Case Study: State of Michigan

EXECUTIVE SUMMARY

Business Objectives

- Launch a legally defensible e-signing experience
- Enable all state departments to leverage e-signatures

The Challenge

- Increase workplace efficiencies
- Some groups began using unsecure methods of e-signing

The Solution

- Enterprise shared service involving OneSpan Sign in a FedRAMP hosted environment

The Results

- E-Signatures adopted by 15 of 17 departments
- 9,600 e-signed transactions in the first 9 months
- New business units running in less than a week
- E-Signed forms completed in half the time

The Great Lakes State deployed OneSpan Sign as a shared service to facilitate the launch of new e-signature workflows

The Michigan Department of Technology, Management, and Budget's (DTMB) Records Management Services spearheaded the launch of a statewide electronic signature platform as a centralized service to facilitate signing processes between state employees, businesses, and citizens.

The Records Management Services' interest in e-signatures was spurred by a desire to help gain efficiencies while ensuring the authenticity and integrity of the document creation process. By leveraging electronic signatures, they could automate their workflows and reduce the complexities and delays involved with managing activities, such as the updating of retention and disposal schedules and many other processes based on routing paper documents for physical signature.

After a thorough evaluation process, Michigan's DTMB opted to deploy OneSpan Sign's secure and legally enforceable e-signature solution as an interdepartmental shared service. This implementation model proved to have the greatest impact when COVID-19 caused new social distancing measures to take effect in Michigan and across the country.

The Challenge

There was not a consistent tool, methodology, or recommended practice for routing documents for signature. In some cases, teams began adding images of their own signatures onto documents — however, this method was not secure. Due to the lack of a comprehensive audit trail and the potential for documents to be changed during signing, audit trail evidence was scattered across multiple emails, and the initial signature images were not legally enforceable.

The printing and faxing of physical copies also introduced security risks, since many of the forms could potentially be left out in the open for anyone to pick up. With an end-to-end digital workflow, sensitive data could be kept safe from unwanted interception.

Each time documents are printed, signed, faxed, or scanned, the quality of the text and signatures is reduced which can cause difficulty reading the documents and signatures. For these reasons, Record Management Services set out to evaluate and select a secure and legally binding e-signature solution.

As business units move toward more electronic documents and signature collection, OneSpan helps ensure the documents remain unchanged during the signing process and that the authenticity of the signatures are verifiable.

Evaluation and Selection

As a first step, the project team created a list of over 125 anticipated requirements. They also invited their peers to review the list and add any missing needs. Some of the more important requirements included:

- A high level of document integrity
- Tamper-evident signed documents
- Audit trails
- Experienced solution provider
- Cloud-based solution hosted in a FedRAMP instance
- Excellent digital experience for signers and senders
- Solution with State of Michigan branding
- Emails sent through State servers
- High degree of automation with templates and layouts
- Group signing allowing one recipient to sign for a group
- Flexible workflows

- Administration of user roles to limit document visibility based on work unit and business need
- Single Sign-On (SSO) for senders
- Robust APIs for future integrations
- Reporting and analytics for insights into improvements
- Bulk sending of a transaction to a large number of signers
- Both click-to-sign and signature capture capabilities based on various department requirements

The selection process began with a Request for Proposal (RFP) after which a Joint Evaluation Committee (JEC) assessed various solutions based on meeting the outlined requirements, customer references, a smooth demonstration, and a solid training and support strategy.

OneSpan Sign was selected as the solution that could meet their needs while providing the best value from a licensing and training perspective.

The Rollout

The preferred approach of the Records Management Services was to launch OneSpan Sign as a statewide shared service that could be leveraged by all levels of the state's governmental departments. This allowed for a more flexible and scalable method of enabling e-signatures across multiple business units.

The State of Michigan partnered with Novinzio, a value-added reseller with extensive product knowledge and integration experience, to help bring the project to fruition.

Once deployed, the Records Management Services team issued newsletters and mass emails to all state divisions to promote the newly launched e-signature process. In addition, word of mouth played a large role in gaining further buy-in as employees shared their new e-signing experiences with their colleagues. This helped the solution gain prominence across Michigan's state agencies.

Almost all of their use cases could be categorized as B2E, B2B, or B2C and included:

- Invoice approvals
- Monthly procurement card approvals
- Contracts and change notices
- Retention and disposal schedule approvals
- Annual human resources forms
- Alternative work schedules
- School forms associated with COVID-19 grants

When a new business unit requested e-signature capabilities, Records Management Services presented an interactive demonstration, so those present could see both the sender's and signer's experience. Once their account was provisioned, local help desk coordinators then conducted trainings and served as the first line of support during ramp-up. Online tips sheets and recorded videos were also made available for people to consult as needed.

The Results

OneSpan Sign went live to production in March 2020 and by December, over 9,600 transactions were processed. In many cases, new business units could be up and running with e-signatures in less than a week. To date, over 1,000 users have been trained to use OneSpan Sign with roughly 90% of basic use cases taking less than 30 minutes of training.

Many of the business units benefited from reducing paper costs, supplies, and mailing fees. The accelerated signing process also increased productivity. For example, retention and disposal schedules are now completed and signed twice as fast taking the signing time down from 100 days to 50 on average, with some signed in 10 days.

Of equal importance, OneSpan Sign transactions are fully encrypted, and multi-factor authentication is available to provide an added layer of security. At the completion of an e-signing workflow, all of the documents and associated audit trails and evidence summaries can be automatically downloaded.

Finally, due to COVID-19 social distancing measures, the physical routing of documents for signature became difficult if not impossible in some instances. The adoption of OneSpan Sign created an effective and efficient method for delivering documents to co-workers and customers.

Conclusion

The launch of e-signatures across the State of Michigan largely coincided with the onset of the pandemic. Luckily, the state's Department of Technology, Management, and Budget was there to support each department in order to help maintain government services digitally during this time.

Looking forward, with many government agencies and their customers are getting more accustomed to online and remote interactions, e-signatures will certainly continue to proliferate across the state government. And with OneSpan Sign deployed as a shared service, the State of Michigan's DTMB has provided a foundation for further efficiencies to be gained by digital transformation.

OneSpan is trusted by the world's top financial institutions, insurance carriers as well as Federal and State/Local governments. With decades of experience in e-signatures, digital onboarding, and transaction security, OneSpan can be trusted to be an integral part of digital transformation while maintaining the highest-grade of audit trails and security. Learn more about OneSpan's government solutions **here**.

About OneSpan

OneSpan helps protect the world from digital fraud by establishing trust in people's identities, the devices they use and the transactions they execute. We make digital banking accessible, secure, easy and valuable. OneSpan's Trusted Identity platform and security solutions significantly reduce digital transaction fraud and enable regulatory compliance for more than half of the 100 largest global banks and thousands more banks around the world. Whether automating agreements, detecting fraud or securing financial transactions, OneSpan helps reduce costs and accelerate customer acquisition while improving the user experience. Learn more at **OneSpan.com**.

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