

## **eSignature Quick Start Guide - OneSpan Sign**

The State of Ohio executed an enterprise agreement, through the competitive bidding process, that allows state agencies to set up accounts to manage electronic signature (eSignature) needs using OneSpan Sign, a leading electronic signature solution.

### **What is OneSpan Sign?**

[OneSpan Sign](#) (formerly eSignLive) is an electronic signature product. The solution provides a secure electronic signature technology for the signing of documents and the creation of document signature workflows. The product is also a FedRAMP authorized SaaS (Software as a Service) solution. [FedRAMP](#) authorization provides a standardized approach to cloud security.

With OneSpan Sign, users can streamline the process of getting documents signed and routing documents through a review/approval cycle. In addition to signatures, OneSpan Sign also enables signers to add their initials, full name, email address, date signed, etc. based on the organization's specific needs.

### **Are eSignatures Legal?**

Yes, eSignatures are legal. They are validated by the signer and provide the same legal binding as a handwritten signature. The U.S. Congress recognized the use of eSignatures with the [Electronic Signatures in Global and National Commerce Act \(ESIGN\)](#). The State of Ohio enacted the [Uniform Electronic Transaction Act \(UETA\) - ORC 1306](#). Many government organizations are increasingly turning to electronic signatures to increase efficiencies when doing business with citizens and business partners.

### **When to use OneSpan Sign?**

OneSpan Sign is an ideal solution if there is a need to frequently capture signatures involving multiple documents and multiple signers/delegates. OneSpan Sign can easily automate this process.

Using OneSpan Sign will help speed up business processes and increase productivity in the organization. It will also help in the reduction of paper related costs due to printing, faxing, mailing etc. eSignatures also provide protection against forgery and non-repudiation.

OneSpan Sign has an extensive library of open application programming interfaces (APIs) and software development kits (SDKs) to implement/integrate eSignatures with applications and core systems to provide a seamless experience to users.

OneSpan Sign's pre-built, third-party connectors enable the user to easily drop eSignature capabilities into business software products such as Dynamics CRM, Salesforce, Microsoft SharePoint, etc.

### OneSpan Sign and IRS 1075 Compliance:

The very nature of the eSignature solution (having no visibility into what is inside the attachments/documents) makes it impossible for OneSpan Sign to identify the type of data being processed by the state. For that reason, the OneSpan Sign service does not meet the full compliance requirements of IRS 1075. The Office of Information Security & Privacy (OISP) advises agencies NOT to use the eSignature service when Federal Tax Information is being included in the transaction package.

### **How much does OneSpan Sign Cost?**

The State of Ohio's enterprise agreement with OneSpan Sign provides state entities with a discounted cost of **\$1.06** per "transaction." One transaction can include multiple documents, multiple signatures, and multiple signers in a workflow. There are no additional costs to use add-on features such as multifactor authentication within the transactions.

Please note that a OneSpan Sign account will only be "charged" when a transaction is created and a signature workflow is started.

For state entities that are interested in integrating eSignatures with their existing applications or in developing new applications involving eSignatures, there is another cost involved if OneSpan Sign professional services are engaged in the effort. However, agencies can elect to build the integration capability needed using internal resources or staff augmentation without engaging OneSpan Sign professional services.

The Interval Deliverable Agreement (IDA) Cost is the cost associated with engaging OneSpan Sign professional services to integrate the eSignature solution with agency applications (e.g., API development). For stand-alone or straightforward implementations where there is no need for integration/development work, no IDA costs will be incurred.

### **How does one get started with OneSpan Sign?**

The following is a list of eSignature use case scenarios:

1. Out-of-the-box functionality (no integration/development)
  - This is the most common scenario to start automating the existing business processes requiring approvals/signatures involving multiple parties
  - If no integration is needed with existing applications, the agency can simply purchase the estimated number of eSignature transactions
2. Integration needed (no professional services)
  - There is a need to integrate eSignatures into an existing application or develop a brand-new application
  - An agency purchases the estimated number of transactions
  - The agency builds the integration capability needed using internal resources or staff augmentation with the available API/SDK resources

3. Integration needed (professional services)
  - o This scenario is the same as the one above, with the only difference being that OneSpan Sign is needed to manage the integration efforts
  - o An agency purchases the estimated number of transactions
  - o The agency executes an Interval Deliverable Agreement (IDA) for professional services with OneSpan Sign to build the integration capability

How to purchase eSignature transactions:

- a. Determine the number of transactions needed
- b. Contact the OneSpan Sign representative (see the contact information below) and copy [DAS.State.IT.Standards.Manager@das.ohio.gov](mailto:DAS.State.IT.Standards.Manager@das.ohio.gov) on the request
- c. Get a quote (Contract# MCSA0068) from OneSpan Sign for the number of transactions needed  
(Please note that there is no minimum purchase requirement. Purchased transactions will expire after 12 months from the purchase date. Each transaction will cost \$1.06.)
- d. Create a Release and Permit request and attach the quote
- e. The Department of Administrative Services (DAS) Office of Procurement Services will process the request
- f. Once the request is approved, create a purchase order
- g. Contact [DAS.State.IT.Standards.Manager@das.ohio.gov](mailto:DAS.State.IT.Standards.Manager@das.ohio.gov) with the purchase order to complete the agency account setup

How to engage OneSpan professional services:

- a. Contact the OneSpan Sign representative (see the contact information below)
- b. Work with OneSpan Sign to create an Interval Deliverable Agreement (IDA) using Contract# 0A1174
- c. Provide the IDA to DAS Procurement for review before being signed by OneSpan and an agency representative
- d. Once DAS reviews the IDA, OneSpan Sign, the agency and DAS will sign the IDA to make it part of the contract
- e. Create a Release and Permit request and attach the fully signed IDA
- f. DAS will process the Release and Permit request
- g. Once the request is approved, create a purchase order

**OneSpan Sign Contact Information:**

Patrick Stephens, Customer Success Manager

Tel: 312-766-5025

[Patrick.Stephens@onespan.com](mailto:Patrick.Stephens@onespan.com)

**State Procurement Contract Analyst :**

Dan Myers, Computer Acquisition Analyst

Tel: 614-995-0536 [Dan.Myers@das.ohio.gov](mailto:Dan.Myers@das.ohio.gov)

## **Examples of Agency OneSpan Sign Initiatives**

### **Pilot Project at the Ohio Bureau of Workers' Compensation:**

During the eSignature contracting process, the DAS Office of Information Technology (OIT) asked agencies for a pilot project to illustrate the functionality and possibilities for OneSpan Sign. The Bureau of Workers' Compensation (BWC) volunteered one of their most paper-oriented processes, the Handicap Reimbursement Application (HAW), led by BWC Director of Hearing Services Ben Crider.

BWC signed a contract for professional services with OneSpan Sign (priced at \$79,708) to implement the pilot in July, 2018 and successfully implemented the first OneSpan Sign eSignature pilot project in December of 2018.

The HAW process requires the eSignature workflow to accommodate multiple process steps, including: initiating a multiple-party signing event amongst both state and non-state entities; adding reference documentation from signer(s) throughout the process; allowing for the approval or dismissal of a HAW before the completion of the signing process; recording of a final hearing determination; and finalizing the entire HAW package. The pilot also included requirements for generating output files from the process that will be used to update other BWC systems in a future phase of the project. The BWC is planning to expand the eSignature capabilities to additional third-party entities in the HAW process.

### **DAS Service Contract Process:**

DAS enters into approximately 100 supplier contracts a year. This occurs when DAS selects a supplier through a competitive process and there is not an existing enterprise (statewide/central procurement) contract available for the goods or services being procured.

As part of the contract approval and signing process, DAS develops contracts; obtains supplier wet signature; and then routes the supplier signed contract internally through the agency for several levels of review and approval. DAS wants to convert the paper-based approvals in the contract process to eSignature approvals in the next few months, to speed up the processing time and to begin projects faster. As with most of the eSignature use cases, this process will not need any development/integration work and can be implemented with the out-of-box functionality available on the OneSpan Sign Solution.

### **Department of Transportation eSignature Projects:**

The Department of Transportation (DOT) has started to migrate their existing eSignature processes from a different vendor to OneSpan Sign over the next several months. DOT initiated the purchase process with OneSpan Sign for eSignature transactions (an estimated 70,000 transactions for the next 12 months). Most of the integration/development work will be done by DOT's internal IT resources.

## State of Ohio eSignature Resources

This document as well as other eSignature resources are available on the Statewide Enterprise Buys Web Page, <https://das.ohio.gov/technology-services/it-enterprise-services/statewide-enterprise-buys>

## OneSpan Sign Resources

### User Guides

- Getting Started as a OneSpan Sign Sender  
[https://docs.esignlive.com/content/b\\_application\\_user\\_s\\_guide/b\\_getting\\_started/getting\\_started.htm](https://docs.esignlive.com/content/b_application_user_s_guide/b_getting_started/getting_started.htm)
- Navigating the Dashboard  
[https://docs.esignlive.com/content/b\\_application\\_user\\_s\\_guide/b\\_getting\\_started/dashboard.htm](https://docs.esignlive.com/content/b_application_user_s_guide/b_getting_started/dashboard.htm)
- Creating Transactions  
[https://docs.esignlive.com/content/b\\_application\\_user\\_s\\_guide/d\\_transactions/transactions.htm](https://docs.esignlive.com/content/b_application_user_s_guide/d_transactions/transactions.htm)
- Managing Templates and Layouts  
[https://docs.esignlive.com/content/b\\_application\\_user\\_s\\_guide/g\\_templates\\_and\\_layouts/templates\\_and\\_layouts.htm](https://docs.esignlive.com/content/b_application_user_s_guide/g_templates_and_layouts/templates_and_layouts.htm)
- Advanced Features (Delegates, Bulk Send, Fast Track)  
[https://docs.esignlive.com/content/b\\_application\\_user\\_s\\_guide/h\\_advanced\\_features/advanced\\_features.htm](https://docs.esignlive.com/content/b_application_user_s_guide/h_advanced_features/advanced_features.htm)

### Video Tutorials

- Create and Save a Handwritten Signature  
<https://www.esignlive.com/resource-center/create-save-handwritten-signature-esignlive>
- Signing Transactions from the OneSpan Sign Dashboard  
<https://www.esignlive.com/resource-center/sign-transactions-dashboard-esignlive>
- How to Prepare a Document for Signing  
<https://www.esignlive.com/resource-center/send-sign-e-signature-transaction-esignlive>

- Using the Dashboard  
<https://www.esignlive.com/resource-center/use-dashboards-manage-e-signature-transactions>
- Creating and Using Templates  
<https://www.esignlive.com/resource-center/create-use-templates-esignlive>
- Using Bulk Send  
<https://www.esignlive.com/resource-center/send-document-using-bulk-send-esignlive>
- Using Authentication Options  
<https://www.esignlive.com/resource-center/authenticate-signers-esignlive>
- Using the Delegate Option  
<https://www.esignlive.com/resource-center/delegate-signing-authority-esignlive>
- Using Document Visibility  
<https://www.esignlive.com/resource-center/use-document-visibility-esignlive>
- Using Fast Track  
<https://www.esignlive.com/resource-center/automate-e-signature-workflows-using-fast-track-esignlive>

## Connectors

- How to Use the eSignLive Print Driver 2.1  
<https://www.esignlive.com/resource-center/use-esignlive-print-driver/>
- Creating a eSignLive Package in Salesforce  
<https://www.esignlive.com/resource-center/creating-an-e-signlive-package-in-salesforce/>
- How to Use E-Signatures in eSignLive for Microsoft Dynamics CRM  
<https://www.esignlive.com/resource-center/how-to-use-e-signatures-in-microsoft-dynamics-crm/>
- How to Use eSignLive for Microsoft SharePoint  
<https://www.esignlive.com/resource-center/how-to-use-e-signlive-for-microsoft-sharepoint/>