

E-SIGNATURE FOR CAMPUS-BASED STUDENT LOAN DOCUMENTS AT UC SAN DIEGO

FOCUS ON EFFICIENCY

The new E-Signature program at UC San Diego has significantly impacted campus-based loan document processing, and the system benefits both students and staff. In contrast to the previous time-consuming process, E-Signature has resulted in more accurate information provided by applicants, decreased processing time and more securely handles sensitive personal information.

UC San Diego's new E-Signature program allows for electronic signatures on loan documents and has streamlined the process for students and staff, changing the entire loan document-processing procedure.

Previously, loan documents were delivered via mail or in-person drop off, logged by the front end staff, then verified and processed for release by supervisors. Once finished, these documents were scanned to the online document repository system; the student information was manually entered for the corresponding documents and then sorted in numerical order and filed by social security number. Processing could be further slowed with inaccurate information, damaged or altered documents, and a significant seasonal (before the start of the academic year) increase in document volume.

With E-Signature, all touchpoints have changed. The student accesses the electronic document via his or her Financial Aid checklist, provides the required information, and once submitted, the document is uploaded to the online document storage system and the student's financial aid file, prompting the release of loan funds. With this new process, UCSD Student Financial Solutions employees do not need to invest time verifying and manually processing these documents, and the forms are readily available for viewing when needed.

Since all portions of the loan documentation are now completed online, it has significantly improved the accuracy of the information provided, ensures the documents are intact and legible, and document processing is nearly instantaneous.

Improvement in this process enhanced effectiveness and efficiency. To launch the E-Signature program, resources and expertise were aligned within a collaboration of Student Business Services, Information Technology Services, Financial Aid and Health Sciences.

MILESTONES

April 17, 2017
through
June 5, 2017

- Document fee, Salesforce and application programming interface is developed.

June 12, 2017
through
Sept. 8, 2017

- Quality assurance is conducted.

Sept. 11, 2017
through
Dec. 8, 2017

- User acceptance testing is conducted.

Jan. 18, 2018

- E-Signature is live.

QUANTIFICATION AND RESULTS

During the first three weeks of each quarter, hundreds of documents are delivered per day. Of these, 10 percent are improperly submitted for a variety of reasons and require follow-up. This impacts the main campus Financial Aid office, the Health Sciences Financial Aid office and Student Business Services (SBS). The manual process was cumbersome and an inefficient method of signing and delivering documents.

Barriers to overcome:

Adherence to laws, rules and regulations pertaining to electronic signature

Authentication

Verification

Data privacy and storage

Project funding

E-Signature tool integration with the Integrated Student Information System, Salesforce and DocuSign

With this system enhancement, the cycle time was improved: 95 to 97 percent of the documents are signed and automatically fed into the system. Due to the volume of paper forms received (in the fiscal year 2017-2018, SBS received more than 2,700 loan documents), the practice was to process paperwork in batches. It could take up to five days from receipt of the document by SBS to finish processing. With E-Signature, this eliminated the manual process of entering data into the system, scanning documents, validating correctness, filing and release for student loans. This application also cut down on employee hours spent going over paper forms and contacting students about errors on the forms.

IMPACT AND BENEFITS

SBS has become more efficient, and resources may be directed to other projects or tasks. Because all completed documents are cataloged and archived in iDocs (a document scan/storage system), this has facilitated document retrieval for audits.

Use of E-Signature creates a better customer experience for UCSD students. For example, it reduced the possibility of documents being lost in the mail.

Previously, students contacted SBS asking if their loan documents were received. With the new E-Signature process, updates occurred automatically; therefore, students do not need to contact the office.

Safe and secure handling of private information is now ensured.

There has been improvement in various compliance requirements.

PROJECT TEAM

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LESSONS LEARNED

1

More communication with stakeholders about the status of the project would have been beneficial.

2

There is a need to create and disseminate guidelines to front-line staff about how to manage an issue that may come up with the E-Signature process, especially guidelines on who to contact and how to resolve the problem.

REFERENCES

**UC San Diego DocuSign
eSignature website:**
[https://blink.ucsd.edu/
technology/esignature/index.
html](https://blink.ucsd.edu/technology/esignature/index.html)