SAN FRANCISCO STATE UNIVERSITY

QUALITY ASSURANCE
OFFICE OF THE VICE PRESIDENT & CFO
ADMINISTRATION & FINANCE

1600 Holloway Avenue, ADM 354
San Francisco, CA 94132

Dear campus community,

Following the success of the electronic signatures program in DocuSign, Quality Assurance continues to strive to meet the needs of the campus community and is making a significant expansion of the program. Quality Assurance has worked in close collaboration with Information Technology Services to bring these changes to fruition and would like to make you aware of the following:

- *What is changing?*
  - Level 1 and PII data may now be routed through DocuSign.
    - Both Confidential and Personally Identifiable Information (PII) can be used in DocuSign, including Social Security number, driver's license or state ID card information, and student information. Users who will be reviewing Level 1 and/or PII data must log in with Two-Factor Authentication.
    - Please note, the following still may not be routed through DocuSign:
      - PCI data – Credit card information may not be routed through DocuSign. This includes credit card numbers, expiration date, and CVV code.
      - HIPAA data – Medical records may not be routed through DocuSign.
  - For security purposes, DocuSign users will no longer receive copies of completed documents via email.
    - Users will still receive an email notifying them a transaction has been completed, however, they will need to log into their DocuSign account to access and download completed documents and any attachments.
  - *Risk Assessment:* Forms that your department owns that you wish to route through DocuSign will go through a modified risk assessment process as we transition to this new phase of the electronic signatures program. Please submit any forms you would like to process in DocuSign to qateam@sfsu.edu for review and tracking purposes.
    - Please note that Quality Assurance and the Information Security Officer recommend only including Level 1 information if required for a business need. We are striving to keep student and staff data secure and continuously improve our processes.

- *What is not changing?*
  - Departments are responsible for determining when and how to accept their forms through DocuSign. Campus customers should reach out to the department that owns a particular form to ascertain whether the department is accepting the form in DocuSign and whether a template is available.
  - Internal departmental memos and forms can still be routed without a risk assessment as long as there is no PCI or HIPAA data.
  - DocuSign is still not approved for use with external parties.

As always, we are here to assist you and your department. Please reach out to qateam@sfsu.edu with any questions or visit our DocuSign @ San Francisco State website.