



The following documentation is an electronically-submitted vendor response to an advertised solicitation from the *West Virginia Purchasing Bulletin* within the Vendor Self-Service portal at *wvOASIS.gov*. As part of the State of West Virginia's procurement process, and to maintain the transparency of the bid-opening process, this documentation submitted online is publicly posted by the West Virginia Purchasing Division at *WVPurchasing.gov* with any other vendor responses to this solicitation submitted to the Purchasing Division in hard copy format.

Header 1

General Information

Contact

Default Values

Discount

Document Information

Procurement Folder: 463624

Procurement Type: Central Master Agreement

Vendor ID: 000000195808

Legal Name: CARAHSOFT TECHNOLOGY CORP

Alias/DBA:

Total Bid: \$0.00

Response Date: 08/28/2018

Response Time: 15:47

SO Doc Code: CRFQ

SO Dept: 0803

SO Doc ID: DOT1900000008

Published Date: 8/16/18

Close Date: 8/29/18

Close Time: 13:30

Status: Closed

Solicitation Description: ADDENDUM 1 DIGITAL
SIGNATURE TRANSACTION



Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

State of West Virginia
 Solicitation Response

Proc Folder : 463624

Solicitation Description : ADDENDUM 1 DIGITAL SIGNATURE TRANSACTION MANAGEMENT

Proc Type : Central Master Agreement

| Date issued | Solicitation Closes | Solicitation Response | Version |
|-------------|------------------------|------------------------------|---------|
| | 2018-08-29 13:30:00 | SR 0803 ESR08281800000000955 | 1 |

| VENDOR |
|---|
| 000000195808 CARAHSOFT TECHNOLOGY CORP |

Solicitation Number: CRFQ 0803 DOT1900000008

Total Bid : \$0.00 Response Date: 2018-08-28 Response Time: 15:47:24

Comments:

FOR INFORMATION CONTACT THE BUYER
 Crystal Rink
 (304) 558-2402
 crystal.g.rink@wv.gov

| | | |
|-------------------|--------|------|
| Signature on File | FEIN # | DATE |
|-------------------|--------|------|

All offers subject to all terms and conditions contained in this solicitation

| Line | Comm Ln Desc | Qty | Unit Issue | Unit Price | Ln Total Or Contract Amount |
|------|---|---------|------------|-----------------|-----------------------------|
| 1 | DIGITAL SIG TRANSACTION MGT & E-SIG SOFTWARE | 0.00000 | EA | \$75,122.000000 | \$0.00 |

| Comm Code | Manufacturer | Specification | Model # |
|-----------|--------------|---------------|---------|
| 81112217 | | | |

| | |
|-------------------------------|-------------------------------------|
| Extended Description : | SEE ATTACHED EXHIBIT A PRICING PAGE |
|-------------------------------|-------------------------------------|



Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

State of West Virginia
 Request for Quotation
 21 – Info Technology

Proc Folder: 463624

Doc Description: DIGITAL SIGNATURE TRANSACTION MANAGEMENT

Proc Type: Central Master Agreement

| Date Issued | Solicitation Closes | Solicitation No | Version |
|-------------|------------------------|-------------------------|---------|
| 2018-08-01 | 2018-08-29 13:30:00 | CRFQ 0803 DOT1900000008 | 1 |

BID RECEIVING LOCATION

BID CLERK
 DEPARTMENT OF ADMINISTRATION
 PURCHASING DIVISION
 2019 WASHINGTON ST E
 CHARLESTON WV 25305
 US

VENDOR

Vendor Name, Address and Telephone Number:

CARASOFT TECHNOLOGY CORPORATION
 1860 MICHAEL FARADAY DRIVE, SUITE 100
 RESTON, VA 20190

 703.871.8500

FOR INFORMATION CONTACT THE BUYER

Crystal Rink
 (304) 558-2402
 crystal.g.rink@wv.gov

Signature X

FEIN # 52-2189693

DATE 08/27/18

All offers subject to all terms and conditions contained in this solicitation

ADDITIONAL INFORMATION:

THE STATE OF WEST VIRGINIA PURCHASING DIVISION FOR THE AGENCY, WEST VIRGINIA DIVISION OF HIGHWAYS, IS SOLICITING BIDS TO ESTABLISH AN OPEN-END CONTRACT FOR DIGITAL TRANSACTION MANAGEMENT, DIGITAL SIGNATURE AND eSIGNATURE TECHNOLOGY PER THE ATTACHED DOCUMENTS.

| INVOICE TO | SHIP TO |
|--|--|
| DIVISION OF HIGHWAYS INFORMATION SERVICE DIVISION 1900 KANAWHA BLVD E, BLDG 5 RM 920 CHARLESTON WV 25305-0430 US | DIVISION OF HIGHWAYS INFORMATION SERVICE DIVISION 1900 KANAWHA BLVD E, BLDG 5 RM 920 CHARLESTON WV 25305-0430 US |

| Line | Comm Ln Desc | Qty | Unit Issue | Unit Price | Total Price |
|------|--|---------|------------|------------|-------------|
| 1 | DIGITAL SIG TRANSACTION MGT & E-SIG SOFTWARE | 0.00000 | EA | \$75,122 | \$75,122 |

| Comm Code | Manufacturer | Specification | Model # |
|-----------|--------------|---------------|---------|
| 81112217 | | | |

Extended Description :

SEE ATTACHED EXHIBIT A PRICING PAGE

SCHEDULE OF EVENTS

| Line | Event | Event Date |
|------|----------------------------|------------|
| 1 | QUESTION DEADLINE 10AM EST | 2018-08-13 |

| | | | |
|----------------------|--------------------------------|--|------------------------------|
| DOT1900000008 | Document Phase Final | Document Description DIGITAL SIGNATURE TRANSACTION MANAGEMENT | Page 3 of 3 |
|----------------------|--------------------------------|--|------------------------------|

ADDITIONAL TERMS AND CONDITIONS

See attached document(s) for additional Terms and Conditions



Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

State of West Virginia
 Request for Quotation
 21 – Info Technology

Proc Folder: 463624

Doc Description: ADDENDUM 1 DIGITAL SIGNATURE TRANSACTION MANAGEMENT

Proc Type: Central Master Agreement

| Date Issued | Solicitation Closes | Solicitation No | Version |
|-------------|------------------------|-------------------------|---------|
| 2018-08-16 | 2018-08-29 13:30:00 | CRFQ 0803 DOT1900000008 | 2 |

BID RECEIVING LOCATION

BID CLERK
 DEPARTMENT OF ADMINISTRATION
 PURCHASING DIVISION
 2019 WASHINGTON ST E
 CHARLESTON WV 25305
 US


VENDOR

Vendor Name, Address and Telephone Number:
 Carahsoft Technology Corporation
 1860 Michael Faraday Drive, Suite 100
 Reston, VA 20190

 703.871.8500

FOR INFORMATION CONTACT THE BUYER

Crystal Rink
 (304) 558-2402
 crystal.g.rink@wv.gov

Signature X  FEIN # 52-2189693 DATE 08/27/18

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THE STATE OF WEST VIRGINIA PURCHASING DIVISION FOR THE AGENCY, WEST VIRGINIA DIVISION OF HIGHWAYS, IS SOLICITING BIDS TO ESTABLISH AN OPEN-END CONTRACT FOR DIGITAL TRANSACTION MANAGEMENT, DIGITAL SIGNATURE AND eSIGNATURE TECHNOLOGY PER THE ATTACHED DOCUMENTS.

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|----------------------|--------------------------------|---|------------------------------|

ADDITIONAL TERMS AND CONDITIONS

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CARASOFT'S RESPONSE TO

**West Virginia
Department of Transportation**



REQUEST FOR QUOTATION

Digital Signature Transaction Management

SOLICITATION NO. DOT1900000008

Wednesday
August 29, 2018

SOLUTION PROVIDED BY



CARASOFT TECHNOLOGY CORP.

1860 MICHAEL FARADAY DRIVE, SUITE 100

RESTON, VA 20190

August 01, 2018

West Virginia Department of Transportation
2019 Washington Street, East
Charleston, WV 25305

Re: *Carahsoft's Response to West Virginia Department of Transportation's Request for Quotation for Digital Signature Transaction Management, Solicitation: DOT1900000008*

Dear Crystal Rink,

Carahsoft Technology Corp. appreciates the opportunity to respond to West Virginia Department of Transportation's (DOT) Request for Quotation for Digital Signature Transaction Management. Carahsoft is proposing DocuSign which fully meets the DOT's requirements for Digital Transaction Management and eSignature Technologies. Our team has fully considered the Division of Highways' requirements outlined in the Request for Quotation, and has carefully put together a solution that will best meet your needs.

Since opening its doors in 2004, Carahsoft has successfully executed over 173 orders to West Virginia State Government entities. As a top-ranked partner for DocuSign, Carahsoft has delivered best value solutions to our public-sector clients for over 14 years, including the West Virginia Department of Commerce.

Please feel free to contact me directly at 703.581.6581/Jacob.Holler@carahsoft.com or Allison Mackin at 703.889.9819/Allison.Mackin@carahsoft.com with any questions or communications that will assist the DOT in the evaluation of our response. This proposal is valid for 90 days.

Thank you for your time and consideration.

Sincerely,

DocuSigned by:

424BA17B902C4E3...
Jacob Holler
Account Representative

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EXECUTIVE SUMMARY

Solution Overview

Carahsoft Technology Corporation understands that the DOT is seeking Digital Signature Transaction Management. As the Prime Contractor, Carahsoft has assembled a team for the initiative that includes our Solution Provider, DocuSign, as the best solution to meet DOT's requirements.

Prime Contractor: Carahsoft Technology Corp.

Carahsoft Technology Corp. is an IT solutions provider delivering best-of-breed hardware, software, and support solutions to federal, state and local government agencies since 2004. Carahsoft has built a reputation as a customer-centric real-time organization with unparalleled experience and depth in government sales, marketing, and contract program management. This experience has enabled Carahsoft to achieve the top spot in leading public-sector software license resellers.

VENDOR RELATIONSHIPS – Carahsoft has a unique business model focusing on providing superior sales and marketing execution, a track record of success, high integrity, and a focus on strategic vendor relationships, of which **DocuSign** is an important part.

PROVEN EXECUTION – Carahsoft has leveraged its vast contracting experience and extended it to quoting and order management. Carahsoft seamlessly generates quotes within 30 minutes or less and processed over 85,000 orders in 2017 that were each completed the same day received.

CONTRACT VEHICLES – Over the past 14 years Carahsoft has acquired and maintained a wide variety of purchasing contract vehicles for agencies at the state, local, and federal levels. Associated with all contracts are dedicated and experienced contract management resources. A list of available contracts can be found at www.carahsoft.com/contracts/index.php.

GROWTH & STABILITY – Carahsoft has continued to show impressive growth year after year, with annual revenue of \$3.4 million in our first year in 2004 to \$4.4 billion in 2017. In September of 2017, 10,705 orders were processed worth over \$1 billion. We are a stable, conservative, and profitable company and have received numerous accolades, as detailed on our awards page: <http://www.carahsoft.com/awards>.

Solution Provider: DocuSign



DocuSign is the market and thought leader in the eSignature and System of Agreement (SofA) space, per Forrester, Gartner and Ombud Open Research's signature analyst reports. As of today, DocuSign is trusted by more than 400,000 customers and hundreds of millions of users in 180+ countries. DocuSign is an acknowledged leader with a consistent majority market share in the eSignature category. DocuSign meets the needs of a wide range of government services. Over the years, DocuSign has proven success with government agencies and contractors. They have standardized on DocuSign for eSignatures and electronic documents across enterprises, automating processes such as renewals and contracts for purchasing, travel reimbursements, HR hiring processes and documentation, and much more.

DocuSign's customer list includes global firms and industry leaders such as Microsoft, HP, SAP, Apple, Google, as well as over 600 Federal, State, and Local agencies such as the Nevada Department of Transportation, South Carolina Department of Transportation, Internal Revenue Service (IRS), Department of Veteran's Affairs, State of Virginia, the State of California, and more. DocuSign's expertise in public sector is robust and secure.

Team DocuSign offers DOT the best-in-class solution to transform the way you do business. By integrating DocuSign into the DOT processes, your clients and their constituents will benefit from a customer experience with lower risk, thus providing significant benefit and value to the DOT.

Benefits of DocuSign's Solution

Trust and Security: DocuSign leads the industry with the highest breadth and depth of security certifications and auditor assurances, meeting the industry's highest security standards to protect your data and a platform while complying with all security requirements.

- DocuSign is independently **FedRAMP Moderate** authorized
- DocuSign offers **GovCloud and FedRAMP Cloud**
- DocuSign is certified to all optional and mandatory ISO27001 controls
- DocuSign is certified to the xDTM Standard, the leading security certification covering eSignature and System of Agreement platforms

DocuSign Delivers Customer Success: By choosing DocuSign, you're choosing the best partner to drive your success. As the industry leader in customer success, DocuSign has invested more in customer success than any other company. In fact, we have more employees dedicated to customer success (500+) alone than our competitors have working on any aspect of eSignature combined. *With 24/7 live global support and unique, high-value customer programs, DocuSign's unparalleled offering is the most mentioned reason customers select and stay with DocuSign (e.g. Customer Success Architects, DocuSign University, and the Rapid Adoption Program).*

DocuSign's Support model is a key differentiation in comparison to our competition. DocuSign assigns a world-class support team that consists of an Account Executive, Account Manager, Technical Customer Support Manager, Engineer, Executive Sponsor and Customer Success Architect, who addresses

customer adoption, integration, expansion and messaging throughout the lifetime usage of DocuSign. While others may claim that they provide similar services, DocuSign is unique in providing dedicated account management and value realization team. Additionally, DocuSign provides business customers multiple methods of support, including chat, phone, and email, which is not provided by our competitors.

Market Leadership: For over 15 years, DocuSign has delivered electronic signature and System of Agreement solutions. Currently, with over 400,000 customers worldwide and the leading market share, DocuSign is not only the leader but the industry standard for eSignature and SofA. As shown below, DocuSign's expertise in the government marketplace is broad and deep. In addition, DocuSign also partners with 13 State Department of Transportations and 10 Local/Regional Transportation Authorities across the U.S., including Nevada DOT, Washington DOT, and South Carolina DOT.

Public Sector is Embracing DocuSign

39 States and 600+ City, County, and Municipal Organizations



3.1 GENERAL REQUIREMENTS

Contract Items and Mandatory Requirements: Vendor shall provide Agency with the Contract Items listed below on an open-end and continuing basis. Contract Items shall meet or exceed the mandatory requirements as shown below.

DocuSign will comply.

3.1.1 General

3.1.1.1 Shall provide a Digital Transaction Management (DTM) environment that enables DOT to digitally manage document-based transactions.

Yes, DocuSign's DTM solution has evolved to digitally manage document-based transaction throughout the whole System of Agreement (SofA) lifecycle. Agreements are everywhere. They are the foundation of doing business, yet most organizations' agreement processes—preparing, signing, enacting, and managing agreements—are manual and disconnected. In today's accelerated world, where people expect the speed and convenience of on-demand services, legacy Systems of Agreement cannot keep up. Instead, they are sources of needless costs, wasted time, unnecessary risk, and customer dissatisfaction.

Unlike narrower solutions, DocuSign's System of Agreement Platform connects our leading eSignature technology with every other aspect of the agreement process. It can be connected to other systems via hundreds of pre-built connectors or embedded into applications where employees already work. This comprehensive connectivity, together with DocuSign's highly secure, highly available and globally accepted platform provide the category-defining foundation for modern Systems of Agreement.

The DocuSign System of Agreement Platform enables organizations to accelerate and simplify agreements.



Prepare

Prepare agreements with a high degree of automation. This stage encompasses how an agreement gets to the state of being ready to send for signature.

- **Generate** agreement documents, including pre-filling an agreement with data from files or other systems, such as CRM and ERP.
- **Guide** a signer to fill in the proper information (including validation) and where to sign. For customers that need an interactive, wizard-like experience for collecting information from signers, Intelledox is our current partner of choice.
- **Collaborate** includes support for questions and comments during the process of circulating an agreement for signature. The difference between this aspect of collaboration versus collaboration that may have happened during the drafting of the agreement (likely in Microsoft Word or Google Docs) is that the DocuSign-based comments will be captured as part of the legal evidence associated with the agreement.



Sign

Sign agreements in a 100% digital, legally valid way. This stage encompasses who sends and signs, how those individuals are identified and how evidence is captured.

- **Route** an agreement to multiple parties for signature, with sequential, parallel, or hybrid signing order. This includes sending notifications and reminders to participants, as well as providing real-time visibility to the originator of each participants' signing status.
- **Identify** participants. This needs to provide multiple options to verify signers' identities, consistent with the legal requirements of different regions and agreement types. It can range from simple email verification up to eNotary-style in-person or, even, video verification. Although we natively provide many ID options, we also have several partners with additional ID capabilities, often for specific regions.
- **Certify** the signing process with DocuSign's court-admissible certificate of completion. It captures the details of who did what, when, and from where, during the process.



Act

Act on agreements after signature. This stage encompasses the processes that happen after the signature using the terms or other information in the document, in other words, the fulfillment of the agreement.

- **Trigger** actions in other systems, such as when Salesforce provisions a new instance of its software based on an agreement-completed event.
- **Update** other systems with data acquired as part of the agreement process, such as customer or order information.
- **Pay** (that is, allow the signer to pay) based on agreement terms. As part of the agreement process, the signer can pay with a credit card, electronic check, or mobile payment. This is an example of "Trigger," but we've called it out separately because we have a dedicated Payments feature.



Manage

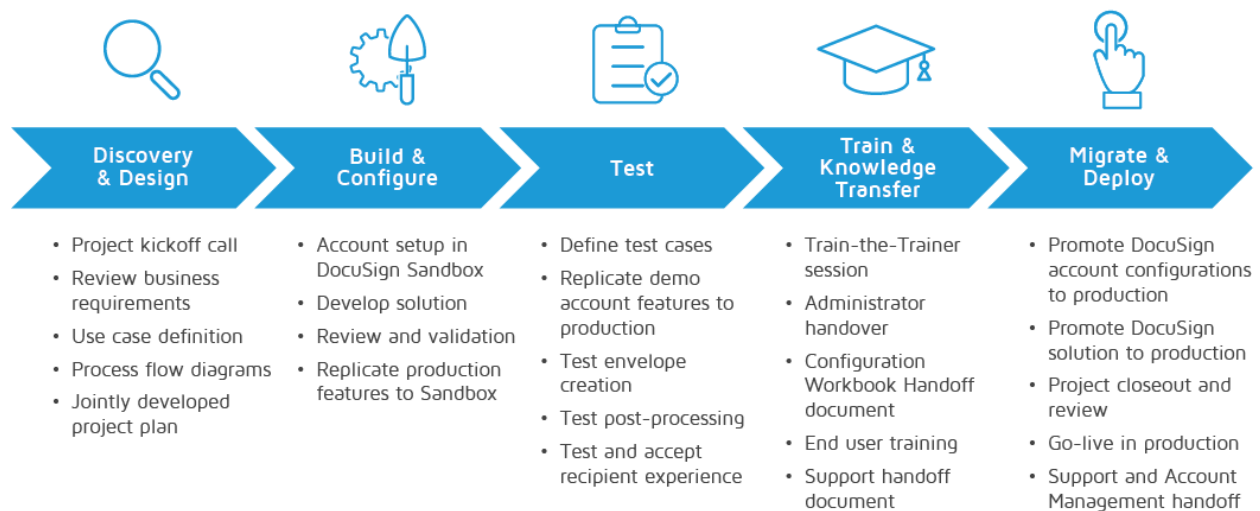
Manage completed agreements. This function encompasses what happens to the document itself after it has been completed.

- **Retain** the agreement and its court-admissible certificate of completion, cryptographically sealed and tamper-evident.
 - For customers that need a vaulting service for additional retention capabilities, eOriginal is our current partner of choice.
- **Retrieve** stored agreements by searching and filtering. DocuSign enables searching only on document metadata.
 - Customers that require searching on documents' content are advised to move copies to services like Box, which provide this capability.
 - For customers that require more advanced, AI-style search capability, such as theme-based searching, our partner of choice is Seal Software.
- **Reporting** on agreement statuses, completion rates, velocity, and other metrics to drive visibility into current and past activities.

3.1.1.2 Shall provide for implementation of Digital Signature, eSignature and Workflow technology that can be implemented as needed for the appropriate business processes.

Yes, DocuSign provides implementation services for our solutions. With hundreds of millions of users worldwide, we have the experience to help chart your course with a straightforward approach to deploying DocuSign. Together, the right blend of implementation services and best practices will help you extract maximum value from your solution and help set the stage for continued growth and expansion. Our implementation approach, reflected below, applies to both FastStart implementations and custom engagements for our Enterprise customers.

IMPLEMENTATION METHODOLOGY



3.1.1.3 Shall adhere to the West Virginia legal guidelines for digital signature and shall meet or exceed the requirements in the following mandates:

3.1.1.3.1 <http://www.wvlegislatre.gov/WVCODEiCode.cfm?chap=39a&art=3>

AND

3.1.1.3.2 <http://www.wvlegislatre.gov/WVCODE/ChapterEntire.cfm?chap=39a&art=1>

Yes, DocuSign sets the standard for world-class legal protection. With presence in 188 countries, you can trust DocuSign meets statutes and regulations around the world and leads the industry in compliance and enforceability. We provide the most authentication options, a comprehensive digital audit trail and carrier-grade security and operations.

DocuSign was the first company to warrant compliance with the U.S. E-SIGN Act, state laws modeled after 1999 UETA and certain key aspects of the UK Electronic Communication Act (2000). DocuSign is designed for global compliance with key components of the European Directive 1999/93 EC on a Community Framework for Electronic Signatures, including the UK Electronic Communication Act. DocuSign fully

enforces consumer consent, unique signature adoption and signature process flow provisions. DocuSign meets specialized rules from the FDA, FTC FHA, IRS, FINRA, among many others. We provide extensive, configurable authentication options to verify the identities of your signers.

DocuSign offers a court-admissible Certificate of Completion with a comprehensive digital audit trail to confirm the validity of your transactions.

DocuSign utilizes industry leading encryption standards, retention and storage practices and data security, so you can count on the integrity of the data to support the legality of your transactions.

DocuSign has over 200 million users in 188 countries. Additionally, please see the eSignature Legality Guide, which provides facts about current eSignature laws, local legal systems, and electronic signature technology preferences for countries around the world. <https://www.docusign.com/how-it-works/legality/global>

3.1.2 Forms

3.1.2.1 Form elements shall include:

3.1.2.1.1 The ability to make calculations that can be automated based on conditions

Yes, DocuSign provides the ability to do calculations via formula tags. DocuSign Formula tags provide the sender the ability to build a calculation using other tags in an envelope or template. The tags used in the formula are called "reference tags." The formulas built in a Formula tag can use the basic math operations of addition, subtraction, multiplication, division and rounding. The operators used in the formula are "+" (plus sign for addition), "-" (minus sign for subtraction), "*" (asterisk for multiplication), and "/" (forward slash for division). Conditional Logic is available for fields that allows the process to include/not include certain fields and data for calculations.

3.1.2.1.2 Signature and Optional Signatures

Yes, DocuSign provides a signature field. New users first confirm their signing name and initials and then select a signature style. When they adopt their signature, it is applied to the signing field. Otherwise, the signature is applied with a single click. Easy! The signing name is the name as you entered it when you added the recipient to your document. Signature fields can be placed in the document(s) as required or optional. You can also base the requirement of the signature on conditional logic from other fields/tags.

3.1.2.1.3 Initials and Optional Initials

Yes, DocuSign provides an initial field. Just like the Signature field, the initial field can be set to required or optional and the requirement can be based on conditional logic from other fields/tags.

3.1.2.1.4 Data Fields

DocuSign provides many different types of fields for the tagging of documents. The standard for data fields is the Text field. This is a free text field for data. By default, the text field accepts any characters. Enter a value in the Character Limit setting of the Add Text property to restrict the number of characters the recipient can enter. Set a Formatting property to hide text with asterisks and conceal the signer's data entry from anyone viewing the document. Use the Validation property to restrict the data entry in the field to a specific format, such as an email address or a social security number. Place the field on your document and select it. In the field properties pane, expand the Validation section, click the drop down, and select the validation format for the field.

3.1.2.1.5 Radio Buttons

Yes, DocuSign provides Radio Buttons. Radio buttons provide options from which recipients can select only one response. Radio buttons are placed in your document as a group, and you can add, remove, or position the individual buttons. The group is identifiable by the **Group Label** property, and by the dotted blue line that encompasses all buttons in the group. Radio buttons can be spread out over a document, so these markers can help identify which buttons belong together. On the completed PDF, only the selected option remains, appearing as an "x".

3.1.2.1.6 Drop-Down Lists

Yes, DocuSign provides drop-down lists. This field provides a drop-down list of options. Like radio buttons, recipients can select only one value from the drop-down list. When you place the field, the **Options** section opens on the properties panel. Create the options for your drop-down list by entering a semicolon-separated list of values in the field provided. This list is what your recipient sees when signing your document. The **Default Selection** list populates with your list of values, and you can select which value to show in the field by default. You can set additional properties in the properties panel, such as formatting and whether the field is required.

3.1.3 Mobility – Web, Mobile Applications and Integrations

3.1.3.1 Supported Mobile Operating Systems shall include:

DocuSign is specifically engineered and tested to work for signers on regardless of device type. It recognizes the device and may alter the HTML-5 rendered interface accordingly for the device being used to sign the document. We currently support signing on all HTML-5 capable browsers and mobile devices. Additionally, DocuSign is the only platform that offers native mobiles apps for all major platforms: iOS (iPad/iPhone) and Android. DocuSign is available through the Blackberry mobile browser but is not available through a native Blackberry mobile application.

Access your DocuSign account directly from your computer or your mobile device. Sign documents, send documents out for signature, gather signatures in-person, monitor document status, access completed

documents and much more. Whether you are in the office, at home, or on-the-go – DocuSign works every time from every device. Additionally, you can access from mobile browsers as well as from our native Apps.

- Support BYOD with native apps for all major platforms
- Quickly sign and send documents from the road—even without an internet connection
- Automate signature workflows into your company's mobile app with the DocuSign Mobile Client Library
- Meet the highest mobile device management standards
- Receive instant transaction updates
- Apps available for iOS and Android.



With DocuSign's mobile apps:

- Sign and send documents from anywhere
- Easily manage your documents, including void and remind
- Real-time status updates provide instant visibility

Offline Mobile capabilities –DocuSign is the only vendor to enable the following from a mobile device when the mobile device does not have internet access:

- In-person Signing
- Create Envelope
- Add Document
- Add In-person Signer
- Add Remote Signer
- Local Document Storage
- Enable Offline Mode

3.1.3.1.1 Apple iOS 7.0 and above

Yes, DocuSign provides a native app for iOS.

3.1.3.1.2 Android 4.0 and above

Yes, DocuSign provides a native app for Android.

3.1.3.1.3 Microsoft Windows 10 and above

Yes, DocuSign support Microsoft Windows 10.

3.1.3.2 Supported Internet browser environments shall include:

DocuSign supports the following browsers: Latest stable release (except where noted) of Internet Explorer® (11.0 or above); Windows Edge; Mozilla® Firefox®, Safari™; Google Chrome®.



3.1.3.2.1 Internet Explorer (Windows) 11 and above

Yes, DocuSign supports the latest stable release Internet Explorer 11 and above.

3.1.3.2.2 Google Chrome (Windows, iOS and Android) 63 and above

Yes, DocuSign supports the latest stable release of Google Chrome.

3.1.3.3 Signing application shall be available free and available for download

Yes, DocuSign's apps are free to download and are available for download.

3.1.3.4 Signing application shall include the following mobile functionality:

3.1.3.4.1 Create Documents

Yes, senders can create documents, templates, and use existing templates through the mobile app or using a mobile device. This functionality is also available offline.

3.1.3.4.2 Tag Documents

Yes, senders can tag documents through the mobile app or via a mobile device. This functionality is also available offline.

3.1.3.4.3 Send Documents

Yes, senders can send documents from the mobile app or via a mobile device.

3.1.3.4.4 Sign Documents

Yes, signers can sign documents via the mobile app or via a mobile device.

3.1.3.4.5 Shall enable the use of mobile digital signatures from a mobile device.

DocuSign recipients can sign on any device (mobile, tablet, laptop, desktop, etc.) that has connectivity. Recipients are not required to download apps for signing. However, DocuSign does have apps available that provide additional functionality such as the capability to send new documents, setup push notifications, and search and review signed copies. Our mobile capabilities are a strength compared to all our other competitors. For more information and to download the DocuSign app, please see the following sites:

- <https://play.google.com/store/apps/details?id=com.docusign.ink&hl=en>
- <https://itunes.apple.com/us/app/docusign-sign-send-documents/id474990205?mt=8>
- <https://www.docusign.com/partner/docusign-ink-ios>

3.1.3.5 Shall include the ability to work both online and offline.

Yes, DocuSign allows users to work online and offline. Below is the list of supported offline capabilities:

- In-person Signing
- Create Envelope
- Add Document
- Add In-person Signer
- Add Remote Signer
- Local Document Storage
- Enable Offline Mode

3.1.4 Deployment – Installation needs and available deployment options

3.1.4.1 Shall not require the local installation of Adobe Reader or Adobe Acrobat to complete signing.

DocuSign does not require the installation of Adobe Reader or Adobe Acrobat to complete signing. DocuSign is an on-demand SaaS (Software as a Service) platform. Aside from an HTML5 web browser, which is standard on most mainstream browsers, for signing and a PDF reader to optionally view documents which may be exported from DocuSign, there are no additional software requirements. No browser plug-ins, extensions, or add-ons are required. For the latest requirements: <https://support.docusign.com/guides/ndse-user-guide-system-requirements>

3.1.5 Signature

3.1.5.1 Shall offer digital signatures and support digital certificates from multiple certificate authorities in the cloud.

Yes, DocuSign is the only major vendor that can support this capability with Standards-Based Signatures.

Digital Signatures (X.509 standard certificate backed signatures) –DocuSign has the breadth and depth of digital signatures capabilities far beyond any other vendor. Other solutions have a high-friction solution for signers, and in many cases their solution is incapable of functional implementation. DocuSign has completed three acquisitions and spent two years in product development to bring a unique digital signature solution to market called Standards-Based Signatures. DocuSign’s Standards-Based Signatures can enable hundreds of digital signature use-cases that no other vendor’s solution can support. Specifically, DocuSign’s Standards-Based Signatures offer the following unique differentiators.

1. End-to-End cloud digital signatures – senders can select which type of certificate a signer must use to sign from the cloud, and a signer can sign using that certificate all within the cloud for a low-friction, completely seamless experience.
2. DocuSign doesn’t require desktop software for digital signatures (unless specifically required by certain 3rd party certificate authorities). DocuSign is the only solution that can complete an end-to-end digital signature transaction in the cloud without downloading a document to the desktop, installing desktop software, or installing special web plug-ins.
3. DocuSign can issue digital certificates as a certificate authority.

3.1.5.2 Shall have the ability to decline signing a document with explanation.

Yes, signers can decline to sign a document. Upon selecting decline, the signer is prompted to enter an explanation which is sent to the sender and stored in the audit trail.

3.1.5.3 Shall include the ability to accept disclosure language before completing the document.

Yes, Signers are presented with a Consumer Disclosure that is customizable using DOT’s legal language. Signers must accept disclosure to continue signing. If it is not accepted, the Signer can abandon the session or select to 'Decline to Sign' and will be presented with a text box to enter a reason. The Disclosure language accepted is audited and stored in the DocuSign 'Certificate of Completion' that accompanies every envelope transaction.

3.1.5.4 Shall have the ability to issue digital certificates for signers.

Yes. DocuSign is the only major vendor that can support this capability with Standards-Based Signatures.

Digital Signatures (X.509 standard certificate backed signatures) –DocuSign has the breadth and depth of digital signatures capabilities far beyond any other vendor. Other solutions have a high-friction solution for

signers, and in many cases their solution is incapable of functional implementation. DocuSign has completed three acquisitions and spent two years in product development to bring a unique digital signature solution to market called Standards-Based Signatures. DocuSign's Standards-Based Signatures can enable hundreds of digital signature use-cases that no other vendor's solution can support. Specifically, DocuSign's Standards-Based Signatures offer the following unique differentiators.

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3. DocuSign can issue digital certificates as a certificate authority.

3.1.5.5 Shall have the ability to sign using a digital certificate in the cloud without having to download the document to the local machine.

Yes. DocuSign is the only major vendor that can support this capability with Standards-Based Signatures.

Digital Signatures (X.509 standard certificate backed signatures) –DocuSign has the breadth and depth of digital signatures capabilities far beyond any other vendor. Other solutions have a high-friction solution for signers, and in many cases their solution is incapable of functional implementation. DocuSign has completed three acquisitions and spent two years in product development to bring a unique digital signature solution to market called Standards-Based Signatures. DocuSign's Standards-Based Signatures can enable hundreds of digital signature use-cases that no other vendor's solution can support. Specifically, DocuSign's Standards-Based Signatures offer the following unique differentiators.

1. End-to-End cloud digital signatures – senders can select which type of certificate a signer must use to sign from the cloud, and a signer can sign using that certificate all within the cloud for a low-friction, completely seamless experience.
2. DocuSign doesn't require desktop software for digital signatures (unless specifically required by certain 3rd party certificate authorities). DocuSign is the only solution that can complete an end-to-end digital signature transaction in the cloud without downloading a document to the desktop, installing desktop software, or installing special web plug-ins.
3. DocuSign can issue digital certificates as a certificate authority.

3.1.5.6 Shall have the ability to retain documents within the existing IT domain.

All aspects of each transaction are fully logged (including name, email address, IP address, date/time, and authentication) and captured in a detailed transaction history which is stored in perpetuity as hashed and encrypted data within the DocuSign system. The document(s) as well as this data is available on demand from the DocuSign system and may also be programmatically exported to client systems in real-time as

transactions progress to completed state. The history includes tracking each event that occurs across the life of the envelope include tracking who created the envelope, what level of authentication each signer went through, when each signer opens/views the forms, when it is signed, etc. In addition, DocuSign also generates a Certificate of Completion for every transaction in the form of a digitally signed PDF document which is designed to be a court admissible document.

3.1.5.7 Shall supply proof of signer identity, signer intent and document integrity.

Yes, DocuSign's audit trail contains proof of signer identity, signer intent, and document integrity.

3.1.5.8 Shall create legally compliant digital records that guarantee transparency, auditability and accountability based on signature validation for signers using PDF readers.

Yes, all aspects of each transaction are fully logged (including name, email address, IP address, date/time, authentication, and activity) and captured in a detailed transaction history which is stored in perpetuity as hashed and encrypted data within the DocuSign system. This data is available on demand from the DocuSign system and may also be programmatically exported to client systems in real-time as transactions progress to a completed state. In addition, DocuSign also generates a Certificate of Completion for every transaction in the form of a digitally signed PDF document which is designed to be a court admissible document.

Audit trails, such as signatures and documents, are always stored in encrypted form using an x.509 certificate. A hash is also taken before each change and compared to previous SHA-2 hash values to ensure the document has not been modified. After any change, a new hash is taken and stored physically and logically separate from the document.

DocuSign tracks activities at both a User and Transaction (Envelope) level. This is relevant both to an auditing perspective as well as driving the workflows around the document being signed. All the audit activities listed below are available to the Sending party through the user interface or programmatic API.

From the standpoint of a Signing User, DocuSign audits the following events:

Solicitation #: DOT190000008

- When a User was invited to sign, including whether the invitation was successfully delivered
- When a User passed (or failed) various authentication steps that were required to access the documents
- When a User agreed to a Consumer Disclosure consent
- When a User first viewed the documents
- When a User signed their documents
- Anytime a User downloaded the documents
- Anytime a User viewed the documents
- When a User declines to sign the documents
- Anytime a User marks-up a document or provides data values

Certificate of Completion

Envelope Number: 4420CE7F3A34892CF54291E37943207 Status: Completed
Subject: Agreement for Services
Code: expired
Source Envelope:
Document Pages: 1 Signatures: 1 Envelope Originator: Melanie Deschutes, CFM
Certificate Pages: 2 Initials: 0 123 Demar Blvd
AuthN: Enabled San Francisco, CA 95501
Envelope Stamping: Enabled melanie.deschutes@gmail.com
IP Address: 54.218.177.230

Record Tracking

Status: Original Holder: Melanie Deschutes, CFM Location: DocuSign
07-20-2014 | 11:07 PT melanie.deschutes@gmail.com

| Signer Events | Signature | Timestamp |
|---|-----------|---|
| Amy Demos amy.demos@docuSign.com | | Sent: 09-20-2014 11:09 PT Viewed: 09-20-2014 11:09 PT Signed: 09-20-2014 11:09 PT |
| Alpha One Security Level: Email, Account Authentication (None) Using IP Address: 174.46.233.200 | | |

Electronic Record and Signature Disclosure: Not Offered
ID:

| In Person Signer Events | Signature | Timestamp |
|-------------------------|-----------|-----------|
| | | |

| Editor Delivery Events | Status | Timestamp |
|------------------------|--------|-----------|
| | | |

| Agent Delivery Events | Status | Timestamp |
|-----------------------|--------|-----------|
| | | |

| Intermediary Delivery Events | Status | Timestamp |
|------------------------------|--------|-----------|
| | | |

| Certified Delivery Events | Status | Timestamp |
|---------------------------|--------|-----------|
| | | |

| Carbon Copy Events | Status | Timestamp |
|---|--------|-----------------------------|
| Dennis Ravett dennis.ravett@mathesis.com Chief Product Officer Ravett (Clearing) Security Level: Email, Account Authentication (None) Electronic Record and Signature Disclosure: Not Offered ID: | COPIED | Sent: 09-20-2014 11:09 PT |
| Mike Marsh mike.marsh@mathesis.com Melanie Deschutes Properties Security Level: Email, Account Authentication (None) Electronic Record and Signature Disclosure: Not Offered ID: | COPIED | Sent: 09-20-2014 11:09 PT |

From the standpoint of the Sender, DocuSign audits the following events:

- When the sender initiated the Envelope
- When the sender activated the Envelope for signature
- Anytime the sender modifies the Envelope contents or signature workflow
- Anytime the sender downloads the documents
- Anytime the sender views the documents
- When a sender voids the Envelope (revoke the ability to eSign)

From the standpoint of a Transaction: DocuSign audits the following events:

- When the Envelope was initiated
- When the Envelope was activated for signature
- When the Envelope was viewed by all parties
- When the Envelope was signed by all parties
- When the Envelope was completed
- When the Documents were deleted
- When the physical location of the electronic Envelope was transferred to another electronic vault

Additionally, audit logs include changes to Permission Sets. Changes captured include:

- New permission set
- Edited permission set
- Deleted permission set

3.1.5.9 Shall not require local installation to be used or needed to verify signed files.

DocuSign does not require local installation. DocuSign is an on-demand SaaS (Software as a Service) platform. Aside from an HTML5 web browser, which is standard on most mainstream browsers, for signing and a PDF reader to optionally view documents which may be exported from DocuSign, there are no additional software requirements. No browser plug-ins, extensions, or add-ons are required. For the latest requirements: <https://support.docusign.com/guides/ndse-user-guide-system-requirements>

3.1.5.10 Shall have the ability to include a graphical signature from a local file.

Yes, signers can upload an image of their signature.

3.1.6 Transactions and Templates

3.1.6.1 License shall be configured to allow a minimum of 100 transactions annually per user. Additional options for higher volumes can be specified in the cost page.

Yes, each user comes with the ability to send 100 transactions. The total number of transactions per Account is 100 times the number of licensed users. This number is pooled and shared by your licenses users.

3.1.6.1.1 Transaction volumes shall be shared among licenses and pooled at the account level for the effective life of the contract. For example: if DOT procures 3 licenses with 500 transactions each, then a total of 1,500 transactions are available. User A may utilize 250 and User B utilize 500, User C 750.

Yes, transaction volumes are pooled amongst your licensed users.

3.1.6.1.2 Each transaction shall be capable of including an unlimited number of documents. The DTM system itself shall not limit the size of the document.

Yes, each transaction, or envelope, can contain an unlimited number of documents; however, each document cannot exceed 25 MB.

3.1.6.1.3 Shall be able to send documents from the following cloud repositories: Box, Drop Box, One Drive, and Google Drive.

Yes, senders can send documents for signature from Box, Drop Box, One Drive, and Google Drive.

3.1.6.1.4 Shall have the ability to create reusable templates that save tags and field placement, workflow routing and other standard fields.

Yes, authorized users can create reusable templates. DocuSign's templating capabilities allow DOT to standardize and manage repeatable processes across your organization. This is typically done and managed by a business user – there is no coding or archaic naming conventions. It is accomplished via a simple, drag-and-drop user interface.

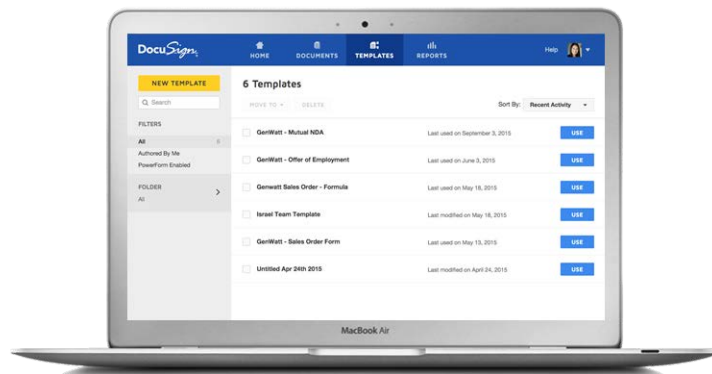
Templates help streamline the sending process when you frequently send the same or similar documents. Templates allow you to create a standard document, with set recipient roles, signing tags and information fields. Templates can also contain the signing instructions for the document and any signature attachments.

When there are some differences in the information needed for a document, a sender can still use a template to provide some recipient and tag information, while still allowing the sender to make additions and changes to the document before sending.

- Utilize predefined documents, data and workflow, and route to signers and other recipients
- Automatically apply tags and workflow based on previously sent documents with Intelligent Template Recognition (ITR)
- Distribute and restrict template access to individual, pre-defined groups or company-wide
- Easy to set up—no coding required
- Enable signer self-service with PowerForms

With DocuSign templates, DOT can:

- Quickly and easily send documents
- Avoid inaccurate data, incorrect workflow or incomplete documents
- Automatically enforce even the most complex approval workflows



DocuSign templates offer significant, differentiating capabilities when compared to other vendors “templates”. For example:

| | DocuSign | Competition | Notes |
|--|----------|-------------|---|
| Saved recipients (signers) | ✓ | ✗ | DocuSign templates save recipient’s names and email addresses; Other vendor templates do not |
| Saved routing workflow & roles | ✓ | ✗ | DocuSign templates save routing workflow, recipient roles, authentication, and messages |
| Mobile: use templates on phones/tablets | ✓ | ✗ | Use templates from DocuSign native mobile apps in iOS, Android, and Windows Phone |
| In-person signers for templates | ✓ | ✗ | Add in-person signers to templates; Other vendor templates don’t cover in-person use-cases |
| Update underlying documents | ✓ | ✗ | DocuSign templates allow you to add or replace underlying template documents |
| Edit saved template attributes | ✓ | ✗ | Edit the signer’s name, email, routing workflow, roles, authentication, and messages |
| Template sharing | ✓ | ✗ | Create templates and share them with other DocuSign users |
| Create and manage template folders | ✓ | ✗ | Manage templates by organizing across custom folders |
| Subject & message locking | ✓ | ✗ | Option to lock subject, message, and private messaging for future use |
| Recipient and/or field locking | ✓ | ✗ | Option to lock recipients and/or fields within the template for future use |
| Brand selection and locking | ✓ | ✗ | Select brand by template If you have multiple brands with option to lock chosen brand |
| Template matching settings with page-level granularity | ✓ | ✗ | DocuSign will check uploaded document with previously saved templates and let you automatically apply your existing template to your matched document |

Unlike other signature providers, DocuSign does not require the original document to be edited to include textual markers which designate locations for signature, dropdown, radio buttons, etc. DocuSign provides multiple methods to a pre-determined location:

1. Drag/Drop, with SAVE as an electronic form...without modifying the underlying document
2. Use of naturally occurring text. For example, “Sign Here:” might already be within the document (or “In Witness thereof”). A DocuSign signature or field may be specified to automatically occur in a position relative to the text (move down xxx and to the right xxx, whenever you find yyy)
3. Use a textual marker overtly included within the document. Other vendors provide this, but DocuSign additionally allows you to specify what the textual clue should be.
4. Allow the signer to decide

3.1.6.1.4.1 Templates shall save the name and email of all signers / approvers in the workflow.

Yes, template can save the name and email of signers/approvers in the workflow. If a signer in a workflow is unknown or changes, DOT can add a step in the workflow, but leave it blank to be completed by the sender.

3.1.7 Workflow

3.1.7.1 Shall be able to sequence workflow to signers in serial, parallel, and mixed (hybrid) routing throughout the user experience.

Yes, DocuSign allows you to put powerful workflow creation tools in the hands of your business users.

- Route documents to your recipients in any order (e.g. **serial, parallel, or mixed**)
- Assign recipient-specific tasks including signing, viewing or copy receipt
- Utilize predefined documents, data and workflow, and route to signers and other recipients
- Enable signer self-service and list-based sending with PowerForms and Bulk Sending

| Add Recipients | | | | | | |
|--|-------------|----------------------------|---|-----------------|---|---|
| As the sender, you will automatically receive a copy of the completed documents. | | | | | | |
| ADD FROM CONTACTS | | | | | | |
| <input checked="" type="checkbox"/> Set signing order | | | | | | |
| 1 | Placeholder | Sender | ✍ | Needs to Sign | 📧 | ✕ |
| 2 | Placeholder | Budget Owner | ✍ | Needs to Sign | 📧 | ✕ |
| 2 | Placeholder | Senior Manager Procurement | ✍ | Needs to Sign | 📧 | ✕ |
| 3 | Placeholder | Department VP | ✍ | Needs to Sign | 📧 | ✕ |
| 4 | Placeholder | Head of Procurement | ✍ | Needs to Sign | 📧 | ✕ |
| 5 | Placeholder | Accounting | 📧 | Receives a Copy | 📧 | ✕ |
| 5 | Placeholder | Senior Manger Procurement | 📧 | Receives a Copy | 📧 | ✕ |
| 6 | Placeholder | CFO | 👁 | Needs to View | 📧 | ✕ |
| ADD RECIPIENT | | | | | | |

With DocuSign's powerful signing workflows, DOT can:

- ✓ Ensure the proper person acts on your documents at the right time
- ✓ Standardize processes, reduce preparation time, and enable end-to-end automation of your business
- ✓ Create and manage time-sensitive transactions

3.1.7.2 Shall be able to format fields that allow recipients to make changes in documents during the signing process.

Yes, Signers can be "Allowed to Edit." Signers with this designation can make changes during the signing process.

3.1.7.3 Shall be able to make changes to workflow recipients after the transaction is initiated.

Yes, some recipients can be set up in the template to manage the envelope recipients. Recipients can have the option to ["Change Signer"](#) or delegate the signing responsibility to someone else, and the process is defined for each template. Additionally, it is possible for the sender to ["Correct"](#) the workflow, and dynamically change a recipient's name or email address. Finally, it is possible to dynamically assign recipients through brokers. See ["Agent Managed Envelopes"](#) for more information. Note, DocuSign Admins and Senders have the complete control to enable or disable any of these features.

3.1.7.4 Shall be able to send the same document(s) to a list of recipients simultaneously (parallel workflow).

Yes, DocuSign supports parallel workflow with an unlimited number of recipients.

3.1.7.5 Shall be able to send a package of documents through a workflow to multiple recipients and control which users can see which documents within the package.

Yes, this can be accomplished using the DocuSign "Document Visibility" feature.

There might be times when you need to send an envelope to several recipients, but you only want each recipient to see the documents they must sign, not all the documents in the envelope. This can be accomplished using the DocuSign Document Visibility feature.

Document Visibility controls document access by limiting who can view documents in an envelope. When Document Visibility is enabled, documents with DocuSign tags can only be viewed by signers that have a tag on that document. Recipients that have an administrative role (recipients with an Action of Manage envelopes, Address recipients, Manage recipients, Receive a copy or Acknowledge receipt) can always see all the documents in an envelope, unless they are excluded when an envelope is sent. Documents that do not have tags are always visible to all recipients, unless they are excluded when an envelope is sent. This is a fantastic feature that many of our customers leverage for a variety of document types, especially those with sensitive data where only certain groups should see certain documentation of the total completed packet.

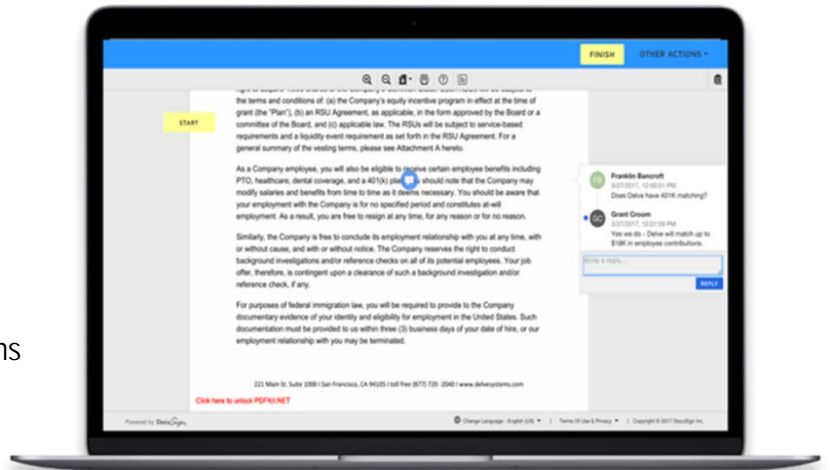
<https://support.docusign.com/en/guides/cdse-user-guide-advanced-sending-using-document-visibility>

3.1.7.6 Shall be able to allow signers and senders to comment to each other within the solution before the signing is complete.

Yes, DocuSign provides a comment feature. DocuSign's Comments feature allows Senders and Recipients in an envelope to add notes in the context of a document directly within the DocuSign web and mobile signing experience. The feature offers real-time comment notifications as well as ability to track and retain conversation history for DocuSign transactions.

Senders and recipients on an envelope will collaborate more effectively by exchanging comments/answers in the context of documents from directly within our web and mobile applications. With Comments, DOT can:

- Accelerate transactions with real-time comment notifications.
- Securely track and retain the history of conversations for their digital transactions as part of DocuSign envelopes



Benefits of DocuSign Comments:

- **Collaborate More Effectively:** Easily exchange document questions & answers directly within DocuSign web & mobile applications
- **Accelerate Transactions:** Streamline workflows and improve pace of business with real-time comment notifications
- **Securely Track Conversations:** Rest assured that comments are encrypted and retained as part of transaction history

3.1.7.7 Shall allow senders to make changes to the document or workflow after it has been sent out without having to cancel the transaction and start over.

Yes, some recipients can be set up in the template to manage the envelope recipients. Recipients can have the option to [“Change Signer”](#) or delegate the signing responsibility to someone else, and the process is defined for each template. Additionally, it is possible for the sender to [“Correct”](#) the workflow, and dynamically change a recipient's name or email address. Finally, it is possible to dynamically assign recipients through brokers. See [“Agent Managed Envelopes”](#) for more information. Note, DocuSign Admins and Senders have the complete control to enable or disable any of these features.

Signers can be “Allowed to Edit.” Signers with this designation can make changes during the signing process.

3.1.7.8 Shall include the ability to create automated notifications and reminders that are customizable.

Yes, DocuSign users can configure which events will trigger a notification. When using the DocuSign web application, it is possible to set reminders and an expiration on both individual documents and templates using a number of days relative to the start of the individual envelope. The DocuSign API can also be used to manage when reminders are sent and envelopes are expired. Reminders can be set in a template and when envelopes are sent. The sender needs to choose how many days after sending the envelope the first reminder will be sent. This first reminder serves as the starting point for all later reminders. Next, the sender

chooses how frequently reminders will be sent following the first reminder. Reminders will only be sent to recipients that have not completed their signing ceremony.

3.1.7.9 Shall have a method to handle multiple signers that are using digital certificates.

DocuSign allows for signer-held certificates to be used for one or more recipients in the workflow. In addition, DocuSign can also use DocuSign Express, OpenTrust, and DocuSign Signature Appliance digital certificates.

3.1.7.10 Sender shall have the ability to determine which type of digital certificate the signer is required to sign with.

DocuSign is the only major vendor that can support this capability with Standards-Based Signatures.

DocuSign has the breadth and depth of digital signatures capabilities far beyond any other vendor. Other solutions have a high-friction solution for signers, and in many cases their solution is incapable of functional implementation. DocuSign has completed three acquisitions and spent two years in product development to bring a unique digital signature solution to market called Standards-Based Signatures. DocuSign's Standards-Based Signatures can enable hundreds of digital signature use-cases that no other vendor's solution can support. Specifically, DocuSign's Standards-Based Signatures offer the following unique differentiators.

1. End-to-End cloud digital signatures – senders can select which type of certificate a signer must use to sign from the cloud, and a signer can sign using that certificate all within the cloud for a low-friction, completely seamless experience.
2. DocuSign doesn't require desktop software for digital signatures (unless specifically required by certain 3rd party certificate authorities). DocuSign is the first solution that can complete an end-to-end digital signature transaction in the cloud without downloading a document to the desktop, installing desktop software, or installing special web plug-ins.
3. DocuSign can issue digital certificates as a certificate authority.

3.1.8 Authentication

3.1.8.1 Shall have an authentication method available to confirm signer identity.

Yes, DocuSign provides multiple authentication methods. In addition to standard email address authentication, DocuSign offers an industry-leading choice of authentication services for customers, partners, and developers. By default, authentication is at the point of signing, making it a seamless process that keeps business digital.

- **Email Address.** Requires access to a specific email address before access is granted.
- **Access Code.** Requires the signer to provide a sender-generated code shared out of band, usually over the phone. The signer must enter the code to open the document.

- **SMS.** A two-factor solution that requires the signer to provide a randomly-generated one-time passcode sent via SMS text message to the signer's mobile phone to open the document.
- **Federated Identity/Single Sign-On.** Federated Identity validates authentication by an external system integrated with DocuSign via the industry-standard protocol SAML.
- **Third-party.** Validates the signer's Salesforce, Google, Yahoo!, or Microsoft account credentials, with additional options for social network credentials from Facebook, Twitter, and LinkedIn.
- **DocuSign Credentials.** Validates a recipient's existing DocuSign account associated with a username and password.
- **ID Check.** This third-party service by LexisNexis validates a signer using a KBA (knowledge-based authentication) process. The signer must correctly answer a list of personally identifying questions to open the document (OFAC Checking and Age Verification can be part of this).
- **Two-Factor Phone Authentication.** This third-party service by Authentify validates a signer's access to a phone number and predetermined access code for entry. The signer's spoken name is also recorded as a biometric print.
 - ✓ Increased legal enforceability
 - ✓ Ensures the highest level of data privacy
 - ✓ Meets authentication regulations and best practices (e.g. FFIEC and CSA recommendations)
 - ✓ Supports access control requirements for security certifications including ISO 27001
- **Digital Certificates - DocuSign** offers digital certificates as part of its Standards-Based Signatures platform. Using digital certificates during signing provides higher levels of identity authentication and document transaction security. Further explanation of DocuSign's Standards Based Signatures can be found here: <https://www.docusign.com/sites/default/files/standards-based-digital-signatures.pdf>

Please note that when users are preparing an envelope, and include a contact with an existing phone number, that phone number is automatically selected when the users select SMS, Two-Factor Phone, or Fax authentication. If there is more than one existing phone number, the user can select the number from a list that appears in a dialog box.

DocuSign's OAuth supports the standard grant types for web and smart applications. This allows third-party integrations to authenticate a user without prompting the user for their password. In addition, this model of authentication allows DocuSign to introduce new authentication features without having to update any third-party integrations.

DocuSign SSO currently supports the following SAML protocols, OASIS SAML 2.x or 1.x with HTTP POST binding or earlier.

3.1.8.2 Methods of user account authentication shall include:

3.1.8.2.1 Phone

Yes, DocuSign supports authentication via phone using an access code that is delivered via phone or two-factor phone authentication. This third-party service by Authentify validates a signer's access to a phone

number and predetermined access code for entry. The signer's spoken name is also recorded as a biometric print.

3.1.8.2.2 SMS

Yes, DocuSign supports authentication via SMS. This requires the signer to provide a randomly-generated one-time passcode sent via SMS text message to the signer's mobile phone to open the document.

3.1.8.2.3 Knowledge Based Authentication (KBA)

Yes, DocuSign provides authentication via KBA. This third-party service by LexisNexis validates a signer using a KBA (knowledge-based authentication) process. The signer must correctly answer a list of personally identifying questions to open the document (OFAC Checking and Age Verification can be part of this).

3.1.8.3 Shall include single-sign on (SSO) capabilities.

Yes, DocuSign support SSO. With DocuSign's Single Sign-On (SSO) capabilities, DOT can use your own system to manage and authenticate users into DocuSign. This enables centralized provisioning for all corporate applications. And it allows organizations to implement their own security policies around identity and user management. For DOT's users, they can have one email and password to access everything at work, including their computer, email, and DocuSign.

DocuSign's OAuth supports the standard grant types for web and mobile applications. This allows third-party integrations to authenticate a user without prompting the user for their password. In addition, this model of authentication allows DocuSign to introduce new authentication features without having to update any third-party integrations.

Users

There are two general methods used to set up SSO to allow users to access DocuSign.

- A user goes to the DocuSign console and enters their email address. DocuSign recognizes the email domain for the user and directs them to their Identity Provider application where they enter their network credentials to log on to their DocuSign account.
- A user is already logged on to their primary network. The network has a link to the DocuSign console and users are automatically logged in to the DocuSign console when they access the console through the link.

System Administrators

When SSO is enabled, system administrators can use their current authentication systems to manage user access to the DocuSign service, removing the need for users to manage their own DocuSign account logins. DocuSign also supports mixed access to both DocuSign password and SSO access.

System administrators still need to add, remove and modify users and user Permissions through the DocuSign console or DocuSign Account Management API.

Supported Protocols

DocuSign SSO currently supports the following SAML protocols:

- OASIS SAML 2.0
- WS-Federation SAML 1.1

DocuSign is the only vendor to offer the following SSO capabilities:

- SAML 2.0
- Federation bypass and exception per user
- Web support for SSO with federation (Classic, New DocuSign Experience, Admin, etc.)
- Mobile support for SSO with federation (iOS, Android)
- Self-serve configuration via DocuSign Admin.
- Just-in-time user provisioning.
- Complete SSO domain lockdowns (i.e. prevent reset password, change email within DocuSign.)
- Respecting email changes from Identity Provider in SAML.
- Improved SAML support (attribute mapping, multi-tenant IDP, etc.)

For additional information on our SSO, please see <https://support.docusign.com/en/guides/ndse-admin-guide-single-sign-on-overview>

3.1.9 Retention

3.1.9.1 Shall have a document security option that allows the administrator to set the number of days that completed, declined, and voided documents are retrained.

Yes, the document retention policy is configurable by the client. Most clients leave signed documents in the DocuSign system indefinitely to retain an independent third party that can warrant the documents have been securely stored and have not been altered. It is also common for clients to utilize the DocuSign Connect publisher service to deposit copies of signed documents in their integral document repositories and applications so that a local copy is kept behind their firewall and readily accessible. However, DocuSign supports the unique retention policies of each of its clients by enabling them to remove documents from the system as well. This can be performed on a policy-basis according to a pre-defined schedule (ex: 14 days after completion); or it can be performed on explicit basis upon instructions from a client system. In either of these cases, DocuSign will remove the documents from the system, though it will maintain the audit log so that it can vouch for the execution history of the documents.

3.1.9.2 Documents and Audit trail information shall by default have an indefinite retention period.

Yes, documents and audit trail information can be stored in DocuSign indefinitely.

3.1.10 Platform

3.1.10.1 Average system availability shall be more than 99.5%.

Yes, DocuSign maintains a system availability significantly higher than 99.5%. With near real-time, secure data replication and uptime of more than 99.99%, customers can count on the availability of DocuSign's service to conduct their business. DocuSign is the only vendor that owns its co-located platform infrastructure. DocuSign's Carrier-grade Architecture provides ongoing resilient system performance, even during peak traffic or disaster scenarios, while also eliminating planned downtime for maintenance. Each DocuSign instance in this architecture is comprised of multiple simultaneously active DocuSign systems in different geographic locations, each supporting customer transactions while staying synchronized with each other. In-process and completed transaction data are saved in multiple locations, providing high availability and a superior level of protection against data loss and corruption.

Below is DocuSign's uptime since 2013:

- 2013 - 99.97% (does not include scheduled downtime)
- 2014 - 99.95% (last scheduled downtime was April 2014)
- 2015 - 99.9942%
- 2016 - 99.9954%
- 2017 - 99.996%
- 2018 - <https://status.docusign.com/>

3.1.10.2 Shall have redundant and geo-dispersed data centers.

Yes, DocuSign uses 3 geographically dispersed data centers to host the service within the U.S. and 3 geographically dispersed data centers in the Euro zone. Any one of the data centers can run the entire DocuSign service on its own without any performance or functional degradation. When maintenance needs to be performed, any one of the 3 data centers can be taken offline without any discernible effect on the DocuSign service resulting in zero service downtime. The service is always up and running 24x7, 365 days a year.

3.1.10.3 DOT shall be able to choose where their data and transactions are located and stored.

Yes, DOT can choose which datacenter ring the data and transactions are located and stored. Typically, our US based customers use the US datacenter ring, which contains professional, commercial-grade Tier III data center facilities. There are currently three datacenters geo dispersed throughout the US. These data centers are in Seattle, Chicago and Texas.

3.1.10.4 Vendor shall maintain a written business continuity and disaster recovery plan that addresses the availability of the DTM system.

Yes, DocuSign performs Business Continuity testing on an annual basis that DocuSign determines is appropriate for their environment. This testing involves the following:

- Failover of selected DocuSign systems.
- Information Security Tabletop exercises
- Companywide communication testing
- Pandemic Testing
- DERT:
 - Emergency response team exercises completed throughout the year
- First Aid/CPR,
- Physical safety and security
- Emergency response team drills fire drills,
- Companywide personal safety and awareness training.

With DocuSign's carrier-grade architecture, secure replication is performed in near real-time to our geo-diverse active systems. DocuSign designs all deployments to be fully redundant and fault tolerant. There are no single points of failure in our load balanced, redundant configuration. Our environment uses load balancers to spread load throughout multiple servers. If a server fails or experiences an issue it should be transparent to users using our system. In addition to SQL clustering and server load-balancing we also have redundant networking gear that replicates customer documents up to 9 times across the systems that can recover in the event of a failure of any. All data is replicated at the OLTP level and all historical and document data is synchronized using a proprietary document replication service. The system is constructed to offer a worst case 5-minute recover point objective in the event of a single site catastrophic failure.

Since data is replicated to geographically dispersed data centers traditional backups are unnecessary, while DocuSign does make 8 perpetual backups of blob data, along with weekly full and daily differential backups of the database as well as maintaining 5 active nodes. In the event of a disaster or total site failure in any of the active systems, all user activity is served by the remaining. DocuSign's failover capability is tested monthly during monthly site maintenance.

DocuSign's datacenters are commercial-grade, PCI DSS compliant, and SSAE 16, SOC 1 Type 2, SOC 2 Type 2 examined and tested. DocuSign 's carrier-grade Architecture features three simultaneously active & redundant systems that allow the overall system to survive full site outages so it's "always on". Customer data is stored up to nine times across the three geographically disparate locations. RTO = 15 mins RPO = 5 min.

3.1.10.5 Shall be capable of functioning across heterogenous computing platforms.

Yes, DocuSign is an on-demand SaaS (Software as a Service) platform. Aside from an HTML5 web browser, which is standard on most mainstream browsers, for signing and a PDF reader to optionally view

documents which may be exported from DocuSign, there are no additional software requirements. No browser plug-ins, extensions, or add-ons are required. For the latest requirements:

<https://support.docusign.com/guides/ndse-user-guide-system-requirements>

3.1.11 Integration

3.1.11.1 Shall have an open published API that is easily accessible to DOT developers to integrate into DOT applications.

Yes, One of DocuSign's primary focuses is to enable other systems to originate, monitor, and process contract execution workflows programmatically. DocuSign's service is accessible via an open and published API. DocuSign supports both SOAP and REST APIs that allow customers to easily and quickly integrate any of DocuSign's features into systems, including workflow.

With DocuSign's APIs, you can:

- Use the most comprehensive range of functionality that can readily integrate REST and SOAP APIs
- Automate and standardize your business processes from end-to-end
- Access our Developer Center with extensive developer tools including sample code and high-performance sandbox DocuSign's APIs enable straight-through processing with all your productivity systems and seamless integrations with back-office systems. Our APIs also support and streamline the most complex workflows.

The DocuSign advantage is clear.

| DocuSign APIs | Other eSignature Provider's APIs |
|--|---|
| ✓ #1 rated and most powerful REST and SOAP APIs (per ProgrammableWeb) | — Lower-rated APIs (Per Programmable Web), "no other products come close" |
| ✓ REST & SOAP APIs, 3,500+ certified customer integrations, robust sample code, documentation, and developer support | — Minimal sample code and documentation available |
| ✓ 10 SDKs (including iOS Mobile SDK – including offline) | — No robust SDKs available, no iOS mobile SDK |
| ✓ 90%+ developer mindshare on Stack Overflow and presence on Git Hub | — < 5% developer mindshare on Stack Overflow, |
| ✓ Almost 60% of transactions completed using the DocuSign API | — < 33% of transactions completed using the API |

Customers can easily create custom applications using a multitude of developer resources at their disposal to do so. DocuSign can also create these applications on customer's behalf. DocuSign is the only vendor to

support integrations with six different SDKs, including the only vendor to provide customers with an iOS mobile SDK for custom app integration on Apple devices.

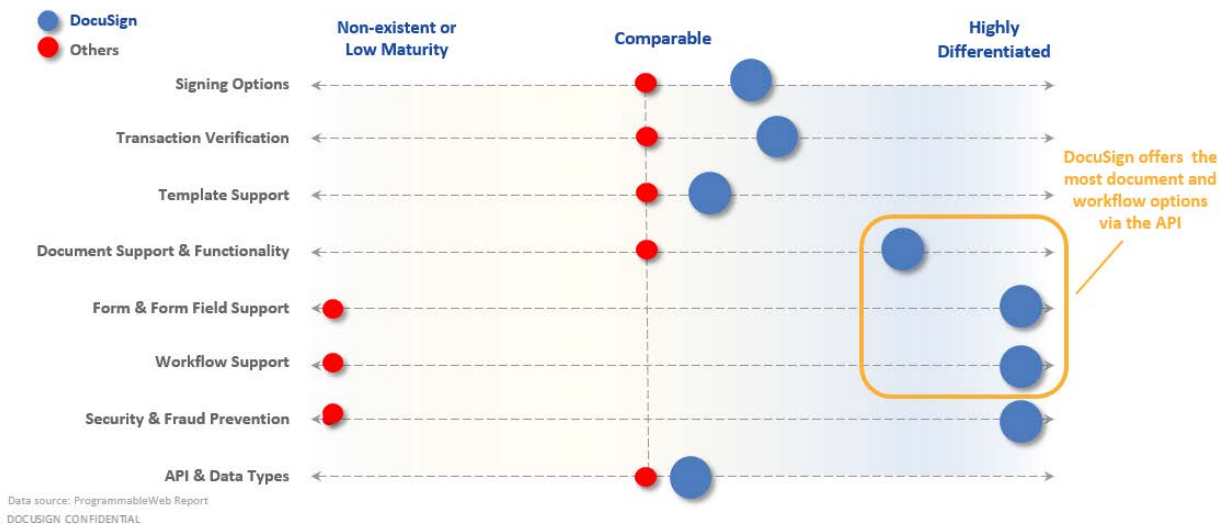
DocuSign was rated the #1 eSignature API by ProgrammableWeb, the leading API industry analyst firm.

ProgrammableWeb is quoted as saying in the report that *“It’s hard to look closely at these products and not conclude that DocuSign is in a class by itself. The DocuSign API is far more comprehensive than the rest. The documentation, sample code, tools, and community are superior to that of all the other products. And no other product came close...”*

“Our evaluation showed that DocuSign has the greatest breadth of features available under the API, the best developer tools and the best code samples and documentation.”

ProgrammableWeb Rankings of DocuSign’s API

DocuSign’s APIs are ranked #1 in every category



DocuSign has over 90% mindshare of all eSignature solutions on Stackoverflow.com and has the largest developer community by many multiples with over 80,000 developers accounts registered. DocuSign has completed and certified more than 3,500 customer integrations, far more than any other vendor.

DocuSign's service is accessible via an open and published API. DocuSign supports both SOAP and REST APIs that allow customers to easily and quickly integrate any of DocuSign’s features into systems including workflow. Mobile channels can make use of DocuSign’s open APIs. DocuSign’s REST API offers a lightweight interface conceived for use with mobile devices and has been used by several customers in the development of powerful, mobile solutions. DocuSign has also delivered the industry’s first Mobile SDK for

iOS that enables mobile developers to build Digital Transaction Management (DTM) and electronic signing capabilities natively into mobile apps. More information can be found at <https://www.docusign.com/developer-center>.

3.1.11.1.1 APIs shall be available in both REST and SOAP.

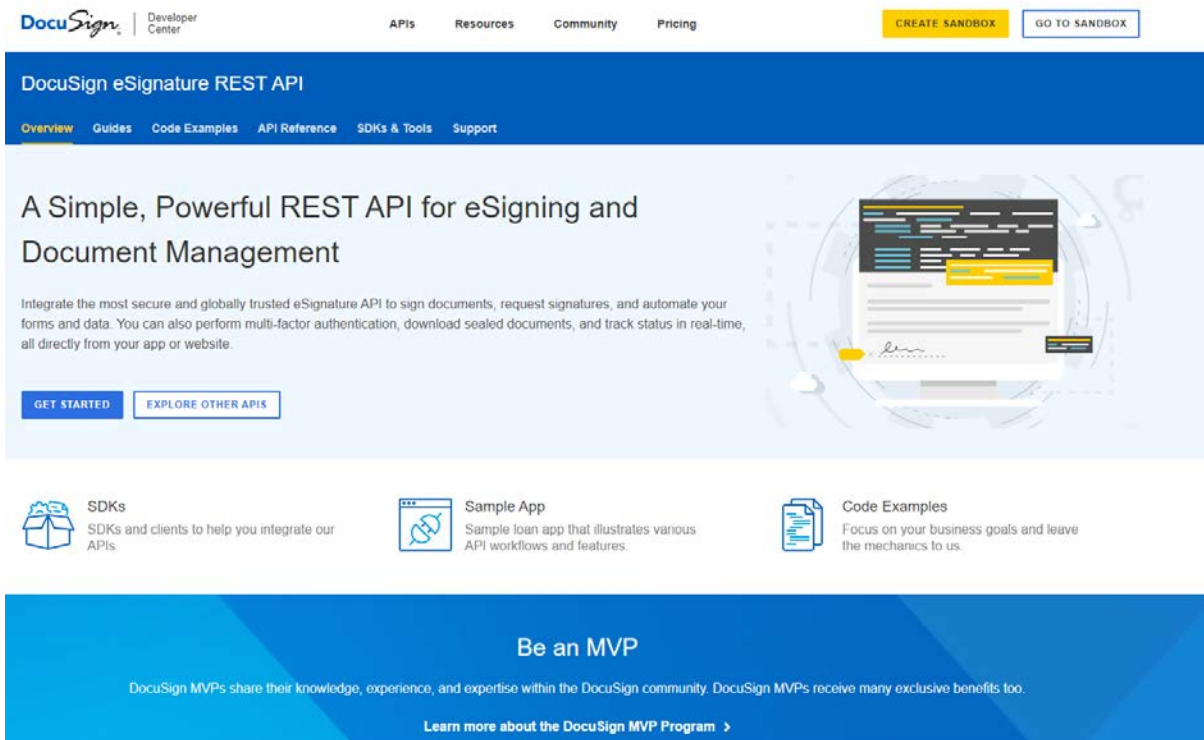
Yes, DocuSign provides both REST and SOAP APIs.

3.1.11.1.2 Tools available to support APIs shall:

3.1.11.1.2.1 Have a developer center/forum.

Yes, DocuSign provides an extensive Developer Center. The Developer Center, <https://developers.docusign.com/>, is the central portal for all resources and information that a developer needs to create apps and integrations for DocuSign products. It is geared toward beginner and experienced developers alike. The Developer Center contains all resources that developers need to get started, including:

- Quick-start guides
- API reference information
- API documentation for all API families
- Software Development Kits (SDKs) in all the popular development languages (C#, Java, Node.js, PHP, Objective-C, and more)
- Development tools
- Developer newsletter sign-up
- Additional resources (developer blog, MVP program, support info, etc.)



Who should use the Developer Center?

The Developer Center should be used by all developers looking to integrate DocuSign technologies. It can be used by developers of all skill levels to create a sandbox, learn about the development process, and Go-Live with integrations. The Developer Center even contains links to tools that can be used to learn common use-cases, such as embedded signing, as well as executing API methods and seeing results without writing any code with our API Explorer.

Is there a fee for the Developer Center?

No, there is no charge for the Developer Center. DocuSign is committed to empowering Developers and enabling them to easily integrate DocuSign within an organization's IT applications. We want our customers to have full access to our tools and support and providing the Developer Center free of charge will allow them to fully adopt DocuSign and experience the benefits.

3.1.11.1.2 Offer certificate-based API security access for integrated applications.

DocuSign is a cloud-provided solution. WVDOT's access to the DocuSign system is via a DocuSign-provided app (web, mobile), a partner-developed integration (e.g. Salesforce), or via a WVDOT-built API integration. All of the previously listed access methods require authentication.

3.1.11.1.2.3 Allow third party systems to retrieve data, documents and audit information from the solution.

Yes, DOT can retrieve data, documents and audit information from the system using DocuSign Connect and DocuSign Retrieve.

DocuSign Connect is a push service that sends real-time envelope and recipient data updates to customer listener applications. These updates are generated by changes to the envelope as it progresses from sending to completion. Connect provides updated information about the status of these transactions, including the actual content of document form fields. Connect is useful to organizations that want a real-time view of the transactions across their user base in a centralized location. This information can be customized to drive reporting or workflow specific to that organization's needs. Customers can create multiple Connect configurations, each with different events or users, and set up different listeners to monitor those configurations.

DocuSign Retrieve is a Windows-based tool that "retrieves" envelopes, documents, and data from DocuSign for use in external systems, using the DocuSign API. Retrieve runs on your system and can be run as a one-time request or on a schedule. When run, Retrieve contacts DocuSign, and retrieves envelopes, documents, and information for those envelopes based on filters you set. DocuSign Retrieve requires additional licensing.

3.1.11.1.2.4 Be able to provide real times status/ event updates to third party applications.

Yes, DocuSign provides real time status updates through DocuSign Connect. DocuSign Connect is a push service that sends real-time envelope and recipient data updates to customer listener applications. These updates are generated by changes to the envelope as it progresses from sending to completion. Connect provides updated information about the status of these transactions, including the actual content of document form fields. Connect is useful to organizations that want a real-time view of the transactions across their user base in a centralized location. This information can be customized to drive reporting or workflow specific to that organization's needs. Customers can create multiple Connect configurations, each with different events or users, and set up different listeners to monitor those configurations.

3.1.11.1.2.5 Offer a dedicated SDK for IOS mobile development.

Yes, DocuSign offers a dedicated SDK for iOS development. If you're developing a mobile iOS app and are utilizing template driven document workflows, you'll want to check out our new iOS Offline Templates SDK. This is the first and only SDK that provides offline signing API access – allowing your users to sign while not connected to the internet. (Note: Offline signing is not available on all plans). Additionally, this SDK provides sending and signing UI components that can be integrated into your app in as little as 30 lines of code.

3.1.11.1.2.6 Offer a dedicated SDK for Android mobile development.

DocuSign offers Mobile SDK that enables mobile developers to build System of Agreement (SofA) and electronic signing capabilities natively into mobile apps. Software Development Kits (SDKs) in all the popular development languages (C#, Java, Node.js, PHP, Objective-C, and more).

3.1.11.1.2.7 Have open gateways that allow information to be passed to different computing networks.

No, DocuSign does not have open gateways.

3.1.11.1.2.8 Support embedded features for use directly in third-party applications for web and mobile.

Yes, DocuSign supports embedding in third-party applications for web and mobile.

3.1.11.1.2.9 Offer a testing environment for development and testing of applications.

Yes, DocuSign offers a Sandbox for development and testing of applications.

The DocuSign Sandbox:

- Sandbox is a safe and secure test environment
- Test functionality, scalability, and performance before production release
- Early access to DocuSign innovations and code base
- Allows IT teams to maintain separate development and production environments

Benefits for DOT

- **Develop and test** DocuSign custom integrations before production release
- **Reduce business risk and development cycles** by eliminating the need to develop in production
- **Ensure business continuity** by simulating different use cases and assessing real-world outcomes
- **Protect your DocuSign investment** as test transactions don't impact production limits

QA Sandbox Overview


Enables IT teams to develop and test custom integrations

- Targeted to **medium and large** organizations who need to test DocuSign custom integrations
- Customers can perform **ongoing testing** at normal loads (up to 3x monthly average)
- Metadata retained for up to **30 days**
- Access to Engineering Services Engineer Consultants as an optional add-on

QA Sandbox Offering Details

| | |
|---|---|
| Simulated production environment | <ul style="list-style-type: none">• Same code as production (Up to 2 weeks early for new code push)• Access to environment for coding and analysis at any time during contract period• Test transactions are watermarked and are not intended to be legally valid |
| Metadata retention | <ul style="list-style-type: none">• Retained for 30 days post-test (documents/PDFs purged after 30 days)• Includes source data, envelopes data, and templates• Storage up to 50MB/user (or 0.5MB/transaction), pooled at the account level |
| Ongoing transaction testing | <ul style="list-style-type: none">• Freedom to test normal loads at any time• 3x monthly average transactions for on-going tests through term |
| Access to Engineering Services Engineer Consultants | <ul style="list-style-type: none">• Available as an add-on for technical consulting• Advice on optimal coding/architecture• Technical support to diagnose test results |
| Performance testing | <ul style="list-style-type: none">• Not available |

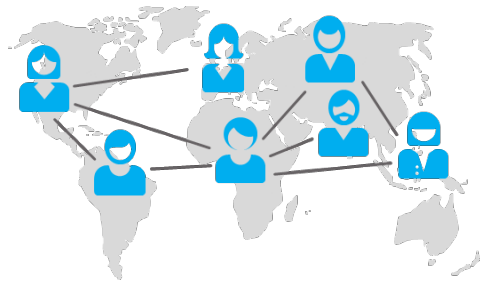
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High-Performance Sandbox Overview

Gives enterprise IT teams the ability to test performance and custom integrations in highly scalable environments

- Designed for IT teams in large enterprises that need to regularly test performance, surge, and scalability
- Customers can perform ongoing testing at normal loads (up to 3x monthly average)
- Up to 1 performance/surge test period per quarter
- Metadata retained for up to 1 year
- Access to a dedicated Professional Services Senior Engineer



The slide titled "High Performance Sandbox Overview" features a database icon and lists five key features in blue boxes on the left, with corresponding bullet points on the right. The features are: Simulated production environment, Metadata retention, Ongoing transaction testing, Access to Engineering Services Engineer Consultants, and Performance testing. The DocuSign logo is in the bottom right corner.

| Feature | Details |
|---|--|
| Simulated production environment | <ul style="list-style-type: none">Same code as production (Up to 2 weeks early for new code push)Access to environment for coding and analysis at any time during contract periodFreedom to test normal loads at any time (3x monthly average load)Test transactions are watermarked and are not intended to be legally valid |
| Metadata retention | <ul style="list-style-type: none">Retained up to 1 year post-test (documents/PDFs purged after 30 days)Includes source data, envelopes data, and templatesStorage up to 50MB/user (or 0.5MB/transaction), pooled at the account level |
| Ongoing transaction testing | <ul style="list-style-type: none">Users up to annual purchased limit3x monthly average transactions for on-going tests through termUp to 2,000 API calls/hour |
| Access to Engineering Services Engineer Consultants | <ul style="list-style-type: none">Available for technical consulting for up to 10 hours/quarterAdvice on optimal coding/architectureTechnical support to diagnose test results |
| Performance testing | <ul style="list-style-type: none">Up to one performance test/quarter10x the forecasted daily envelope average per test period and 2,000 API calls/hourTest period includes one primary test and one remediation test in a weekReservations required for test period, pending availability |

DocuSign is the only vendor that supports a high-performance Sandbox

3.1.11.1.2.10 Include at a minimum the following integrations/pre-built connectors that are out-of-the box.

A. BlueBeam

Yes, DocuSign offers an existing integration into BlueBeam software.

B. Adobe Reader and

DocuSign offers a Print Driver that allows for the sending of documentation to DocuSign. The Print Driver can be used from any application (including Adobe Reader and Acrobat) to initiate the process of a DocuSign transaction.

C. Adobe Acrobat

DocuSign offers a Print Driver that allows for the sending of documentation to DocuSign. The Print Driver can be used from any application (including Adobe Reader and Acrobat) to initiate the process of a DocuSign transaction.

D. Microsoft Office 2016 applications

Yes, DocuSign integrates with Microsoft Office 2016 applications. Through a long-term strategic partnership with Microsoft, DocuSign has made its industry-leading eSignature apps and Digital

Transaction Management functionalities widely available to businesses and consumers within Microsoft applications.

Robust apps for Outlook, Word, SharePoint, Dynamics 365 CRM, and Windows are making it easier for organizations of every size, industry, and geography to quickly and securely transact business anytime, anywhere, on any device.

Microsoft is a long-time DocuSign customer, using DocuSign in more than 316 use cases around the world. These use cases were made possible by DocuSign's robust technical capabilities, legal compliance, and unmatched security platform. Microsoft has worked diligently with our U.S. based Account Management and Customer Success Architect teams. DocuSign and Microsoft continue to identify use cases to continue to streamline their workforce of over 115,000 employees worldwide.

As recognition for its overall user experience, performance and integration into Microsoft Office and SharePoint, DocuSign's eSignature and Digital Transaction Management (DTM) platform were awarded first place winner in the Best Mobile App award as part of the Office App Awards at Microsoft Ignite 2016. DocuSign was recognized as the 2014 Microsoft Office and SharePoint App Developer Partner of the Year Award.



DocuSign for Word - DocuSign for Word is simple to use and enables individuals or organizations of any size to securely send and sign important documents right from Word. Increase productivity and transact faster by keeping business digital.



DocuSign for Outlook - DocuSign for Outlook lets you sign and return any document from Outlook within seconds. DocuSign works seamlessly within Outlook allowing you to collect signatures and other information on documents.



DocuSign for SharePoint - DocuSign for SharePoint enables organizations to legally and securely send, sign, and track important documents stored electronically in SharePoint. Easily access, manage, and control documents from a central location so that you can enhance productivity, transact faster, manage compliance, and keep your business moving.



DocuSign for Dynamics 365 CRM - DocuSign for Dynamics 365 CRM helps Microsoft Dynamics 365 CRM customers send contracts for signature directly from the application. Your customers can sign documents from any browser — including mobile devices — within minutes, and update Dynamics 365 CRM data at the same time. Delight your customers and close deals faster.



DocuSign for Windows - DocuSign for Windows makes it easier than ever to sign a document and get electronic signatures from others. Store and manage all your signed documents with your DocuSign account and OneDrive for Business. Finish tasks faster by going 100% digital.

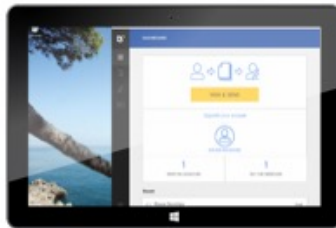
How You Can Use DocuSign with Microsoft

Out of the Box Integrations



DocuSign for Word
DocuSign for SharePoint
DocuSign for Outlooks
DocuSign for Dynamics CRM

Mobile & Desktop App



DocuSign for Windows 10
DocuSign for Windows 8.1

API



Customize using leading APIs

DocuSign for Microsoft

Use DocuSign right from the applications you're using everyday



- Easily install from Office Store, Microsoft Store or PinPoint
- Single Sign in with O365 credentials, powered by Azure Active Directory.
- Save completed documents to OneDrive for Business
- ✓ Improve productivity for entire organization by reducing steps to DocuSign
- ✓ Ensure all contracts and agreements across your org and secure, tracked and saved centrally
- ✓ Control and manage business agreements and contracts
- ✓ Eliminate paper and enable a digital workplace
- ✓ Increase the use of existing investments

3.1.12 Additional Requirements

3.1.12.1 Shall include an option for document storage.

DocuSign offers several options for document storage. The document retention policy is configurable by the client. Most clients leave signed documents in the DocuSign system indefinitely to retain an independent third party that can warrant the documents have been securely stored and have not been altered. It is also common for clients to utilize the DocuSign Connect publisher service to deposit copies of signed documents in their integral document repositories and applications so that a local copy is kept behind their firewall and readily accessible. However, DocuSign supports the unique retention policies of each of its clients by enabling them to remove documents from the system as well. This can be performed on a policy-basis according to a pre-defined schedule (e.g. 14 days after completion); or it can be performed on the explicit basis upon instructions from a client system. In either of these cases, DocuSign will remove the documents from the system, though it will maintain the audit log so that it can vouch for the execution history of the documents.

The DocuSign storage repository is updated automatically as envelopes are routed and signed. Using DocuSign API, it is possible to download from the repository. You access the envelopes stored with DocuSign via either the DocuSign Console, DocuSign Retrieve, or potentially a DocuSign API integration.

DocuSign integrates seamlessly with your existing systems through pre-built connectors.

- **CRM Systems:** Salesforce, SugarCRM, Microsoft Dynamics.
- **Productivity:** Office 365, Microsoft Word, Microsoft Outlook, Google
- **ERP/CLM:** NetSuite, Apttus, SAP, Arriba, ContractLogix
- **Cloud Storage:** Google Drive, Box, Dropbox, SharePoint

For more information on DocuSign's solutions: <https://www.docusign.com/solutions/connectors>

3.1.13 Scalability and Licensing

3.1.13.1 Shall have the ability to support growing transaction volumes.

Yes, DocuSign has a robust, scalable solution for our electronic signature platform. On average, more than 1.1 million transactions are DocuSigned per day, which is less than 20% of our deployed capacity. DocuSign's product offering can scale both horizontally and vertically. Each tier can scale independently of the other tiers allowing DocuSign to address bottleneck related issues at the source of the problem. Additionally, DocuSign has architected our product to scale to multiple site instances to allow us to scale geographically and to split load to multiple sites.

A great example of capacity would be a major US Telecom provider, who use DocuSign across their retail estate in the US. During the launch of the iPhone 6, we were processing over 100,000 transactions per hour across multiple channels. They were the only US carrier not to suffer system outages during this time and gained market share from their competitors. This provider now forecasts savings of over \$200 million over the next three years by using the DocuSign platform.

This load is handled by scaling the platform both vertically and horizontally according to usage trends and contractual commitments with an 18-month moving window. Meanwhile, the secured multi-tenant structure ensures that the platform runs at much less than 50% of total capacity and that no one customer's spike in usage impinges on other customers. As data is replicated in near-real-time over dedicated fiber links to each regional-datacenter, user sessions are served using the network-nearest datacenter to improve the user experience. This distributed nature also ensures data resiliency for disaster recovery purposes with an RPO of 5 minutes and an RTO of 15 minutes.

3.1.13.2 Shall have the ability to support multiple locations.

Yes, DocuSign can support all DOT locations.

3.1.13.3 If the license is based on a per user/# of transactions basis

3.1.13.3.1 DOT shall have the ability to pool the total number of transactions so that they are available to all licensed users.

Yes, all DocuSign transactions are pooled amongst all your DocuSign licenses users.

3.1.13.3.2 Unused transactions will roll over and be available for use for the life of the contract.

Yes, all transactions included in your subscription are valid for the duration of the contract period. They expire at the end of the contract term and do not roll over to new contract periods.

3.1.13.3.3 DOT shall have the ability to procure additional transactions for the license pool.

Yes, DocuSign will allow for adding on additional transactions during the contract period.

3.1.14 Security

3.1.14.1 Solution shall be able to ensure sensitive customer data is encrypted at rest and in motion.

Yes, DocuSign encrypts all data in transit and at rest. DocuSign encrypts data in transit using TLS 1.2 with 256-bit keys on HTTPS secured web pages; and at rest using AES encryption with 256-bit keys. In addition to document encryption, DocuSign utilizes SHA-2 hashing of data for integrity checking within our system.

3.1.14.2 Vendor data centers shall be fire-wall protected with border routers configured to defend against network attacks like Distributed Denial of Service (DDoS).

Yes, our data centers are firewall protected with border routers configured to defend against network attacks. DocuSign has contracted vendor for our **DDoS** service. In the event of an attack, we will utilize this service.

3.1.14.3 DOT shall have the option of storing and managing encryption keys on-premises or in a private cloud for advanced security.

Yes. No DocuSign personnel can decrypt. DocuSign blobs are encrypted using a randomly assigned 256-bit key from the DocuSign Encryption Key Manager (DEKM). There are 1,000 active keys at any point in time. Keys in the DEKM are protected by a DB Master Key and an additional, Operations Master Key to enforce a form of key escrow – the full key requirements are escrowed in secure procedures. Additionally, each entry in the system is doubly encrypted. This encryption key management methodology is validated and tested by a qualified-third party audit firm and is annually reported upon with DocuSign's SSAE 16 report with no exceptions.

Upon access to an encrypted blob, the DEKM is queried to return the encryption key, decrypted by the DBA Master and still encrypted by the Operations Master.

The Operations Master key is applied, and the blob encryption key is applied to the blob to system. This methodology ensures a double-blind encryption key process where no single encryption key mechanism can be applied that would result in clear-text exposure.

3.1.14.4 Vendor shall provide documentation that they conduct periodic penetration testing by qualified third parties.

Yes, DocuSign conducts penetration testing using qualified third-parties. Please refer to the Trust and Assurances Packet sent separately.

3.1.15 Monitoring and Incident Response

3.1.15.1 Shall have in place a process for monitoring for fraud and malicious activities.

Yes, DocuSign has a centralized logging, monitoring, and alerting deployment that captures and correlates log events in real-time from across systems and devices and provides unadulterated and separate alerting streams to both Operations and Security.

3.1.15.2 Shall offer a Trust Center that will work with DOT and OT resources to remediate reported data and security issues.

Yes, DocuSign provides a newly updated Trust Center (docusign.com/trust), which is now part of DocuSign.com. The new site offers expanded content and an enhanced user experience – providing customers and prospects necessary transparency into how we safeguard customers' documents and data alongside real-time information on systems performance.





At the new Trust Center, customers will find:





- **A single trusted source** for the latest DocuSign security, compliance, legal, privacy, and system performance information
- **Enriched content**, including new legal and privacy categories and more robust compliance and security sections
- **An enhanced user experience**, with a modern look and feel that's easy to navigate under docusign.com

3.1.16 Compliance

3.1.16.1 Solution shall be ISO (International Organization for Standardization) 27001:2013 (<https://www.iso.org/standard/54534.html>) and SSAE (Statement Standards for Attestation Engagements) 16 SOC (Service Order Controls) 1 and 2 (http://ssae16.com/SSAE16_overview.html) certified as an information security management system. These certifications signify that the vendor is operated a secure infrastructure and resilient environment.

Yes, DocuSign is ISO 27001:2013, SSAE18, SOC1 and SOC2 certified. DocuSign has included a list of all our certifications below.

| DocuSign has Broadest Set of Security Certifications | |
|---|---|
|  | <ul style="list-style-type: none"> ✓ Global security gold standard: ISO/IEC 27001:2013 ✓ The highest level of global information security assurance available today ✓ Defines an information security management system (ISMS) ✓ Requires business continuity and disaster recovery plans that are tested regularly <p>DocuSign is the only eSignature service that is ISO 27001:2013 certified (renewed August 2017) to all 114 optional and mandatory ISO controls across the entire organization.</p> |
|  | <ul style="list-style-type: none"> ✓ Both SOC-1 Type 2 and SOC-2 Type 2 ✓ Security framework ✓ Controls testing ✓ Effectiveness measurements ✓ Service reliability <p>Provides assurance that DocuSign complies with the reporting requirements stipulated by the American Institute of Certified Public Accountants (AICPA). We undergo yearly audits across all aspects of our enterprise business and production operations, including data centers, and have sustained and surpassed all requirements.</p> <p>DocuSign is the only eSignature or DTM vendor auditor assured to <u>both</u> SSAE 16 SOC 1 Type 2 and AT 101 SOC 2 Type 2 auditor assured. Other vendors may claim auditor assurance to one of the SOC frameworks, but their scope may be limited. DocuSign recommends comparing the details of SOC 1 and SOC 2 auditor assurances to compare scope.</p> |

| DocuSign has Broadest Set of Security Certifications | |
|--|---|
|  <p style="color: red; font-weight: bold; margin: 5px 0;">FedRAMP</p> <p style="color: #666; font-style: italic;">Authorized - Moderate</p> | <ul style="list-style-type: none"> ✓ A standardized approach to security assessment, authorization, and continuous monitoring for cloud products and services <p>DocuSign received an Authorization to Operate (ATO) and is listed on the FedRAMP marketplace with a Government Community Cloud deployment model. To date, DocuSign is the only Digital Transaction Management (DTM) solution listed on the FedRAMP marketplace. Other vendors may claim FedRAMP authorization due to association with other company projects or data vendors, but a deeper examination of the FedRAMP Certification will showcase DocuSign's differentiation.</p> |
|  | <ul style="list-style-type: none"> ✓ The first standard of its kind to focus on Digital Transaction Management (DTM) ✓ Developed to raise the bar on quality and promote more trust and confidence in online business transactions ✓ Ensures that digital transactions are protected yet accessible—regardless of where parties reside or the devices used ✓ DocuSign is the only DTM vendor certified compliant with the xDTM Standard, version 1.0 |
|  | <ul style="list-style-type: none"> ✓ Data protection ✓ General computing controls focus ✓ Comprehensive scope (both as merchant and service provider), requiring third-party audits and the deepest level of examination ✓ Certified to PCI DSS 3.2 <p>As overseen by the Payment Card Industry Security Standards Council (PCI SSC), DocuSign places stringent controls around cardholder data as both a service provider and merchant. This compliance certifies safe and secure handling of credit card holder information.</p> |
|  | <ul style="list-style-type: none"> ✓ Bestowed on cloud services that fully satisfy the most stringent requirements for data protection, identity verification, service security, business practices, and legal protection <p>This new certification demonstrates that DocuSign meets the highest CloudTrust rating possible as evaluated by Skyhigh Networks.</p> |

| DocuSign has Broadest Set of Security Certifications | |
|--|--|
|  | <p>Binding Corporate Rules</p> <p>DocuSign obtained approval of its applications for Binding Corporate Rules (BCR) as both a data processor and data controller from the European Union Data Protection Authorities. DocuSign's approved BCR enables lawful cross-border transfers of data through the DocuSign platform and eSignature service. As DocuSign implements these BCR, customers will be able to transact business with increased confidence knowing that they'll be complying with the upcoming GDPR data transfer requirements when using DocuSign. For more on DocuSign's BCR, visit GDPR and BCR on the Trust Center.</p> |
|  | <p>The FISC develops security guidelines for information systems, which are followed by most financial institutions in Japan. These include guidelines for security measures to be put in place while creating system architectures, auditing of computer system controls, contingency planning, and developing security policies and procedures. Though compliance with the FISC Security Guidelines is not required by regulation nor audited by the FISC, DocuSign elected to become a member of the FISC and implemented internal controls to be compliant with the FISC Security Guidelines.</p> |
| <p><u>EU Trusted List</u></p> | <p>DocuSign is the only global cloud and mobile-ready digital signature solution with end-to-end workflows on this list of qualified trusted service providers. Please see the following for more information (https://www.ssi.gouv.fr/uploads/2016/07/tl-fr.pdf)</p> |
| <p><i>Compilation of (EU) Member States notification on SSCDs and QSCDs</i></p> | <p>This publication lists the signature devices that shall be considered as Qualified Signature Creation Devices (QSCDs) under the eIDAS regulation. DocuSign owns and operates a remote signature device which is listed in this publication and is the leading global eSignature solution offering cloud-based eIDAS-compliant electronic signatures.</p> |

3.1.16.2 Solution shall be xDTM Standard compliant.

Yes, DocuSign maintains xDTM Standard Compliance.



The xDTM Standard Association, an independent, nonprofit organization composed of leaders from diverse industries and global enterprises, provides in-depth guidelines and best practices for creating a trusted online environment and establishes eight core requirements for trust and availability that a DTM provider must adhere to be compliant:

- **Security:** Features best-in-class technical protection, highly secure access, and proactive protection policies
- **Assurance:** Provides assurance that xDTM transactions are compliant with applicable laws
- **Privacy:** Allows a person or company to reveal information selectively, at their discretion
- **Validity:** Has a reliable, transparent, and verifiable chain of custody and a digitally signed, tamper-evident audit trail
- **Availability:** Ensures that transactions are always accessible and obtainable, high performing during peak use, resilient across disaster scenarios, and free of scheduled offline maintenance
- **Scalability:** Accepts increased volume without impacting performance due to ongoing capacity modeling and proactive lifecycle management
- **Universality:** Functions across heterogeneous environments/devices and is accessible worldwide
- **Interoperability:** Works across collaborative services environments and includes integration guidelines and APIs

A standard provides more assurance and transparency into how digital transactions are protected yet accessible when needed. Achieving xDTM certification marks a significant milestone for DocuSign and expanding our Global Trust Network.

3.1.16.3 Shall be FedRamp authorized <https://www.fedramp.gov/>

Yes, DocuSign is FedRAMP Moderate authorized. DocuSign is the only eSignature vendor to maintain FedRAMP Moderate. FedRAMP Moderate enables organizations to handle PHI and PII on behalf of government organizations.

3.1.17 Enforceability

3.1.17.1 Solution shall include an audit trail that includes message origin, author, content, and time of transmission for each transaction.

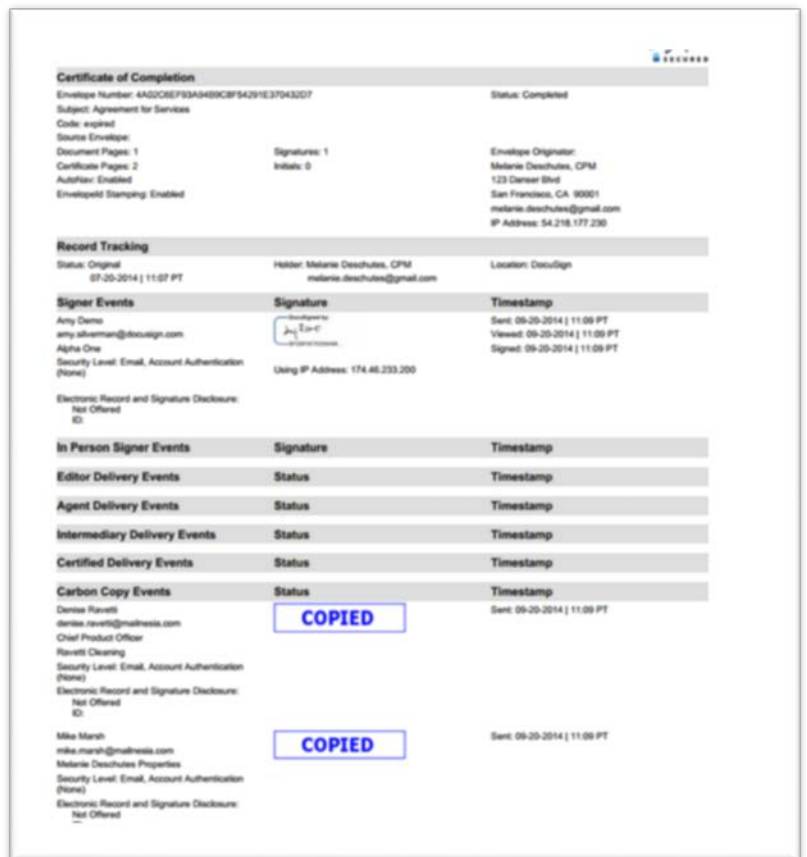
Yes, all aspects of each transaction are fully logged (including name, email address, IP address, date/time, authentication, and activity) and captured in a detailed transaction history which is stored in perpetuity as hashed and encrypted data within the DocuSign system. This data is available on demand from the DocuSign system and may also be programmatically exported to client systems in real-time as transactions progress to a completed state. In addition, DocuSign also generates a Certificate of Completion for every transaction in the form of a digitally signed PDF document which is designed to be a court admissible document.

Audit trails, such as signatures and documents, are always stored in encrypted form using an x.509 certificate. A hash is also taken before each change and compared to previous SHA-2 hash values to ensure the document has not been modified. After any change, a new hash is taken and stored physically and logically separate from the document.

DocuSign tracks activities at both a User and Transaction (Envelope) level. This is relevant both to an auditing perspective as well as driving the workflows around the document being signed. All the audit activities listed below are available to the Sending party through the user interface or programmatic API.

From the standpoint of a Signing User, DocuSign audits the following events:

- When a User was invited to sign, including whether the invitation was successfully delivered
- When a User passed (or failed) various authentication steps that were required to access the documents
- When a User agreed to a Consumer Disclosure consent
- When a User first viewed the documents
- When a User signed their documents
- Anytime a User downloaded the documents
- Anytime a User viewed the documents
- When a User declines to sign the documents
- Anytime a User marks-up a document or provides data values



From the standpoint of the Sender, DocuSign audits the following events:

- When the sender initiated the Envelope
- When the sender activated the Envelope for signature
- Anytime the sender modifies the Envelope contents or signature workflow
- Anytime the sender downloads the documents
- Anytime the sender views the documents
- When a sender voids the Envelope (revoke the ability to eSign)

From the standpoint of a Transaction: DocuSign audits the following events:

- When the Envelope was initiated
- When the Envelope was activated for signature
- When the Envelope was viewed by all parties
- When the Envelope was signed by all parties
- When the Envelope was completed
- When the Documents were deleted
- When the physical location of the electronic Envelope was transferred to another electronic vault

Additionally, audit logs include changes to Permission Sets. Changes captured include:

- New permission set
- Edited permission set
- Deleted permission set

3.1.17.2 Audit trail shall contain verifiable chain of custody that includes document/transaction, meta data and history.

Yes, all aspects of each transaction are fully logged (including name, email address, IP address, date/time, authentication, and activity) and captured in a detailed transaction history which is stored in perpetuity as hashed and encrypted data within the DocuSign system. This data is available on demand from the DocuSign system and may also be programmatically exported to client systems in real-time as transactions progress to a completed state. In addition, DocuSign also generates a Certificate of Completion for every transaction in the form of a digitally signed PDF document which is designed to be a court admissible document.

3.1.17.3 The audit trail shall be auto-generated, digitally signed and tamper-evident.

Yes, DocuSign generates a Certificate of Completion for every transaction in the form of a digitally signed PDF document which is designed to be a court admissible document.

3.1.17.4 Solution shall provide an exportable log of transaction activities.

Yes, DocuSign provides an exportable audit log.

3.1.17.5 It shall be possible to validate the integrity of signed documents and the transaction history without needing to consult the electronic signature provider.

Yes, documents exported from DocuSign are digitally signed for tamper evidence. The tamper seal is an X.509 PKI standards based "Digital Signature" that is applied to the document at the time it is downloaded

from DocuSign. The mechanism would indicate if the document has been changed since being downloaded. DocuSign provides a digital audit trail for the customer to track signing and lifetime access events. This Certificate of Completion is also tamper sealed upon download. This is so the Certificate of Completion cannot be modified after download, just like the document.

In both cases it is up to the viewer of the document to validate that the tamper seal is still intact.

3.1.17.6 Shall comply with the following laws/regulations

3.1.17.6.1 US ESIGN Act

Yes, DocuSign was the first eSignature company to warrant compliance with the U.S. ESIGN Act, state laws modeled after 1999 UETA and certain key aspects of the UK Electronic Communication Act (2000). DocuSign carries liability insurance to back this warrant, and will go to court with their customers, if needed. DocuSign has a 13-year history defending its product and has never lost a court case due to the nature of the signature used. While DocuSign fully supports electronic signatures, it is the only vendor to offer "Advanced Electronic Signature (AES)" as a cloud solution. This combines an electronic based signature with a digital signature, without the need for pre-provisioned certificates or signer accounts.

DocuSign fully enforces consumer consent, unique signature adoption and signature process flow provisions. DocuSign meets specialized rules from the FDA, FTC FHA, IRS, FINRA, among many others. We provide extensive, configurable authentication options to verify the identities of your signers.

DocuSign offers a court-admissible Certificate of Completion with a comprehensive digital audit trail to confirm the validity of your transactions.

DocuSign utilizes industry leading encryption standards, retention and storage practices and data security, so you can count on the integrity of the data to support the legality of your transactions.

Prove who signed what, when and where they signed it. Most eSignature providers meet the minimum requirements of eSignature statutes, but that is just the beginning. These statutes do not ensure your eSignature provider offers the tools to prove who signed what, or when and where they signed it. Nor do these statutes verify your eSignature provider maintains the integrity of your transaction. And these two areas, attribution and record integrity, are where DocuSign differs from other technologies. DocuSign complies with California Uniform Electronic Transactions Act (UETA). Our implementation is such that while compliant with California UETA, we also make it easy for all parties in the transaction to view and retain a copy of their signed document. We achieve this by having the industry's largest ecosystem of partners and developers, ensuring that DocuSign is always easy to use across multiple computing platforms.

3.1.17.6.2 State Laws modeled after the 1999 EUTA

Yes, DocuSign was the first eSignature company to warrant compliance with the U.S. ESIGN Act, state laws modeled after 1999 UETA and certain key aspects of the UK Electronic Communication Act (2000). DocuSign carries liability insurance to back this warrant, and will go to court with their customers, if needed.

DocuSign has a 13-year history defending its product and has never lost a court case due to the nature of the signature used. While DocuSign fully supports electronic signatures, it is the only vendor to offer “Advanced Electronic Signature (AES)” as a cloud solution. This combines an electronic based signature with a digital signature, without the need for pre-provisioned certificates or signer accounts.

DocuSign fully enforces consumer consent, unique signature adoption and signature process flow provisions. DocuSign meets specialized rules from the FDA, FTC, FHA, IRS, FINRA, among many others. We provide extensive, configurable authentication options to verify the identities of your signers.

DocuSign offers a court-admissible Certificate of Completion with a comprehensive digital audit trail to confirm the validity of your transactions.

DocuSign utilizes industry leading encryption standards, retention and storage practices and data security, so you can count on the integrity of the data to support the legality of your transactions.

Prove who signed what, when and where they signed it. Most eSignature providers meet the minimum requirements of eSignature statutes, but that is just the beginning. These statutes do not ensure your eSignature provider offers the tools to prove who signed what, or when and where they signed it. Nor do these statutes verify your eSignature provider maintains the integrity of your transaction. And these two areas, attribution and record integrity, are where DocuSign differs from other technologies. DocuSign complies with California Uniform Electronic Transactions Act (UETA). Our implementation is such that while compliant with California UETA, we also make it easy for all parties in the transaction to view and retain a copy of their signed document. We achieve this by having the industry’s largest ecosystem of partners and developers, ensuring that DocuSign is always easy to use across multiple computing platforms.

3.1.17.6.3 eIDAS regulation

Yes, DocuSign can be used in a manner that complies with a number of electronic signature and record laws and regulations, including the eIDAS regulation, EU Directive on eSignature 1999/93/EC, ESIGN Act, state laws modeled after 1999 UETA, and UK Electronic Communication Act (2000). Please visit DocuSign’s eSignature Legality Guide located at <https://www.docusign.com/how-it-works/legality/global> for more information on global electronic signature and record laws and use cases.

3.1.17.6.4 EU Directive on eSignature 1999/93/EC

Yes, DocuSign can be used in a manner that complies with a number of electronic signature and record laws and regulations, including the EU Directive on eSignature 1999/93/EC, ESIGN Act, state laws modeled after 1999 UETA, eIDAS regulation, and UK Electronic Communication Act (2000). Please visit DocuSign’s eSignature Legality Guide located at <https://www.docusign.com/how-it-works/legality/global> for more information on global electronic signature and record laws and use cases.

3.1.17.6.5 UK Electronic Communication Act (2000)

Yes, DocuSign can be used in a manner that complies with a number of electronic signature and record laws and regulations, including the UK Electronic Communication Act (2000), EU Directive on eSignature 1999/93/EC, ESIGN Act, state laws modeled after 1999 UETA, and eIDAS regulation. Please visit DocuSign's eSignature Legality Guide located at <https://www.docusign.com/how-it-works/legality/global> for more information on global electronic signature and record laws and use cases.

3.1.17.7 Vendor shall be able to warrant compliance with the above laws and be available to testify in court to the validity of transactions created with the proposed solution.

Yes, DocuSign offers a court-admissible Certificate of Completion with a comprehensive digital audit trail to confirm the validity of your transactions.

We will go to court with you. While DocuSign has a successful history of providing customers with all the evidence they need to defend their documents against repudiation, DocuSign is available to assist our customers with legal challenges by testifying in court to support the validity of DocuSigned documents, including consent.

3.1.18 Vendor Experience

3.1.18.1 System shall be currently in use in situations that involve high volume transaction and multi-location environments.

DocuSign has a robust, scalable solution for our electronic signature platform. On average, more than 1.1 million transactions are DocuSigned per day, which is less than 20% of our deployed capacity. DocuSign's product offering can scale both horizontally and vertically. Each tier can scale independently of the other tiers allowing DocuSign to address bottleneck related issues at the source of the problem. Additionally, DocuSign has architected our product to scale to multiple site instances to allow us to scale geographically and to split load to multiple sites.

A great example of capacity would be a major US Telecom provider, who use DocuSign across their retail estate in the US. During the launch of the iPhone 6, we were processing over 100,000 transactions per hour across multiple channels. They were the only US carrier not to suffer system outages during this time and gained market share from their competitors. This provider now forecasts savings of over \$200 million over the next three years by using the DocuSign platform.

3.1.18.2 System shall currently be in use for organizations that require digital sealing of engineering plan sets.

Yes, DocuSign is capable of adding seals and signatures to engineering drawings. Please note, this is subject to file size limitations.

3.1.18.3 Vendor shall have a dedicated security team.

Yes, DocuSign maintains a dedicated security team.

3.1.19 Software Maintenance and Technical Support

3.1.19.1 Support shall be available Monday through Friday from 8:00 a.m. to 5:00 p.m. EST

Yes, DocuSign provides 24x7 support.

Operating Hours

| Support Levels | Free | Plus | Premier | Enterprise |
|--------------------------|------------------------------|---|---|---|
| Contact Method (Channel) | Online Case Chat Phone | Online Case Chat Phone Click-to-Call | Online Case Chat Phone Click-to-Call Email | Online Case Chat Phone Click-to-Call Email |
| Hours of availability * | 24/7 7 days a week | Sun: 2:30 – 11 PM PT Mon - Thurs: 24/7 Fri: 12 AM – 8 PM PT | Sun: 2:30 – 11 PM PT Mon - Thurs: 24/7 Fri: 12 AM – 8 PM PT | Sun: 2:30 – 11 PM PT Mon - Thurs: 24/7 Fri: 12 AM – 8 PM PT |

3.1.19.2 Online and telephone support for DOT staff and outside staff that DOT has included in the process, shall be provided

Yes, DocuSign provides online and telephone support. Get the answers you need, the way you want them. DocuSign Customer Support is here to give you the assistance you need so that you get the results you expect. Our industry-leading, global support model is there to back you up, no matter where you do your business. We provide you access to the expertise you want, whether through our communities, our knowledge base and on-demand training, or our team of experienced technical support professionals, who know you and your solutions. And we are set up to work the way you want, whether by phone, chat, email or web.

| Deliverable | Enterprise Premier |
|--|--------------------|
| 24x7 System Availability Monitoring | ✓ |
| Self Service Resources, including DocuSign Community, Support Portal, Knowledge Base | ✓ |
| 24x7 Sender and Signer Live Chat Support | ✓ |
| Online case Submission and Management | ✓ |
| Case Submission Response Time Target | 2 hours |
| 24x7 Live Phone Support | ✓ |
| Escalated Tier 2 Support | ✓ |
| DocuSign Demo/Sandbox Environment Access | ✓ |
| DocuSign Integration Support (APIs, Connectors) | ✓ |
| 24x7 Global Emergency Support | ✓ |
| Emergency Response Time Target | 30 minutes |
| Proactive Monitoring of Cases | ✓ |
| Adoption Network | ✓ |
| Administrator Certification Class | 1 user |
| Technical Customer Success Manager* | ✓ |

Support Services Explained

- **24x7 System Availability Monitoring:** DocuSign Trust Site for real-time system status and notifications
- **Support Portal and Knowledge Base:** Search for answers and submit Support requests
- **DocuSign Community:** Q&A community staffed by DocuSign employees and power users of our product
- **24x7 Sender and Signer Live Chat Support:** Chat Support for simple questions on signing, sending and account management
- **Online Case Submission and Management:** Submit cases online for assistance from our Support Team
- **24x7 Live Phone Support:** Talk to our DocuSign Support Team for technical DocuSign questions, billing inquiries and account support
- **Escalated Support - Tier 2:** Direct access to a senior technical resource as part of standard support escalation process.
- **DocuSign Demo/Sandbox Environment Access:** Test your current code against upcoming releases or add your new code to test prior to releasing into production
- **DocuSign Integration Support (Connectors):** Support for connections to complementary solutions such as Salesforce, Microsoft, and Google.
- **24x7 Emergency Support:** 30-minute response to Severity 1 technical incidents

- **Proactive Monitoring of Cases:** Ongoing tracking and review of cases opened to identify trends, possible issues, or opportunities for improved use of DocuSign
- **Deliverables:** CSA Certification course for one user through DocuSign University; 2-hours of office hour access to DocuSign CSA team; access to Adoption Network gated community

3.1.20 Professional Services

3.1.20.1 Professional services shall be available, on an hourly basis, to assist DOT in developing templates, workflows, integration, etc. Rates and Service Type shall be detailed in Exhibit A.

Yes, DocuSign offers Professional Services. We've found that our most successful customers benefit from having the added expertise to fast-track deployment through a more collaborative, hands-on experience. DocuSign Professional Services can augment your team to strategize, architect, implement, or connect the platform with other enterprise systems. DocuSign's expansive library of pre-built connectors paired with our integration expertise gives you the confidence to move from digital to connected agreements seamlessly.

Professional Services Capabilities

With the right blend of expertise, DocuSign's Professional Services team can help you strategize, implement, or mature your System of Agreement.

Along the way, we also help customers leverage best practices and industry tools, explore high-impact expansion opportunities elsewhere in the business, and help effectively manage change and governance, or identify ways to optimize core processes and functions using DocuSign.

Partner with our Professional Services team for:

- Solution visioning and roadmap development
- Solution implementation and integration
- Best practices and industry expertise
- Ongoing product or platform advice
- Center of Excellence design and change management

Professional Services Highlights

- 245M Transactions enabled in 2018
- 14,500+ Services engagements in 2 years
- 8,300 Services engagements in FY18
- 2,000+ use cases deployed by our Customer Success Architects
- 50% decrease in deployment time

Advantages of DocuSign Services and Support



Achieve key business outcomes digitally



Increase speed to value



Minimize Risk

3.1.20.2 Online Training—both self-paced and instructor led online training shall be available.

3.1.20.2.1 Self-paced training shall be available on-demand for all users. Self-paced training shall be available for both users and administrators.

Yes, DocuSign provides online self-paced training for all users.

| DocuSign offers a broad set of training programs to meet your individual needs. | |
|---|--|
| Rapid Adoption Program (Onboarding) | All Rapid Adoption Program participants will go through DocuSign's standard customer onboarding process and materials and will have access to DocuSign University's self-paced learning paths on product functionality via the DocuSign Learning Portal in the first 90 days. Additional training is offered by DocuSign's Learning and Enablement team. |
| FastStart Implementations – Train-the-Trainer | <p>All FastStart implementations include one DocuSign Administrator Train-the-Trainer session (up to 2 hours) covering the new deployment and account administration for a maximum of five users (if necessary). Includes DocuSign's standard Train-the-Trainer materials consisting of a presentation based on the Configuration Workbook that's delivered during the project closeout process which can be used by the customer to conduct end user training.</p> <p>The DocuSign API FastStart will also include an additional one-hour overview training on DocuSign APIs that's focused on the customer's integration solution.</p> |
| Custom Engagements | <p>For larger custom engagements and deployments, learning and enablement services are often bundled into statements of work or sold separately post-implementation to support a customer's deployment or learning strategy.</p> <p>Below is a high-level overview of DocuSign's Learning and Enablement capabilities:</p> <ul style="list-style-type: none"> ▪ Self-paced Learning ▪ Virtual Instructor-led Workshops ▪ Custom End User Training |

| DocuSign offers a broad set of training programs to meet your individual needs. | |
|---|--|
| | <ul style="list-style-type: none"> ▪ Admin Courses ▪ Custom Videos ▪ Enterprise Enablement Packages |
| DocuSign University (DSU) | <p>The DocuSign University Learning Portal provides DocuSign users with access to an extensive catalog of self-paced and instructor-led courses to help build knowledge and expand expertise. To support an organization's learning needs, courses are available for a wide range of DocuSign roles and in multiple languages to learn DocuSign anywhere, anytime. See Learning & Enablement section for a complete portfolio of services.</p> |

Training Approach

Below is a visual illustration of DocuSign's approach to how we develop a and deliver an Enterprise Enablement Program.



3.1.20.2.2 Online Instructor Led training shall be available for both users and administrators. These can be at a pre-defined schedule; however, they shall be available a minimum of once every 6 months.

Yes, DocuSign can provide online, instructor-led training for users and administrators.

DESIGNATED CONTACT AND CERTIFICATION FORM

Please see the following page for the fully executed Designated Contact and Certification Form.

DESIGNATED CONTACT: Vendor appoints the individual identified in this Section as the Contract Administrator and the initial point of contact for matters relating to this Contract.

DocuSigned by:
Jacob Holler Account Representative
(Name, Title)
Jacob Holler, Account Representative
(Printed Name and Title)
1860 Michael Faraday Drive, Suite 100, Reston, VA 20190
(Address)
703.581.6581 / 703.871.8505
(Phone Number) / (Fax Number)
Jacob.Holler@Carahsoft.com
(email address)

CERTIFICATION AND SIGNATURE: By signing below, or submitting documentation through wvOASIS, I certify that I have reviewed this Solicitation in its entirety; that I understand the requirements, terms and conditions, and other information contained herein; that this bid, offer or proposal constitutes an offer to the State that cannot be unilaterally withdrawn; that the product or service proposed meets the mandatory requirements contained in the Solicitation for that product or service, unless otherwise stated herein; that the Vendor accepts the terms and conditions contained in the Solicitation, unless otherwise stated herein; that I am submitting this bid, offer or proposal for review and consideration; that I am authorized by the vendor to execute and submit this bid, offer, or proposal, or any documents related thereto on vendor's behalf; that I am authorized to bind the vendor in a contractual relationship; and that to the best of my knowledge, the vendor has properly registered with any State agency that may require registration.

Carahsoft Technology Corporation
(Company)
Jennifer Kanach Jennifer Kanach, Proporsals Director
(Authorized Signature) (Representative Name, Title)
Jennifer Kanach, Proposals Director
(Printed Name and Title of Authorized Representative)
08/27/18
(Date)
703.871.8500 / 703.871.8505
(Phone Number) (Fax Number)

ADDENDUM ACKNOWLEDGEMENT FORM

Please see the following page for the fully executed Addendum Acknowledgement Form.

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: CRFQ DOT1900000008

Instructions: Please acknowledge receipt of all addenda issued with this solicitation by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

Acknowledgment: I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specification, etc.

Addendum Numbers Received:

(Check the box next to each addendum received)

- | | |
|--|--|
| <input checked="" type="checkbox"/> Addendum No. 1 | <input type="checkbox"/> Addendum No. 6 |
| <input type="checkbox"/> Addendum No. 2 | <input type="checkbox"/> Addendum No. 7 |
| <input type="checkbox"/> Addendum No. 3 | <input type="checkbox"/> Addendum No. 8 |
| <input type="checkbox"/> Addendum No. 4 | <input type="checkbox"/> Addendum No. 9 |
| <input type="checkbox"/> Addendum No. 5 | <input type="checkbox"/> Addendum No. 10 |

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further understand that any verbal representation made or assumed to be made during any oral discussion held between Vendor's representatives and any state personnel is not binding. Only the information issued in writing and added to the specifications by an official addendum is binding.

Carahsoft Technology Corporation

Company


Authorized Signature

08/27/18

Date

NOTE: This addendum acknowledgement should be submitted with the bid to expedite document processing.

EXHIBIT A – PRICING PAGE

Please see the following page for the fully executed Exhibit A – Pricing Page.

**Pricing Page Exhibit A
Digital Signature and Digital Transaction Management
CRFQ DOT1900000008**

* Quantities are estimated for bid evaluation purposes only.

| Item Description | Unit Price | Quantity | Total Cost |
|------------------------------------|-------------|----------|--------------|
| Licenses (100 Annual Transactions) | \$ 622.20 | 30 | \$ 18,666.00 |
| Licenses (200 Annual Transactions) | \$ 1,317.60 | 10 | \$ 13,176.00 |
| Licenses (500 Annual Transactions) | \$ 2,928.00 | 10 | \$ 29,280.00 |

| Item Description | | Total Cost |
|--------------------|--------|------------|
| Annual Maintenance | Year 1 | |
| Annual Maintenance | Year 2 | |
| Annual Maintenance | Year 3 | |
| Annual Maintenance | Year 4 | |

DocuSign is a Subscription Service, there is no maintenance, just your ongoing annual subscription cost

| Item Description | Hourly Rate | Estimated Quantity | Total Cost |
|---|-------------|--------------------|-------------|
| Developing Templates, Workflows, Intergration | \$ 250.00 | 20 | \$ 5,000.00 |

| Item Description | Price | Estimated Quantity | Total Cost |
|--|-------------|--------------------|-------------|
| General User Class - Online / On demand class for 50 users 12 month availability | \$ - | 1 | |
| General User Class - Online / Instructor led class for 50 users one (1) scheduled class | \$ 3,000.00 | 1 | \$ 3,000.00 |
| Administrator Class - Online / Instructor led class for 5 Users one (1) scheduled class | \$ 6,000.00 | 1 | \$ 6,000.00 |

General User Class - Online / On demand class for 50 users at a 12 month availability is Included with Adoption Quickstart at no cost.

| | | |
|------------------|----|-----------|
| Total Bid Amount | \$ | 75,122.00 |
|------------------|----|-----------|

Vendor Information

Contract Manager: Jacob Holler

Address: 1860 Michael Faraday Drive, Suite 100

Reston, VA 20190

Phone: 703.581.6581

Fax: 703.871.8505

Email: Jacob.Holler@Casabsorb.com

Signature:

Jacob Holler

424BA17B902C4E3...

DISCLOSURE OF INTERESTED PARTIES OF CONTRACT FORM

Please see the following page for the fully executed Disclosure of Interested Parties of Contract Form.

West Virginia Ethics Commission
Disclosure of Interested Parties to Contracts

(Required by *W. Va. Code* § 6D-1-2)

Name of Contracting Business Entity: Carahsoft Technology Corporation Address: 1860 Michael Faraday Drive, Suite 100
Reston, VA 20190

Name of Authorized Agent: Jennifer Kanach Address: 1860 Michael Faraday Drive, Suite 100, Reston, VA 20190

Contract Number: DOT1900000008 Contract Description: Digital Signature Transaction Management

Governmental agency awarding contract: Department of Transportation

Check here if this is a Supplemental Disclosure

List the Names of Interested Parties to the contract which are known or reasonably anticipated by the contracting business entity for each category below (*attach additional pages if necessary*):

1. Subcontractors or other entities performing work or service under the Contract

Check here if none, otherwise list entity/individual names below.

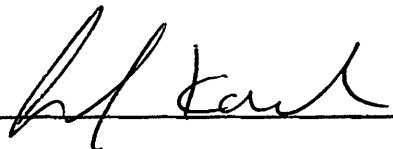
2. Any person or entity who owns 25% or more of contracting entity (not applicable to publicly traded entities)

Check here if none, otherwise list entity/individual names below.

Craig P. Abod, President of Carahsoft Technology Corporation

3. Any person or entity that facilitated, or negotiated the terms of, the applicable contract (excluding legal services related to the negotiation or drafting of the applicable contract)

Check here if none, otherwise list entity/individual names below.

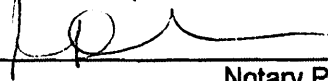
Signature:  Date Signed: 8/27/18

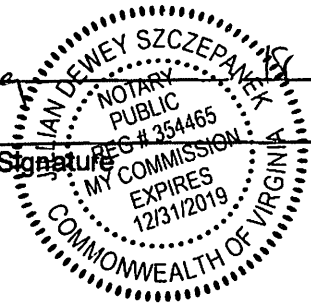
Notary Verification

State of WA, County of Fairfax:

I, Jennifer Kanach, the authorized agent of the contracting business entity listed above, being duly sworn, acknowledge that the Disclosure herein is being made under oath and under the penalty of perjury.

Taken, sworn to and subscribed before me this 27 day of August.


Notary Public's Signature



To be completed by State Agency:
Date Received by State Agency: _____
Date submitted to Ethics Commission: _____
Governmental agency submitting Disclosure: _____

PURCHASING AFFIDAVIT

Please see the following page for the fully executed Purchasing Affidavit

STATE OF WEST VIRGINIA
Purchasing Division

PURCHASING AFFIDAVIT

CONSTRUCTION CONTRACTS: Under W. Va. Code § 5-22-1(i), the contracting public entity shall not award a construction contract to any bidder that is known to be in default on any monetary obligation owed to the state or a political subdivision of the state, including, but not limited to, obligations related to payroll taxes, property taxes, sales and use taxes, fire service fees, or other fines or fees.

ALL CONTRACTS: Under W. Va. Code §5A-3-10a, no contract or renewal of any contract may be awarded by the state or any of its political subdivisions to any vendor or prospective vendor when the vendor or prospective vendor or a related party to the vendor or prospective vendor is a debtor and: (1) the debt owed is an amount greater than one thousand dollars in the aggregate; or (2) the debtor is in employer default.

EXCEPTION: The prohibition listed above does not apply where a vendor has contested any tax administered pursuant to chapter eleven of the W. Va. Code, workers' compensation premium, permit fee or environmental fee or assessment and the matter has not become final or where the vendor has entered into a payment plan or agreement and the vendor is not in default of any of the provisions of such plan or agreement.

DEFINITIONS:

"Debt" means any assessment, premium, penalty, fine, tax or other amount of money owed to the state or any of its political subdivisions because of a judgment, fine, permit violation, license assessment, defaulted workers' compensation premium, penalty or other assessment presently delinquent or due and required to be paid to the state or any of its political subdivisions, including any interest or additional penalties accrued thereon.

"Employer default" means having an outstanding balance or liability to the old fund or to the uninsured employers' fund or being in policy default, as defined in W. Va. Code § 23-2c-2, failure to maintain mandatory workers' compensation coverage, or failure to fully meet its obligations as a workers' compensation self-insured employer. An employer is not in employer default if it has entered into a repayment agreement with the Insurance Commissioner and remains in compliance with the obligations under the repayment agreement.

"Related party" means a party, whether an individual, corporation, partnership, association, limited liability company or any other form or business association or other entity whatsoever, related to any vendor by blood, marriage, ownership or contract through which the party has a relationship of ownership or other interest with the vendor so that the party will actually or by effect receive or control a portion of the benefit, profit or other consideration from performance of a vendor contract with the party receiving an amount that meets or exceeds five percent of the total contract amount.

AFFIRMATION: By signing this form, the vendor's authorized signer affirms and acknowledges under penalty of law for false swearing (W. Va. Code §61-5-3) that: (1) for construction contracts, the vendor is not in default on any monetary obligation owed to the state or a political subdivision of the state, and (2) for all other contracts, that neither vendor nor any related party owe a debt as defined above and that neither vendor nor any related party are in employer default as defined above, unless the debt or employer default is permitted under the exception above.

WITNESS THE FOLLOWING SIGNATURE:

Vendor's Name: Carahsoft Technology Corporation

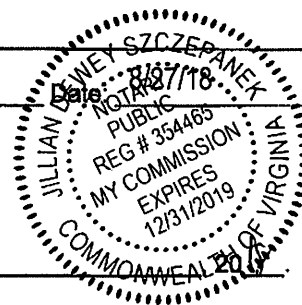
Authorized Signature: [Signature]

State of VA

County of FFX to-wit:

Taken, subscribed, and sworn to before me this 27 day of July

My Commission expires 12/31, 2019



AFFIX SEAL HERE

NOTARY PUBLIC [Signature]

CASE STUDIES

Please see the following pages for these case studies to see how DocuSign has helped improve other departments of transportation:

- Nevada Department of Transportation
- Washington Department of Transportation
- South Carolina Department of Transportation

Case Study: Nevada Department of Transportation



Government: State of Nevada

Sector: Department of Transportation

Population: 2.8MM citizens

Employees: 1800+

Budget: \$1.25B USD

Infrastructure: 5,400+ highway miles, 1000+ bridges

Website: www.nevadadot.org

Partner: DocuSign

DocuSign / Nevada Department of Transportation Initiative

Nevada DOT's Top Objectives

- Provide a better transportation system for Nevada through unified and dedicated efforts
- Accelerate the pace of business to improve efficiency for employees, contractors and constituents

The Resolution

- Replace paper-based documents with DocuSign's trusted Digital Transaction Management (DTM) platform

The Key Benefits

- Shortened disadvantaged business enterprise (DBE) procurement process from up to 6 months to under 2 weeks
- First state agency to meet legislative mandate to have all public-facing documents available online (SB236)
- Received 2014 Cashman Good Government Award from Nevada Taxpayers Association for use of DocuSign

10x

Acceleration In Contract Processing Time

90%

Reduction In DBE Procurement Process

"Using DocuSign, we're putting Nevadans to work faster, making government more user-friendly, and increasing transparency and efficiency." -Teresa Schlaffer, Business Process Analyst, Nevada



10x

Acceleration in contract processing time

100%

of public-facing documents available online

“We’ve seen the biggest win with mobile. Directors can be out of the office for several weeks at a time. Now they can sign while in the field.”

- Teresa Schlaffer



Case Study: Washington State Department of Transportation



Government: State of Washington
Sector: Department of Transportation
Population: 7.17M citizens
Employees: 6,318
Budget: \$5.132B USD
Infrastructure: 20,000 lane-miles of roadway, 3,000 vehicular bridges and 524 other structures
Website: www.wsdot.wa.gov
Partner: DocuSign

DocuSign / Washington State Department of Transportation

Washington State DOT's Top Objectives

- Provide the safest, most efficient and highest quality transportation services to best serve the needs of the state, its citizens, and visitors
- Accelerate the pace of business by improving efficiency of internal processes and approvals

The Resolution

- Replace paper-based engineering document approvals with DocuSign's trusted Digital Transaction Management (DTM) platform

The Key Benefits

- Saved up to \$150 in printing and shipping costs for Right of Way Plans
- Eliminated security gaps by documenting required signoffs for all engineering document changes
- No longer need to store thousands of signed physical flat files of large engineering documents

\$150

Maximum Saved Per Document Transaction

100%

Compliance With Signoff Requirements

"We don't have to store 36 x 24 mylars as flat files that take up a large room any longer. Now we have electronic legal copies and digital record keeping." - **Scott Soper, Emerging Technologies Coordinator, Washington State DOT**



\$150

Maximum saved
per transaction

100%

Compliance with sign-off
requirements

**“We don’t have to store 36 x 24
mylars as flat files that take up a
large room any longer. Now we
have electronic legal copies and
digital record keeping.”**

- Scott Soper, Emerging Technologies
Coordinator, Washington DOT



Case Study: South Carolina DOT



Government: State of South Carolina

Sector: Department of Transportation

Population: 4.8MM citizens

Budget: \$1.2B USD

Infrastructure: 41,000 miles of roadway, 8,340 bridges

Website: www.dot.state.sc.us

Partner: DocuSign

DocuSign / SC Department of Transportation Initiative

South Carolina DOT's Top Objectives

- Provide the citizens of South Carolina with a first class transportation system
- Accelerate the pace of business by improving efficiency of signing high volume engineering documents

The Resolution

- Replace paper-based engineering document approvals with DocuSign's trusted Digital Transaction Management (DTM) platform

The Key Benefits

- Significantly accelerated process of signing engineering documents, which can be over 100 pages long and require a signature on each page
- Expanded use into FTA Grant Management System which enables transit providers to submit and sign invoices, grant requests and inventory documents
- Seamlessly integrated within SharePoint environment

100%

Compliance With Signoff Requirements

"We chose DocuSign because they have a very good product. It integrated easily within our SharePoint environment, it is fully acceptable to our legal department, it can be validated by anyone anywhere, it scales easily, and it works well over our extranet and internet enabling employees and external consultants to sign multiple page documents." - Jose Valdivieso, Director of Software Development, IT Services Department, SCDOT



Seamless integration with
SharePoint environment

100%

Compliance with engineering
plan sign-off requirements

**“Our vision is to eliminate
physical paper documents
and the inherent risks that
accompany them.”**

- Jose Valdivieso, Director of
Software
Development, South Carolina
DOT

The logo for South Carolina Department of Transportation (SCDOT) is displayed in the bottom left corner. It features the letters 'SCDOT' in a bold, white, sans-serif font. The letter 'D' is stylized with a white outline and a horizontal line through its center, resembling a road or a bridge.

IN SUMMARY

Carahsoft Technology Corporation and DocuSign appreciate the opportunity to offer this solution for the West Virginia Department of Transportation's (DOT) initiative.

The Carahsoft Team has proposed a superior and cost-effective solution that fully complies with DOT's requirements set forth in the Solicitation. We understand the importance of your project goals, and we are confident you will benefit from this solution and our expertise.

Carahsoft looks forward to the opportunity to speak with you regarding the details of this proposal, as well as the opportunity to work with DOT on this project.