

Adobe Sign

Agency Onboarding Process



Utah Department of
Technology Services

1. **INITIAL CONTACT** - Agency fills out the form
 - a. Agency Sign-up Form
 - i. Provide use case and as much information as you may have. This will help us expedite the onboarding process, and provide a more accurate solution to your electronic signature needs.
 - b. Agency Configuration Settings Form
 - i. Once you have completed the Agency Sign-up Form, we will work on creating the Group Admin accounts that you provided. We will then forward you a link to help us configure your group's Sign settings.
2. **FACT FINDING** - Kick-off Meeting (1.5 hours total)
 - a. 1 hr with Group Administrators, IT Directors, and business users to discuss use case.
 - b. Last 30 minutes of the meeting will be to go over group configuration settings that were completed prior to the meeting. We will also be doing a live demo of the group administrator access to help you manage your group and users within your group.
3. **USE CASE BUILD OUT & TESTING**
 - a. The DTS Adobe Sign team will work on creating your initial use case. Once done, we will forward you the link to start testing the workflow that has been created for your agency/process.
4. **ENABLEMENT TRAINING** - End-user workshop (1 hour)
 - a. DTS provides on-site or online training for your agency to those who would like to adopt electronic signature into their current business process. We will be going over how to send documents for signature and managing those documents once they've been set out.
5. **ADVANCED TRAINING** - Group admins and IT Directors (1 hour)
 - a. This will also serve as a handoff meeting to ensure that the group administrators are equipped to manage the users within their group, as well as manage and maintain the group's workflows.

Send. *Sign*. Done.