Higher Education Director
Information Technology

Control e-signature use and lower risk

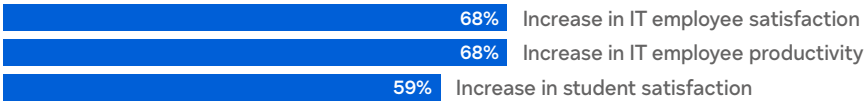
What's the goal for higher education IT departments around agreements? Having a single source of truth. There's also a cost savings from expediting agreements through one subscription, and storing them all in a central repository.

When individual e-signature accounts spring up across the institution's domain, costs increase because economies of scale aren't in place. Plus, you have no oversight over who is using which parts of the technology and for what reasons—leaving you with zero control over levels of access. If a staff member resigns from the school yet retains permissions around sensitive information, your security and compliance risk levels suddenly go up.

Those IT professionals we surveyed who use eSignature and its enhancements are able to centralize management of users, accounts and single sign-on (SSO). They can search for a user across all accounts and domains, then centrally manage that user's permissions.

Sixty-eight percent of the professionals we surveyed saw an increase in both IT employee satisfaction and productivity.

How eSignature expansion benefits IT departments



DocuSign



70%
reduction in traditional purchasing workload

>$5
reduction in agreement cost

> **"We saw a 70 percent reduction in our traditional workload just because we weren't shuffling paper. We've re-tasked staff with work that is of higher value to the university."**

Paul Bowman
Director of Purchasing Services
Utah State University

Manage procurement more efficiently

A digital buying experience can go a long way in establishing resilient, successful business relationships with university suppliers. It can also shift your people from doing busywork that's potentially error-prone to work that's much more strategically meaningful.

The procurement professionals we surveyed saw a 70 percent decrease in their traditional workload with expanded adoption of eSignature. Additionally, their cost savings in processing purchase agreements were substantial—more than $5 per agreement, on average.

Some usage examples:

Streamline SOWs and POs
When you issue statements of work and purchase orders to vendors, you'll usually go through a few rounds of revision—especially if the documents need to route through a legal department on either side. eSignature and its responsive signing feature can quickly expedite versions and approvals.

Comply with software license agreements
Since most software vendors want your students to use their software from an early age, you can usually buy software in bulk at a reasonable price. But you still need to manage involved assets correctly. And usage compliance rules apply, always. Count on eSignature to help you manage both your contracts and their compliance with ease.

DocuSign



Introducing the DocuSign Agreement Cloud for Higher Education

Deliver the ultimate digital experience

Given the current economic climate on campus, now is the time to further advance your systems and redesign your workflows.

At most schools, paperwork has evolved from maneuvering hard copies to embedding PDF forms on university websites. While it's a great start, it's not a complete digital transformation. This is where the Agreement Cloud comes in—to truly streamline the digital experience and create seamless information flows across your institution and beyond.

The DocuSign Agreement Cloud is a suite of applications that helps organizations automate and connect how they prepare, sign, act on and manage agreements.

Prepare

DocuSign Gen for Salesforce
Automate many campus processes by embedding eSignature within your Salesforce instance using Gen. Initiate agreements right within the CRM, saving you time, hassle and clicks.

Sign

DocuSign Identify
Make sure students, donors and alumni are who they say they are. Authenticate a signer's identity with Identify, a platform of enhanced identification and authentication products including ID Verification, phone and SMS authentication, knowledge-based authentication (KBA) and other 3rd party ID methods.

Guided Forms
An intuitive graphical interface—complete with markers that explain what to do at every step in an agreement—Guided Forms auto-completes fields with student or staff details stored in the university database and information they've completed on other website forms, speeding up the process.

Conditional routing
If a group of sequential signers is specified in an agreement, Conditional routing allows you to set rules to bypass some, if others in the sequence are qualified and more available.

Act

DocuSign Payments
Payments enables students to easily pay tuition balances during final admission or financial aid agreement signing. Payment is handled online, right within the document process. Donors can also use Payments to securely transfer funds to your school during the e-signature process.

Agreement actions
Your procurement people can streamline the yearly audits most software companies conduct on multi-seat software deployments—as well as the new agreement re-ups that result—with agreement actions.

Manage

DocuSign CLM
CLM delivers a holistic contract management process that helps advancement teams dramatically optimize and secure the major gifts process—and any other major contract process.

DocuSign Monitor
IT can increase agreement-security operations through activity tracking. Monitor delivers nearly real-time alerts when unauthorized access of a document occurs, and uses advanced analytics to track eSignature web, mobile and API account activity across the organization.

Organization management
Also a huge help for IT, Organization management enables central management of users, accounts and Single Sign-On (SSO). Protect institutional assets with the security of SSO, domain-level controls and administration of all users from a single interface.

Agreements drive higher education

You'll find agreements everywhere on today's campuses. eSignature and Agreement Cloud applications can make all of them easier.

Front office

Admissions & financial aid
Enrollment applications
Decision and award letters
Verification forms
Campus housing application
Application fee payment
Admission deferral form
FAFSA form
Institutional financial aid form
State financial aid form

Campus life
Meal plan agreements
Occupancy agreement
Title IX reporting form
Transfer roommate request
Campus police forms
Parking permit application
Health services & medical
Student organization application
Greek life forms
Student government forms

Academics & registrar
Transcript request form
Add/drop form
Declaration of major/minor
Records request form
Internship proposal agreement
Independent study proposal
Part-time student petition
Academic overload request
External credit
Equivalency form
Request to graduate

Alumni relations
Alumni membership form
Donation requests
Fundraising forms
Diploma & certificate reissue requests
Student career relations: non-disclosure agreements
Student loan deferment forms
Reunion reimbursements

Advancement
Letters of intent
Gift agreements
Prospect research documentation
Alumni relations/alumni association reports
Gift and planned giving proposals
Gift/pledge agreement
Planned giving agreement
Letter of intent
Endowment reports
Impact reports
Amendments

Back office

Human resources
Offer letters
New hire paperwork
Candidate NDA
On/off-boarding agreements
Employee policy agreements
Performance appraisal
Compensation plans
Equity/stock grants

Legal
NDAs
Contract management
Internal compliance
Shareholder agreements
Licensing agreements
Patent applications
Memoranda of understanding

Procurement
Master service agreements
Purchase orders
Statements of work
RFP/RFQ/RFI sign off
Vendor contracts
Supplier compliance
Service level agreements
Software license agreements

IT/Operations
Asset tracking
Change requests
Requirements sign off
Access management
Incident reporting
Production change authorization
Maintenance authorization
Real estate approval

Finance
Invoice processing
Expense processing
Capitalization management
Audit sign off
Policy management
Asset transfer/retirement
Grant applications
Inventory sign off

DocuSign



94%
average reduction
incompliance errors

"You have a verified signature, which is always the safest route."

Higher Education Professor
Student Services

Manage compliance

Though 51 percent of compliance leaders still feel the higher education regulatory environment is way too complex,** DocuSign solutions have been able to help institutions decrease compliance errors by an average of 94 percent.

Integral to this is adherence to HIPAA regulations when students and staff take advantage of medical services performed on campus. DocuSign eSignature can help Student Health Center staff support HIPAA compliance, and the software's tamper-proof audit trail helps oversee digital compliance while streamlining patient processes.

DocuSign is also fully committed to accessibility compliance. Our site addresses the federal mandate that promotes comfortable access for visually impaired and blind students and staff, called the Voluntary Product Accessibility Template or VPAT.

Users can easily:

- Take the site into screen reader mode, for an audio experience of text
- Rely on full-function access from keyboard controls
- Activate high-contrast type and background choices
- Replace visuals with audio descriptive text

DocuSign



55 billion
sheets of paper saved

6 million
trees saved

Save the planet

Global warming and deforestation are top of mind for many universities and colleges today. Quite a few have launched green initiatives to do all they can to help facilitate climate control. We're right there with you.

From our very beginning, environmental sustainability has been an important part of the DocuSign story. eSignature alone has replaced billions of pieces of paper, along with significant amounts of the waste, water, carbon and wood required to make that paper. This core strength—along with our belief that DocuSign has an important role in creating a low-carbon, sustainable future—led us to launch DocuSign for Forests in 2019.

This initiative includes support for nonprofit organizations protecting the world's forests and the inclusion of an environmental impact calculator in our core eSignature product so our customers can see the environmental benefits of using the product.

We can be an integral part of your institution's effort by significantly reducing your carbon footprint and taking the paper out of paperwork—helping ensure our forests and our planet have a future.

DocuSign



95%
of eSignature agreements happen through integrations

> **"DocuSign's integration with Salesforce was huge in ensuring a one-stop-shop for users. Salesforce can obtain electronic signatures without users ever leaving the platform."**
>
> University of Colorado Boulder

Integrate with the systems you're already using

Every higher educational institution already has front-office and back-office systems in play. They're the motors that keep a college or university running.

You can easily embed DocuSign into your existing tools with 400+ pre-built integrations, like Salesforce, Hyland, Workday, Google and Campus Management. Or use our award-winning APIs to incorporate eSignature into your own custom apps. No more flipping between applications, or clicking back and forth between tabs. Take advantage of eSignature's power without your people ever having to leave the apps where they naturally work.

Of the institutions we surveyed, Human Resource Management (HRM), Content Management (CM), Customer Relationship Management (CRM) systems, and Enterprise Resource Planning (ERP) were the most popular platforms to integrate with eSignature.

HRM platforms include:
WorkDay
Workday Student
Oracle Peoplesoft via Lingk

CM platforms include:
Inteum
Wellspring

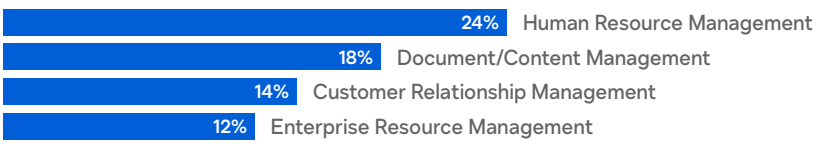
CRM platforms include:
Salesforce
UC Innovation

ERP platforms include:
Anthology
Ellucian Banner
Ellucian Colleague

Advancement platforms:
Affinaquest
Jenzabar

Property rental platform:
StarRez

Popular systems eSignature integrates with

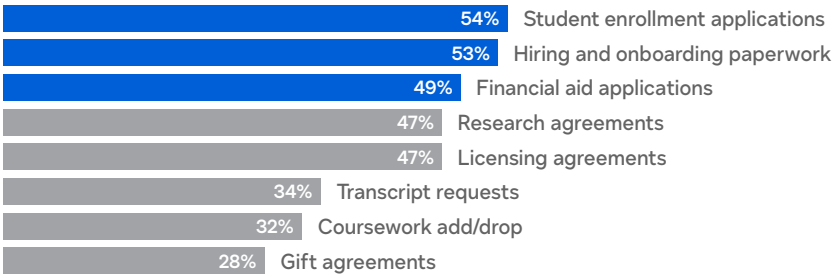


ROI by the numbers

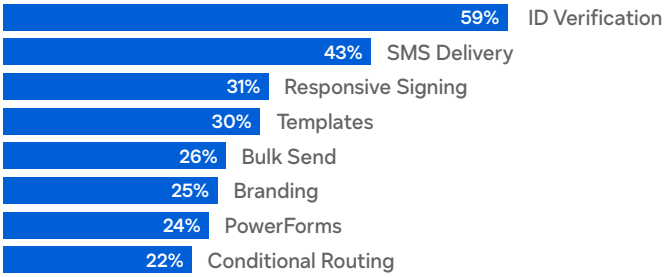
Of the professionals we surveyed, on average, 75 percent experienced an increase in employee satisfaction after expanding eSignature and Agreement Cloud use in their individual departments. Sixty-two percent saw a boost in employee activity.

Sixty-five percent saw an increase in student satisfaction, and every higher education department expanded eSignature use through an average of five Agreement Cloud features.

Top higher education use cases

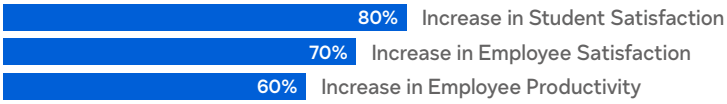


Most-used DocuSign Agreement Cloud features

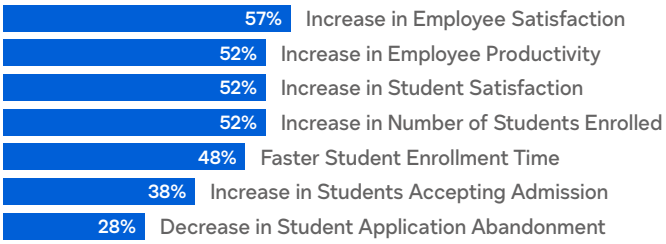


Results by academic department

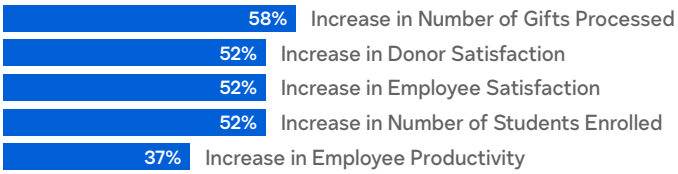
Academics & Registrar



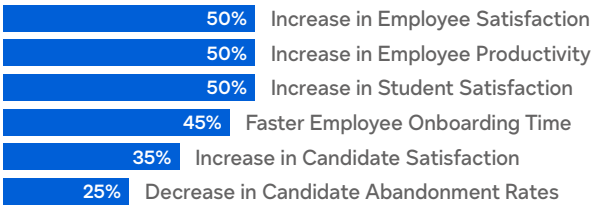
Admissions & Financial Aid



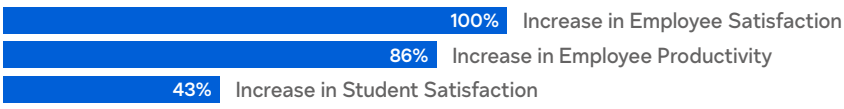
Advancement & Alumni Relations



Human Resources



Finance, Legal, Marketing, Operations, Student Services



Expand and transform with eSignature and the DocuSign Agreement Cloud

By now you know that DocuSign is much more than just eSignature. We're your strategic partner that can serve as a catalyst for your school's front-end digital transformation.

- Unlike other technology providers, DocuSign is completely focused on eSignature, Agreement Cloud and your full agreement lifecycle. It's all we do.
- Our technology architecture has enabled us to deliver over 99.99 percent platform availability for eSignature with no maintenance downtime.
- DocuSign currently has campus-wide deployments with 150+ institutions. We have successfully helped schools adopt and expand our technology many times before.
- If you don't have the IT capacity, we're glad to serve as an extension of your IT department. Our Professional Services Team can implement eSignature and Agreement Cloud applications for you, as well as integrate eSignature with your existing HRM, CM, CRM, ERP and other systems. The team can also help ensure your technology complies with VPAT accessibility mandates, accommodating visually impaired and differently abled students and staff.

Learn more about how the DocuSign Agreement Cloud for Higher Education can help make every department within your institution a more efficient, modern experience. Focus on supporting students instead of processing paper. Contact our sales department here.

Notes

* EAB Website: What 126 Presidents Learned from Slack About the Future of Work
** Educause: Understanding IT GRC in Education

About DocuSign
DocuSign helps organizations connect and automate how they prepare, sign, act on and manage agreements. As part of the DocuSign Agreement Cloud, DocuSign offers eSignature, the world's #1 way to sign electronically on practically any device, from almost anywhere, at any time. Today, over a million customers and more than a billion users in over 180 countries use the DocuSign Agreement Cloud to accelerate the process of doing business and simplify people's lives.

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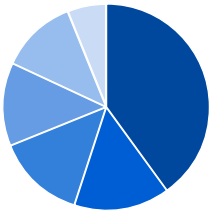
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DocuSign

Methodology

To collect data for this paper, DocuSign conducted a survey of 159 higher education decision makers in the winter and spring of 2022. The survey contained a series of questions related to respondents' current e-signature usage, the signature and agreement cloud processes at their institutions and their predictions for future expansion. Further, the survey explored operational and ROI benefits by comparing key metrics before and after adoption and expansion of eSignature. Survey participants are current DocuSign customers in the USA.

Key departments



- 40% Academics and Registrar
- 15% Admissions and Financial Aid
- 14% Information Technology
- 13% Human Resources
- 12% Advancement and Alumni
- 6% Finance, Legal, Marketing, Operations, Student Services

Survey flow

1/ eSignature usage
2/ Agreement Cloud usage
3/ Operational improvements
4/ Institutional ROI

Sample profile

Participants recruited through market research consultancy Paradox's channels, based on the following criteria:

- Work in USA
- From traditional universities, colleges and community colleges
- Professorial, executive, operations, or IT decision-makers
- DocuSign eSignature customers
- Capable of assessing pre-/post-DocuSign business impact metrics

Sample size

159
total participants

Roles

63 Academics & Registrar
21 Admissions & Financial Aid
19 Advancement & Alumni Relations
20 HR
22 IT
14 Other (Finance, Legal, Marketing, Operations, Student Services)

DocuSign®