



West Virginia Purchasing Division

2019 Washington Street, East
Charleston, WV 25305
Telephone: 304-558-2306
General Fax: 304-558-6026
Bid Fax: 304-558-3970

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

List View

- General Information**
- Contact
- Default Values
- Discount
- Document Information
- Clarification Request

Procurement Folder: 1002137

Procurement Type: Central Master Agreement

Vendor ID:

Legal Name: CARAHSOFT TECHNOLOGY CORP

Alias/DBA:

Total Bid: \$330,168.00

Response Date:

Response Time:

Responded By User ID:

First Name:

Last Name:

Email:

Phone:

SO Doc Code: CRFQ

SO Dept: 0506

SO Doc ID: WIC2200000001

Published Date: 3/8/22

Close Date: 3/15/22

Close Time: 13:30

Status: Closed

Solicitation Description:

Total of Header Attachments: 1

Total of All Attachments: 1



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

**State of West Virginia
 Solicitation Response**

Proc Folder:	1002137	
Solicitation Description:	DIGITAL TRANSACTION MANAGEMENT AND ESIGNATURE SUBSCRIPTION	
Proc Type:	Central Master Agreement	
Solicitation Closes	Solicitation Response	Version
2022-03-15 13:30	SR 0506 ESR03152200000005618	1

VENDOR
000000195808 CARAHSOFT TECHNOLOGY CORP

Solicitation Number: CRFQ 0506 WIC2200000001

Total Bid: 330168 **Response Date:** 2022-03-15 **Response Time:** 09:10:35

Comments:

FOR INFORMATION CONTACT THE BUYER
 Crystal G Husted
 (304) 558-2402
 crystal.g.husted@wv.gov

Vendor Signature X	FEIN#	DATE
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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	Licenses Subscription (30,000 Annual Transactions)	1.00000	EA	70629.000000	70629.00

Comm Code	Manufacturer	Specification	Model #
81112217			

Commodity Line Comments:

Extended Description:

30,000 Annual Transactions or below

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
2	License Subscription (per ea.500 Transactions >30,000)	1.00000	EA	1177.000000	1177.00

Comm Code	Manufacturer	Specification	Model #
81112217			

Commodity Line Comments:

Extended Description:

License Subscription (per ea.500 Transactions >30,000)

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
3	Developing Templates, Workflow, Integration	20.00000	EA	250.000000	5000.00

Comm Code	Manufacturer	Specification	Model #
81112217			

Commodity Line Comments:

Extended Description:

Developing Templates, Workflow, Integration

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
4	General User Class - Online/instructor led (Unlimited)	50.00000	EA	0.000000	0.00

Comm Code	Manufacturer	Specification	Model #
81112217			

Commodity Line Comments: Complimentary. For more information, visit <https://docusign.my.salesforce.com/sfc/p/#300000000bS4/a/1W000000LYkp/Ngs72V9cq.Ah4Ps1F3X0DqCnPjxgP0Yg4CV768oxhPY>

Extended Description:

General User Class - Online/instructor led (Unlimited)

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
5	Administrator Class - Online/ instructor led (Unlimited)	30.00000	EA	900.000000	27000.00

Comm Code	Manufacturer	Specification	Model #
81112217			

Commodity Line Comments: <https://support.docusign.com/en/articles/campuspass>

Extended Description:

Administrator Class - Online/ instructor led (Unlimited)

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
6	Licenses Subscription (30,000 Annual Transactions) - Year 2	1.00000	EA	70629.000000	70629.00

Comm Code	Manufacturer	Specification	Model #
81112217			

Commodity Line Comments:

Extended Description:

30,000 Annual Transactions or below

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
7	Licenses Subscription (30,000 Annual Transactions) - Year 3	1.00000	EA	74160.000000	74160.00

Comm Code	Manufacturer	Specification	Model #
81112217			

Commodity Line Comments:

Extended Description:

30,000 Annual Transactions or below

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
8	Licenses Subscription (30,000 Annual Transactions) - Year 4	1.00000	EA	77868.000000	77868.00

Comm Code	Manufacturer	Specification	Model #
81112217			

Commodity Line Comments:

Extended Description:

30,000 Annual Transactions or below

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
9	License Subscription (per ea.500 Transactions >30,000) -YR2	1.00000	EA	1175.000000	1175.00

Comm Code	Manufacturer	Specification	Model #
81112217			

Commodity Line Comments:

Extended Description:

License Subscription (per ea.500 Transactions >30,000) -YR2

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
10	License Subscription (per ea.500 Transactions >30,000) - YR3	1.00000	EA	1234.000000	1234.00

Comm Code	Manufacturer	Specification	Model #
81112217			

Commodity Line Comments:

Extended Description:

License Subscription (per ea.500 Transactions >30,000) - YR3

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
11	License Subscription (per ea.500 Transactions >30,000) - YR4	1.00000	EA	1296.000000	1296.00

Comm Code	Manufacturer	Specification	Model #
81112217			

Commodity Line Comments:

Extended Description:

License Subscription (per ea.500 Transactions >30,000) - YR4

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
12	Developing Templates, Workflow, Integration - YR 2	20.00000	EA	0.000000	0.00

Comm Code	Manufacturer	Specification	Model #
81112217			

Commodity Line Comments:

Extended Description:

Developing Templates, Workflow, Integration - YR 2

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
13	Developing Templates, Workflow, Integration - YR3	20.00000	EA	0.000000	0.00

Comm Code	Manufacturer	Specification	Model #
81112217			

Commodity Line Comments:

Extended Description:

Developing Templates, Workflow, Integration - YR3

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
14	Developing Templates, Workflow, Integration - YR4	20.00000	EA	0.000000	0.00

Comm Code	Manufacturer	Specification	Model #
81112217			

Commodity Line Comments:

Extended Description:

Developing Templates, Workflow, Integration - YR4

carahsoft[®]

Carahsoft's Response to the

State of West Virginia

**Department of Administration, Purchasing Division
on behalf of the West Virginia Department of Health and Human
Resources (DHHR), Bureau for Public Health (BPH), Office of
Nutrition Services (ONS)**

Request for Quotation

Digital Transaction Management and eSignature Subscription

Solicitation Number: CRFQ 0506 WIC2200000001

Tuesday,
March 15, 2021

Solution Provided By

DocuSign[®]

Carahsoft Technology Corp.
11493 Sunset Hills Road, Suite 100
Reston, VA 20190

888.662.2724 | www.carahsoft.com

March 15, 2021

State of West Virginia
Department of Administration
Purchasing Division
2019 Washington Ste
Charleston, WV 25305

Re: Carahsoft's Response to the State of West Virginia's Request for Quotation: Digital Transaction Management and eSignature Subscription, Solicitation Number: CRFQ 0506 WIC220000001

Dear Crystal G. Husted,

Carahsoft Technology Corp. appreciates the opportunity to respond to the State of West Virginia Purchasing Division (the State)'s, on behalf of the West Virginia Department of Health and Human Resources (DHHR), Bureau for Public Health (BPH), Office of Nutrition Services (ONS), Request for Quotation (RFQ): Digital Transaction Management and eSignature Subscription. Carahsoft is proposing DocuSign which fully meets the State's requirements. Our team has reviewed and considered the State's requirements outlined in the RFQ, and has carefully put together a solution that will best meet your needs.

Carahsoft has built our reputation as a customer-centric organization dedicated to serving the needs of our technology manufacturers, government end users, and reseller ecosystem with Solutions for Government®. Carahsoft is submitting as the IT Schedule 70 GSA Contract holder (GS-35F-0119Y) and reseller for **DocuSign**. As a Master Government Aggregator™ and top ranked GSA Schedule holder, Carahsoft has combined extensive knowledge of the technologies we provide with a thorough understanding of the government procurement process, to analyze needs, provide configuration support, simplify the ordering process, and offer special government pricing since 2004.

Please feel free to contact me directly at 571.662.3432/Tony.Striner@carahsoft.com or Jacob Holler at 703.581.6581/Jacob.Holler@carahsoft.com with any questions or communications that will assist the State in the evaluation of our response. This proposal is valid for 90 days from the date of submission.

Thank you for your time and consideration.

Sincerely,



Tony Striner
Account Representative

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EXECUTIVE SUMMARY

Prime Contractor: Carahsoft Technology Corp.

Carahsoft Technology Corp. is The Trusted Government IT Solutions Provider®, supporting Public Sector organizations across Federal, State and Local Government agencies and Education and Healthcare markets. As the Master Government Aggregator® for our vendor partners, we deliver solutions for Cybersecurity, MultiCloud, DevSecOps, Big Data, Artificial Intelligence, Open Source, Customer Experience and more. Working with resellers, systems integrators and consultants, our sales and marketing teams provide industry leading IT products, services and training through hundreds of contracts. Founded in 2004, Carahsoft is headquartered in Reston, Virginia and employs more than 1,900 professionals dedicated to serving our public sector customers and partners.

Vendor and Partner Relationships – In addition to establishing strategic, long-term relationships with the industry’s leading manufacturers, our partner ecosystem encompasses more than 3,000+ government contractors, resellers, and integrators who we support and enable with an entire suite of value-added opportunities that run the gamut from training/certification and pre-sales support to lead generation and business development.

Proven Execution – Carahsoft has deep expertise in government contracting and procurement, and has been awarded and maintain a wide variety of government-wide and agency-specific purchasing contract vehicles and purchasing agreements for agencies at the state, local, and federal levels. As a result, we now serve as the largest government partner for the majority of our vendors, who have also entrusted other major aspects of their businesses to Carahsoft including partner enablement, commercial sales, renewals and upsell, and help desk services.

Contract Vehicles – Since 2004, Carahsoft has acquired and maintained a wide variety of purchasing contract vehicles for agencies at all levels of government. 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 – A stable, conservative, and profitable company, Carahsoft has demonstrated impressive growth year after year, with annual revenue of \$3.4 million in our first year in 2004 to \$8.1 billion in 2020. In September of 2020 our team of dedicated, highly trained marketing, sales, contracting and business operations experts processed 14,944 orders worth nearly \$1.6 billion.

Awards and Industry Recognition – Carahsoft receives awards for our excellent performance yearly. For more information on the hundreds of awards we have received please visit our website at <https://www.carahsoft.com/awards>.



Solution Provider: DocuSign

Since its inception in 2003, DocuSign has been on a mission to accelerate business and simplify life for companies and people around the world. DocuSign's vision is to streamline the agreement process, to prepare, sign, act upon and manage any document or agreement on practically any device, from almost anywhere, at any time. To realize this vision, we will work to enable Agreement Cloud functionality on every software interface and application in the world. This initiative includes business systems, productivity applications, email interfaces, mobile phones, tablets, and more. Executing this vision would create a network of tremendous value to DocuSign, our customers, their constituents, as well as our respective partners. *Our value is simple to understand.* The traditional, paper-based agreement process is manual, slow, expensive, and error-prone. We eliminate the paper and automate the process, allowing companies to measure turnaround time in minutes rather than days, substantially reduce costs, and largely eliminate errors.

DocuSign is changing how business gets done by empowering more than 1 million customers and more than 1 billion users in over 180 countries to prepare, sign, act upon, and manage documents on practically any device, from almost anywhere, at any time, with confidence. DocuSign is the easiest, fastest, and most trusted way to digitize every approval and decision. Organizations of all sizes and industries accelerate contracts, approvals, and workflows with the DocuSign Agreement Cloud solution.

The DocuSign Agreement Cloud helps companies keep processes 100% digital from start to finish to accelerate transactions, reduce costs, and satisfy customers, partners, suppliers, and employees. Global enterprises, business departments, individual professionals, and consumers have all standardized on DocuSign. With localization in 44 languages, DocuSign's Agreement Cloud solution supports legally compliant electronic and digital signature processes tailored to meet global requirements.



Companies and individuals use DocuSign to shorten transaction times to increase speed to results, reduce costs, increase security and compliance, and delight customers across nearly every industry, from healthcare/life sciences, financial services, insurance, technology, healthcare, manufacturing, food & beverage, communications, real estate, retail, and consumer goods to higher education, non-profit and others, as well as every business department, including sales, finance, operations, procurement, HR/staffing, legal, and customer support.

DocuSign Facts

DocuSign Is Used by:

- More than 1 billion users in over 180 countries
- Over 4,500 public sector agencies at the federal, state, county, and municipal level in all 50 states
 - eSignature and CLM are both authorized at the FedRAMP Moderate Impact Level
- 15 of the top 15 Fortune 500 Financial companies
- 14 of the top 15 Fortune 500 Healthcare companies
- 13 of the top 15 Fortune 500 Technology companies
- 10 of the top 10 US private and public education institutions

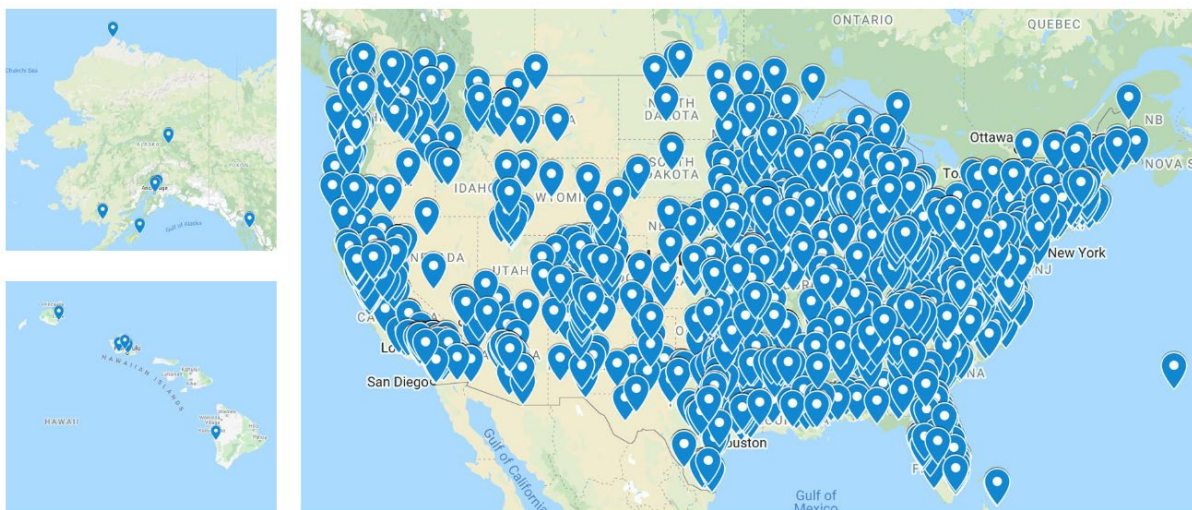
DocuSign's Public Sector Experience

For over 18 years, DocuSign has delivered electronic signature and Agreement Cloud solutions. With over 1 million customers worldwide and the leading market share, DocuSign is not only the leader but also the industry standard for eSignature technology and the agreement cloud space. As shown below, DocuSign's expertise in the government marketplace is broad and deep.

Public Sector is embracing DocuSign

4,500 federal, state, county, and municipal organizations use DocuSign across all 50 states.

The Public Sector Trusts DocuSign



Over **4,500** Federal, City, County, and Municipal Organizations in all **50** states.

State Government Organizations Trust DocuSign



Benefits of DocuSign's Solution

Public Sector Compliance

DocuSign supports the Public Sector 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 **Section 508** and **WCAG 2.0 Level AA** compliant
- DocuSign is certified to all optional and mandatory **ISO 27001** controls

Scalability

DocuSign is the only enterprise-grade solution provider. With over 1 million customers and more than 1 billion users in over 180 countries, DocuSign is the leader in product capabilities and support. DocuSign's 7,056+ employees are all dedicated to the DocuSign Agreement Cloud. No other provider even comes close.

DocuSign supports a platform architecture with 10 geo-dispersed data centers geographically dispersed across the globe. DocuSign is the only vendor that uses a category-leading platform architecture with no downtime. If ONS is considering an enterprise-wide deployment in a complicated environment with multiple use cases within and outside of your company, only the industry leader will do. DocuSign is the only Agreement Cloud vendor whose customers are empowered to use hundreds of use cases across their organization with our unique capabilities for a complete digital transformation. Our over 350 pre-built partner integrations extend these capabilities further, so ONS can use DocuSign in a way it fits your business - not the other way around.

DocuSign Delivers Customer Success

By choosing DocuSign, you're choosing the best partner to drive your success. With over 1,500 employees dedicated to customer support and success, DocuSign has invested more in customer success than any other company. DocuSign customers get a wide range of industry-leading resources to help them succeed, including Advisory, Implementation, and Adoption Services. DocuSign's unparalleled offering of 24/7 live global support, a wealth of online resources, [DocuSign University](#), and more is why customers most often choose and stay with DocuSign.

The DocuSign Account Team typically consists of an Account Executive/Director, Renewal Manager, and Engagement Manager. The Account Executive/Director stands as the primary relationship owner and main point of contact with DocuSign. The Renewal Manager is a contract expert focused on securing future commitments based on mutual outcomes, and the Engagement Manager is dedicated to a seamless and transparent implementation. All members of the Account Team are dedicated to delivering a customized customer experience by offering expanded capabilities and the right expertise, at the right time.

We also offer a Customer Support Manager (CSM) who is dedicated to adoption management, stakeholder alignment, and value realization. Accounts that have a specific spend with DocuSign (variable by region) will be provided with a dedicated CSM. This individual will become a critical part of the DocuSign Account Team and drove adoption motions through joint success planning with the customer.

All members of the Account Team are dedicated to delivering a customized customer experience by offering expanded capabilities and the right expertise, at the right time. While others may claim that they provide similar services, DocuSign is unique in providing dedicated account management and value realization teams. Additionally, DocuSign provides business customers with multiple methods of support, including chat, phone, and email, a benefit not offered by our competitors.

Largest Ecosystem of Partners and Integrations

DocuSign is the only electronic signature provider with strategic partnerships with Microsoft, Salesforce, Google, Apple, SAP, and IBM, among others. With the largest partner ecosystem in the industry, many times larger than any other vendor. Our partner ecosystem helps customers like ONS make the most out of their existing infrastructure, reducing costs, improving time to value, and increasing process efficiencies. Our over 350 pre-built partner integrations encompass a variety of industries and use cases, as well as pre-built connectors with solutions from vendors such as Ariba, Google, Microsoft, NetSuite, Salesforce, and SugarCRM, all of which can be seen in our [Solution Showcase](#). If a connector doesn't exist, customers can utilize the DocuSign Developer Center, which already has over 200,000 developers using our open APIs. Customers can also leverage [The DocuSign Partner Directory](#) for a certified DocuSign consulting partner to deploy DocuSign or build custom solutions.

CRFQ FORM

Please see the following pages for our completed CRFQ Form.



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

State of West Virginia
 Centralized Request for Quote
 Info Technology

Proc Folder: 1002137			Reason for Modification: ADDENDUM 1 TO CORRECT INSURANCE REQUIREMENTS
Doc Description: DIGITAL TRANSACTION MANAGEMENT AND ESIGNATURE SUBSCRIPTION			
Proc Type: Central Master Agreement			
Date Issued	Solicitation Closes	Solicitation No	Version
2022-03-08	2022-03-15 13:30	CRFQ 0506 WIC2200000001	2

BID RECEIVING LOCATION

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

VENDOR

Vendor Customer Code: 000000195808

Vendor Name : Carahsoft Technology Corporation

Address :

Street : 11493 Sunset Hills Road, Suite 100


City : Reston

State : VA **Country :** USA **Zip :** 20190

Principal Contact : Tony Striner

Vendor Contact Phone: 571.662.3432 **Extension:** N/A

FOR INFORMATION CONTACT THE BUYER
 Crystal G Hustead
 (304) 558-2402
 crystal.g.hustead@wv.gov

Vendor Signature X  **FEIN#** 52-2189693 **DATE** 3/14/22

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 DEPARTMENT OF HEALTH AND HUMAN RESOURCES, OFFICE OF NUTRITION SERVICES, IS SOLICITING BIDS TO ESTABLISH AN OPEN-END CONTRACT FOR DIGITAL TRANSACTION MANAGEMENT AND E-SIGNATURE SUBSCRIPTION PER THE ATTACHED DOCUMENTS.

QUESTIONS REGARDING THE SOLICITATION MUST BE SUBMITTED IN WRITING TO CRYSTAL.G.HUSTEAD@WV.GOV PRIOR TO THE QUESTION PERIOD DEADLINE CONTAINED IN THE INSTRUCTIONS TO VENDORS SUBMITTING BIDS

INVOICE TO			SHIP TO		
HEALTH AND HUMAN RESOURCES			HEALTH AND HUMAN RESOURCES		
BPH - NUTRITION SERVICES			BPH - NUTRITION SERVICES		
350 CAPITOL ST, RM 519			350 CAPITOL ST, RM 519		
CHARLESTON	WV		CHARLESTON	WV	
US			US		

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
1	Licenses Subscription (30,000 Annual Transactions)	1.00000	EA	\$70,629	\$70,629

Comm Code	Manufacturer	Specification	Model #
81112217			

Extended Description:
30,000 Annual Transactions or below

INVOICE TO			SHIP TO		
HEALTH AND HUMAN RESOURCES			HEALTH AND HUMAN RESOURCES		
BPH - NUTRITION SERVICES			BPH - NUTRITION SERVICES		
350 CAPITOL ST, RM 519			350 CAPITOL ST, RM 519		
CHARLESTON	WV		CHARLESTON	WV	
US			US		

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
2	License Subscription (per ea.500 Transactions >30,000)	1.00000	EA	\$1,177	\$1,177

Comm Code	Manufacturer	Specification	Model #
81112217			

Extended Description:
License Subscription (per ea.500 Transactions >30,000)

INVOICE TO			SHIP TO		
HEALTH AND HUMAN RESOURCES BPH - NUTRITION SERVICES 350 CAPITOL ST, RM 519 CHARLESTON WV US			HEALTH AND HUMAN RESOURCES BPH - NUTRITION SERVICES 350 CAPITOL ST, RM 519 CHARLESTON WV US		

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
3	Developing Templates, Workflow, Integration	20.00000	EA	\$250	\$5,000

Comm Code	Manufacturer	Specification	Model #
81112217			

Extended Description:
Developing Templates, Workflow, Integration

INVOICE TO			SHIP TO		
HEALTH AND HUMAN RESOURCES BPH - NUTRITION SERVICES 350 CAPITOL ST, RM 519 CHARLESTON WV US			HEALTH AND HUMAN RESOURCES BPH - NUTRITION SERVICES 350 CAPITOL ST, RM 519 CHARLESTON WV US		

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
4	General User Class - Online/instructor led (Unlimited)	50.00000	EA	Complimentary	Complimentary

Comm Code	Manufacturer	Specification	Model #
81112217			

Extended Description:
General User Class - Online/instructor led (Unlimited)
<https://docusign.my.salesforce.com/sfc/p/#300000000bS4/a/1W000000LYkp/Ngs72V9cq.Ah4Ps1F3X0DqCnPjxgP0Yg4CV768oxhPY>

INVOICE TO			SHIP TO		
HEALTH AND HUMAN RESOURCES BPH - NUTRITION SERVICES 350 CAPITOL ST, RM 519 CHARLESTON WV US			HEALTH AND HUMAN RESOURCES BPH - NUTRITION SERVICES 350 CAPITOL ST, RM 519 CHARLESTON WV US		

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
5	Administrator Class - Online/ instructor led (Unlimited)	30.00000	EA	\$900	\$27,000

Comm Code	Manufacturer	Specification	Model #
81112217			

Extended Description: <https://support.docusign.com/en/articles/campuspass>
Administrator Class - Online/ instructor led (Unlimited)

INVOICE TO			SHIP TO		
HEALTH AND HUMAN RESOURCES BPH - NUTRITION SERVICES 350 CAPITOL ST, RM 519 CHARLESTON WV US			HEALTH AND HUMAN RESOURCES BPH - NUTRITION SERVICES 350 CAPITOL ST, RM 519 CHARLESTON WV US		

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
6	Licenses Subscription (30,000 Annual Transactions) - Year 2	1.00000	EA	\$70,629	\$70,629

Comm Code	Manufacturer	Specification	Model #
81112217			

Extended Description:
30,000 Annual Transactions or below

INVOICE TO			SHIP TO		
HEALTH AND HUMAN RESOURCES BPH - NUTRITION SERVICES 350 CAPITOL ST, RM 519 CHARLESTON WV US			HEALTH AND HUMAN RESOURCES BPH - NUTRITION SERVICES 350 CAPITOL ST, RM 519 CHARLESTON WV US		

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
7	Licenses Subscription (30,000 Annual Transactions) - Year 3	1.00000	EA	\$74,160	\$74,160

Comm Code	Manufacturer	Specification	Model #
81112217			

Extended Description:
30,000 Annual Transactions or below

INVOICE TO			SHIP TO		
HEALTH AND HUMAN RESOURCES BPH - NUTRITION SERVICES 350 CAPITOL ST, RM 519 CHARLESTON WV US			HEALTH AND HUMAN RESOURCES BPH - NUTRITION SERVICES 350 CAPITOL ST, RM 519 CHARLESTON WV US		

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
8	Licenses Subscription (30,000 Annual Transactions) - Year 4	1.00000	EA	\$77,868	\$77,868

Comm Code	Manufacturer	Specification	Model #
81112217			

Extended Description:
30,000 Annual Transactions or below

INVOICE TO			SHIP TO		
HEALTH AND HUMAN RESOURCES BPH - NUTRITION SERVICES 350 CAPITOL ST, RM 519 CHARLESTON WV US			HEALTH AND HUMAN RESOURCES BPH - NUTRITION SERVICES 350 CAPITOL ST, RM 519 CHARLESTON WV US		

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
9	License Subscription (per ea.500 Transactions >30,000) -YR2	1.00000	EA	\$1,175	\$1,175

Comm Code	Manufacturer	Specification	Model #
81112217			

Extended Description:
License Subscription (per ea.500 Transactions >30,000) -YR2

INVOICE TO			SHIP TO		
HEALTH AND HUMAN RESOURCES BPH - NUTRITION SERVICES 350 CAPITOL ST, RM 519 CHARLESTON WV US			HEALTH AND HUMAN RESOURCES BPH - NUTRITION SERVICES 350 CAPITOL ST, RM 519 CHARLESTON WV US		

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
10	License Subscription (per ea.500 Transactions >30,000) - YR3	1.00000	EA	\$1,234	\$1,234

Comm Code	Manufacturer	Specification	Model #
81112217			

Extended Description:
License Subscription (per ea.500 Transactions >30,000) - YR3

INVOICE TO			SHIP TO		
HEALTH AND HUMAN RESOURCES BPH - NUTRITION SERVICES 350 CAPITOL ST, RM 519 CHARLESTON WV US			HEALTH AND HUMAN RESOURCES BPH - NUTRITION SERVICES 350 CAPITOL ST, RM 519 CHARLESTON WV US		

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
11	License Subscription (per ea.500 Transactions >30,000) - YR4	1.00000	EA	\$1,296	\$1,296

Comm Code	Manufacturer	Specification	Model #
81112217			

Extended Description:
License Subscription (per ea.500 Transactions >30,000) - YR4

INVOICE TO			SHIP TO		
HEALTH AND HUMAN RESOURCES BPH - NUTRITION SERVICES 350 CAPITOL ST, RM 519 CHARLESTON WV US			HEALTH AND HUMAN RESOURCES BPH - NUTRITION SERVICES 350 CAPITOL ST, RM 519 CHARLESTON WV US		

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
12	Developing Templates, Workflow, Integration - YR 2	20.00000	EA	\$0	\$0

Comm Code	Manufacturer	Specification	Model #
81112217			

Extended Description:
Developing Templates, Workflow, Integration - YR 2

INVOICE TO			SHIP TO		
HEALTH AND HUMAN RESOURCES BPH - NUTRITION SERVICES 350 CAPITOL ST, RM 519 CHARLESTON WV US			HEALTH AND HUMAN RESOURCES BPH - NUTRITION SERVICES 350 CAPITOL ST, RM 519 CHARLESTON WV US		

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
13	Developing Templates, Workflow, Integration - YR3	20.00000	EA	\$0	\$0

Comm Code	Manufacturer	Specification	Model #
81112217			

Extended Description:
Developing Templates, Workflow, Integration - YR3

INVOICE TO			SHIP TO		
HEALTH AND HUMAN RESOURCES BPH - NUTRITION SERVICES 350 CAPITOL ST, RM 519 CHARLESTON WV US			HEALTH AND HUMAN RESOURCES BPH - NUTRITION SERVICES 350 CAPITOL ST, RM 519 CHARLESTON WV US		

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
14	Developing Templates, Workflow, Integration - YR4	20.00000	EA	\$0	\$0

Comm Code	Manufacturer	Specification	Model #
81112217			

Extended Description:
Developing Templates, Workflow, Integration - YR4


SCHEDULE OF EVENTS

Line	Event	Event Date
1	VENDOR QUESTION DEADLINE	2022-03-07

DESIGNATED CONTACT FORM

Please see the following page for our completed Designated Contact 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.



(Name, Title)
Tony Striner, Account Representative

(Printed Name and Title)
11493 Sunset Hills Road, Suite 100, Reston, VA 20190

(Address)
571.662.3432 / 703.871.8505

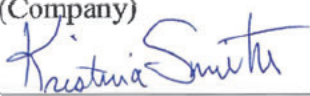
(Phone Number) / (Fax Number)
Tony.Striner@Carahsoft.com

(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.

By signing below, I further certify that I understand this Contract is subject to the provisions of West Virginia Code § 5A-3-62, which automatically voids certain contract clauses that violate State law.

Carahsoft Technology Corporation

(Company)
 Kristina Smith, Contracts Director

(Authorized Signature) (Representative Name, Title)

Kristina Smith, Contracts Director

(Printed Name and Title of Authorized Representative)

3/14/22

(Date)

703.871.8503 / 703.871.8505

(Phone Number) (Fax Number)

ADDENDUM ACKNOWLEDGEMENT

Please see the following page for our completed Addendum Acknowledgement.

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: CRFQ WIC220000001

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

3/14/22

Date

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

DISCLOSURE OF INTERESTED PARTIES FORM

Please see the following page for our completed Disclosure of Interested Parties Form.

West Virginia Ethics Commission
Disclosure of Interested Parties to Contracts

(Required by W. Va. Code § 6D-1-2)

Carahsoft Technology

Name of Contracting Business Entity: Corporation Address: 11493 Sunset Hills Road, Suite 100
Reston, VA 20190

Name of Authorized Agent: Kristina Smith Address: 11493 Sunset Hills Road, Suite 100, Reston, VA 20190

Contract Number: CRFQ WIC2200000001 Contract Description: Digital Transaction Management and eSignature Subscription

Governmental agency awarding contract: Department of Administration, Purchasing Division

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.

Carahsoft Technology Corporation is owned in whole by Carahsoft, Inc., which is owned entirely by Craig P. Abod.

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: 3/14/22

Notary Verification

State of Virginia, County of Fairfax:

I, Kristina Smith, 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 14th day of March, 2022
Elise B. Roell
Electronic Notary Public
Commonwealth of Virginia
Notary Expiration #: 7/31/2023
Notary Registration #: 7052639 Digitally signed by Elise B. Roell
Date: 2022.03.14 09:29:30 -04'00'

To be completed by State Agency:

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

Notary Public's Signature

PURCHASING AFFIDAVIT

Please see the following page for our completed 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:  Date: 3/14/22

State of Virginia

County of Fairfax, to-wit:

Taken, subscribed, and sworn to before me this 14 day of March, 2022.


My Commission expires 07/31, 2023.

AFFIX SEAL HERE

Elise B. Roell
Electronic Notary Public
Commonwealth of Virginia
Notary Expiration #: 7/31/2023
Notary Registration #: 7852639

Digitally signed
by Elise B Roell
Date:
2022.03.14
09:29:46 -04'00'

NOTARY PUBLIC



Purchasing Affidavit (Revised 01/19/2018)

SPECIFICATIONS

3. GENERAL REQUIREMENTS

3.1. *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.*

3.1.1 General

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

From sales contracts and offer letters to account openings and invoices, agreements are everywhere. With DocuSign eSignature, you have the ability to complete contracts, approvals, and other agreements in minutes rather than days. And because it's part of the DocuSign Agreement Cloud, you can extend these benefits to other stages of the agreement process, such as preparing, acting on, and managing agreements.

DocuSign eSignature Benefits:

DocuSign eSignature accelerates agreements, eliminates manual tasks, and makes it easy to connect with the tools and systems you're already using.

- **Do business faster:** Send and sign agreements securely from virtually any device. On average, 80% of agreements are completed in less than 24 hours, and 44% within 15 minutes.
- **Be more efficient:** DocuSign eSignature eliminates manual tasks and increases convenience for your customers and employees.
- **Save money:** DocuSign eSignature saves an average of \$36 per agreement by reducing hard costs and improving employee productivity.

Sign your agreements quickly and securely. Complete the process faster with automated routing, signer identification, and legally enforceable capture of signatures. Partner options include additional methods of signer verification, for countries and industries with specialized requirements.

- **eSignature:** Send, sign, and succeed with the world's #1 electronic signature product.
- **Identify:** Choose from several enhanced ID options, including verifying government-issued IDs.
- **Standards Based Signatures:** Support certificate-based signing, including eIDAS, AES, and QES.
- **Click:** Capture consent to standard agreement terms with a single click.
- **eNotary:** Notarize electronically, in conjunction with an electronic signature.
- **Hybrid Cloud Appliances:** Deploy DocuSign eSignature in your data center

Features of DocuSign eSignature

- **Sign from anywhere:** Our highly-rated mobile apps for iOS, Android, and Windows let you work on the go—even when you don't have internet access.
- **Instant status visibility:** Always know where your agreement is in the signing process. Set automatic reminders and receive notifications at every step.

- **Collect the details you need:** Add standard fields to your agreement like a signature or date, or create and save custom fields.
- **Support for 44 languages:** DocuSign offers users the ability to sign documents in 44 localized languages and to send in 14.
- **Reusable Templates:** Save time and standardize processes by storing frequently used agreements along with their custom fields, recipient routing, and other settings.
- **over 350 pre-built partner integrations, leading APIs:** Integrate and connect eSignature with the systems and tools you already use.
- **Highly Secure:** DocuSign meets some of the most stringent US, EU, and global security standards, and uses the strongest data encryption technologies available.
- **Industry Leading Availability:** DocuSign's eSignature infrastructure has enabled us to deliver over 99.99% platform availability worldwide for the last year.
- **Lawful and court-admissible:** DocuSign eSignature complies with the US E-SIGN Act and UETA, as well as the EU eIDAS Regulation. We automatically generate and store a robust audit trail for every agreement.

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.

DocuSign requires more information from ONS regarding your definition of "electronic signature." Electronic signature or eSignature is a broad category into which all electronic signatures fall. Digital signatures are a specific type of signature technology implementation of electronic signature.

Organizations typically refer to eSignature as the process a person goes through to demonstrate their intent during an electronic transaction. Digital signature refers to the encryption technology containing critical metadata pertaining to the eSignature. The eSignature is the legally enforceable record while the digital signature is the underlying technology that helps to verify the authenticity of the transaction.

When referring to the process of electronically signing a document, it is recommended that the terms 'electronic signature' or 'eSignature' are used. 'Digital signature' should only be used when specifically referencing eSignatures made using digital certificate technology.

DocuSign meets legal and compliance requirements for both Electronic *and* Digital signatures both in the United States and internationally. In our experience, electronic signatures are sufficient for most use cases in North America and other common law countries; however, digital signatures are available where they are required. This topic is best addressed in further discussion and presentation of solutions between DocuSign and ONS with guidance from your decision-makers and what their legal teams require.

For more information and FAQs on the differences between electronic and digital signatures, please see: <https://www.docusign.com/how-it-works/electronic-signature/digital-signature/digital-signature-faq>

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:*

<http://www.wvlegislature.gov/WVCODE/Code.cfm?cha p=39a&art=3>

<http://www.wvlegislature.gov/WVCODE/Code.cfm?cha p=39a&art=1>

DocuSign requires more information from ONS regarding your definition of "electronic signature." Electronic signature or eSignature is a broad category into which all electronic signatures fall. Digital signatures are a specific type of signature technology implementation of electronic signature.

Organizations typically refer to eSignature as the process a person goes through to demonstrate their intent during an electronic transaction. Digital signature refers to the encryption technology containing critical metadata pertaining to the eSignature. The eSignature is the legally enforceable record while the digital signature is the underlying technology that helps to verify the authenticity of the transaction.

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DocuSign meets legal and compliance requirements for both Electronic *and* Digital signatures both in the United States and internationally. In our experience, electronic signatures are sufficient for most use cases in North America and other common law countries; however, digital signatures are available where they are required. This topic is best addressed in further discussion and presentation of solutions between DocuSign and ONS with guidance from your decision-makers and what their legal teams require.

For more information and FAQs on the differences between electronic and digital signatures, please see: <https://www.docusign.com/how-it-works/electronic-signature/digital-signature/digital-signature-faq>

3.1.2 Forms

Form elements shall include:

3.1.2.1 *The ability to use formula fields to make calculations that can be automated based on conditions.*

Yes, 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).

3.1.2.2 *Signature and Optional Signatures*

Yes, DocuSign supports signature fields and allows them to be made optional.

3.1.2.3 Initials and Optional Initials

An Initial Tag is used for recipients to initial areas of documents. The execution of initials is the same as the signature. The initial tag can be required or made optional. The first time a signer clicks on an initial tag, they are asked to adopt their initials.

3.1.2.4 Data Fields

The Text field (or data field) 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 and select the field on your document. In the field properties pane, expand the Validation section, click the drop down, and select the validation format for the field.

3.1.2.5 Radio Buttons

Yes, DocuSign supports 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".
- The Radio Button Values are not visible to the recipient, but the value for the selected response is included when you download form data for the document.
- Radio buttons, as a group, can be required or optional. If you set the Required Field property, your recipient must select one of the options to complete the document. If you have a scenario where your recipient must mark to indicate explicit agreement, use a single radio button and select the Required Field option.

3.1.2.6 Drop-Down Lists

Yes, DocuSign drop-down tags give your recipient a list of options they can select. Drop down lists can be required or optional.

3.1.3 Mobility

Web, Mobile Applications, and Integrations

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 mobile 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 practically any 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 are available for iOS and Android.

With DocuSign's Mobile Apps:

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

Offline Mobile Capabilities: DocuSign is the only vendor that supports the following features when the device does not have internet access.

- In-person signing
- Create an envelope
- Add a document
- Add in-person signer
- Add a remote signer
- Local document storage
- Enable offline mode

Please note: If users access DocuSign using Mobile Web, the user experience will display a message encouraging them to download the Mobile App, which has a more seamless interface. If users disregard this notification by closing it, they will remain where they were in their 'in-progress envelope' on Mobile Web. If they click 'Continue on Web,' the experience will take them to the Prepare page. If users elect to click on the App Store icon, it will direct them to the App Store via a built-in link to the DocuSign native app.

3.1.3.1 Supported Mobile Operating Systems shall include:

3.1.3.1.1 Apple iOS 7.0 and above

3.1.3.1.2 Android 4.0 and above

3.1.3.1.3 Microsoft Windows 10 and above

DocuSign doesn't have any device/browser/OS limitations. See below for the minimum system requirements needed to sign with DocuSign.

Authorized User (Sender) Requirements

- **Browsers:** Latest stable release (except where noted) of Windows Edge, Mozilla Firefox, Safari, and Google Chrome. Pre-release (e.g., beta) versions of operating systems and browsers are not supported.
- **Mobile Applications:** Apple iOS 8.0 and above, Android 4.0 and above
- **Mobile Web Sending:** Apple iOS 6.0 and above, Android 2.3 or above.
- **Screen Resolution:** 1024 x 768 minimum
- **Enabled Security Settings:** Allow per-session cookies. Users accessing the internet behind a Proxy Server must enable HTTP 1.1 settings via the proxy connection.

Recipient (Signer) Requirements

Reviewing and electronically signing documents within the Subscription Service requires the following minimum hardware and software requirements:

- **Browsers:** Latest stable release (except where noted) of Windows Edge, Mozilla Firefox, Safari, and Google Chrome. Pre-release (e.g., beta) versions of operating systems and browsers are not supported.
- **Mobile Web Signing:** Apple iOS 7.0 or above, Android 4.0 or above
- **Mobile Applications:** Apple iOS 8.0 and above, Android 4.0 and above
- **PDF Reader:** PDF reader software may be required to view and print PDF files
- DocuSign supports final release versions of Microsoft Edge, Mozilla Firefox 3.0 or above (Windows and Mac), Safari 3.0 or above (Mac OS only), and Google Chrome 5.0 (Windows and Mac). Although other browsers are not officially supported, signing typically works on any application that can render HTML. HTML5 is not required to sign but is leveraged for a few optional features such as drawn signatures and location services.

Most importantly, the experience is seamless to users whether they are using a computer, phone, or tablet. It's a comparable experience for the end-user.

Please see <https://support.docusign.com/en/guides/signer-guide-signing-system-requirements> for more information.

3.1.3.2 Supported Internet browser environments shall include:

3.1.3.2.1 Internet Explorer (Windows) 11 and above

3.1.3.2.2 Google Chrome (Windows, iOS and Android) 90 and above

3.1.3.2.3 FireFox

3.1.3.2.4 Safari

3.1.3.2.5 Windows Edge

3.1.3.2.6 Microsoft Edge

DocuSign doesn't have any device/browser/OS limitations. See below for the minimum system requirements needed to sign with DocuSign.

Authorized User (Sender) Requirements

- **Browsers:** Latest stable release (except where noted) of Windows Edge, Mozilla Firefox, Safari, and Google Chrome. Pre-release (e.g., beta) versions of operating systems and browsers are not supported.
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- **Screen Resolution:** 1024 x 768 minimum
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- **Mobile Web Signing:** Apple iOS 7.0 or above, Android 4.0 or above
- **Mobile Applications:** Apple iOS 8.0 and above, Android 4.0 and above
- **PDF Reader:** PDF reader software may be required to view and print PDF files
- DocuSign supports final release versions of Microsoft Edge, Mozilla Firefox 3.0 or above (Windows and Mac), Safari 3.0 or above (Mac OS only), and Google Chrome 5.0 (Windows and Mac). Although other browsers are not officially supported, signing typically works on any application that can render HTML. HTML5 is not required to sign but is leveraged for a few optional features such as drawn signatures and location services.

Most importantly, the experience is seamless to users whether they are using a computer, phone, or tablet. It's a comparable experience for the end-user.

Please see <https://support.docusign.com/en/guides/signer-guide-signing-system-requirements> for more information.

3.1.3.3 Signing application shall be available free and available for download.

Yes, DocuSign's application is free to download and use for all platforms.

3.1.3.4 *Signing application shall include the following mobile functionality:*

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 mobile 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 practically any 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 are available for iOS and Android.

With DocuSign’s Mobile Apps:

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

Offline Mobile Capabilities: DocuSign is the only vendor that supports the following features when the device does not have internet access.

- In-person signing
- Create an envelope
- Add a document
- Add in-person signer
- Add a remote signer
- Local document storage
- Enable offline mode

Please note: If users access DocuSign using Mobile Web, the user experience will display a message encouraging them to download the Mobile App, which has a more seamless interface. If users disregard this notification by closing it, they will remain where they were in their 'in-progress envelope' on Mobile Web. If they click 'Continue on Web,' the experience will take them to the Prepare page. If users elect to click on the App Store icon, it will direct them to the App Store via a built-in link to the DocuSign native app.

3.1.3.4.1 Create Documents

Yes, senders can upload documents or use existing templates to send a document via the mobile application.

3.1.3.4.2 Tag Documents

Yes, senders are able to add tags to documents before they are sent for signature via the mobile application.

3.1.3.4.3 Send Documents

Yes, DocuSign supports sending documents for signature via our mobile applications or online from a mobile device.

3.1.3.4.4 Sign Documents

Even though more than 30% of documentation is viewed and executed on a mobile device, businesses are still presenting content that looks best in print or on a large screen. DocuSign offers a solution, tested by some of our largest customers, to reduce the friction by presenting agreements as more of a webpage so that text is fully readable on smaller, or handheld devices. With Responsive Signing, customers can convert agreements to responsive HTML with no customization required by the sender. Responsive signing creates a truly mobile-first signing experience allowing signers to read agreements naturally on any device. Responsive signing offers ONS the ability to:

- Support a variety of file types (e.g. PDF, Word, Excel)
- Preview the conversion before sending
- Read naturally on any size device
- Integrates with existing workflows, recipient types, and authentication methods
- Higher completion rates – up to 5% in our pilot customers
- Twenty percent faster load times on slow connections

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

DocuSign supports electronic signature signing on mobile. DocuSign does not support digital certificate signing on mobile devices at this time.

DocuSign supports native mobile digital signatures without requiring an external TSP, using DocuSign Express Digital Signatures.

While we certainly offer the above-mentioned capability, in our experience, we don't typically see organizations based in the United States using digital certifications for their signatures. We would love to learn more about your requirements and needs for digital versus electronic signatures. We are also able to offer a variety of different authentication options and audit trails that many of our enterprise customers deploy.

3.1.3.4.6 *Shall include the ability to work both online and offline.*

DocuSign supports online and offline modes. In offline mode, the document begins on the mobile device, the user goes offline, executes the transaction in person, and then the document syncs back to the DocuSign service when the user comes back online. The document can come from any of our cloud storage integrations (including Salesforce), or from any line of business app that supports [Open In]. Documents will be able to be stored in a Library on the device for execution offline.

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 or other PDF reader to complete signing.*

When signing digitally, DocuSign does not require to have Adobe Reader or Adobe Acrobat installed locally to complete signing.

DocuSign is a Software as a Service (SaaS) offering and therefore there are no server hardware or software requirements. DocuSign has been designed to be both browser and device agnostic. It is user friendly across all devices (desktop, laptop, smart phones, pads/tablets) and all browsers (Chrome, Safari, Firefox, etc.), therefore it is accessible online and mobile. DocuSign also provides a native sending application for iOS, and Android devices and currently supports 44 signing languages and 14 sending languages.

3.1.5 Signature

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

DocuSign's Express Digital Signature enables you to satisfy your digital signature requirements, while providing the fast time-to-market, scalable capacity, and continuous user innovation of a cloud-based solution. While a DocuSign Express Digital Signature makes your eSignature transactions digital signature-compliant, some transactions in some industries require digital signatures using specific third-party digital certificates. For that, DocuSign supports third-party signatures from SAFE-BioPharma Digital Signature and DocuSign France (formerly OpenTrust).

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

Signers can select the 'Decline to Sign' option and they can be required to fill in a reason (free text field) for declining. Email notifications can be configured to alert the sender whenever a signer has declined to sign an envelope sent by the sender.

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

Electronic signature consent is managed using an optional consumer disclosure. The process can be configured to present any language (including T&Cs) that ONS requires. This can be done from within the document presented and provide a checkbox or initials field for acceptance, or within a pre-signing disclosure that is customizable using ONS's legal language. A disclosure template is provided and can be modified by an administrator.

There are two ways to customize your Consumer Consent Disclosure: Block editing or HTML editing. With block editing, [Client Name] adds your own specific information to the blocks by answering the questions adjacent to the blocks and the information is added the standard disclosure.

With HTML editing, ONS can create a free-form consumer disclosure using HTML formatting. When a consumer disclosure is used, a recipient must accept disclosure in order to continue signing. If it is not accepted, the recipient can abandon the session or select to 'Decline to Sign' and will be presented with a text box to enter a reason.

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

Signers must sign using a digital certificate stored in a smart card (a card that contains a chip that stores a certificate), a USB token, or installed on their computer (hence the name of the feature "signer held," with certificates physically held by the signer).

Additionally, the digital certificate must have been issued by a Certification Authority (CA), also called a Trust Service Provider (TSP) that is registered and approved by the country's National/Root Certification Authority.

For example, the certified CAs by the Chilean government are listed at <https://www.entidadacreditadora.gob.cl/entidades/>. In the European Union, all of the TSPs certified by each member state can be found in a list maintained and published by the European Commission at <https://esignature.ec.europa.eu/efda/tl-browser/#/screen/home>.

Please note that DocuSign France is a Certificate Authority certified by the French government, but DocuSign France does not issue digital certificates to individuals.

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.*

With DocuSign, signers can sign using a digital certificate in the cloud without having to download the document to the desktop.

While we certainly offer the above-mentioned capability, in our experience, we don't typically see US Based organizations using Digital Certificates for their signatures. We would love to learn more about the State's requirements and needs for digital v. electronic signatures. We also are able to offer a variety of different authentication options and audit trails that many of our enterprise companies deploy.

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

DocuSign allows customers to set their own retention policies for documents stored within DocuSign.

DocuSign is also integrated with Box, Dropbox, OneDrive, and Google Drive and can automatically push completed envelopes there.

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

Authentication

Documents completed using the DocuSign Signature service come embedded with the digitized signature (with a unique ID), a unique Envelope ID, and a certificate of completion that describes relevant transaction data (date signed, IP address of signer, method of signing, timestamps, method of authentication, etc.) related to the agreement.

Consent

DocuSign enables senders to require signers to consent to sign electronically using the DocuSign Signature service, including by using an Electronic Records and Signature Disclosure template created by DocuSign or a custom acknowledgment created by the sender.

Electronic Signature

DocuSign assigns a unique ID to each DocuSign Signature and creates a digitized image based on the signer's name or actual signature.

Tamper-proof seal

DocuSign tamper-proofs documents by assigning a unique ID to each document, maintaining an uneditable copy of the certificate of completion regarding each completed document.

Non-repudiation

DocuSign embeds other metadata into the downloaded version of the document, which enables tamper validation. Further, DocuSign maintains a certificate of completion and makes available to the sender and all nominated recipients and signers a copy of the completed document signed on the DocuSign Signature service.

Audit

DocuSign will retain all documents uploaded throughout the Term of the agreement and will make available to ONS all certificates of completion and documents for 90 days after the Term for the purpose of downloading locally.

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.*

DocuSign offers a detailed audit trail and auto-generated Certificate of Completion so that ONS can easily track the transaction history of each document and envelope.

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 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 (including SSO, if applicable) 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 electronically sign)

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.*

When signing digitally, DocuSign does not require to have Adobe Reader or Adobe Acrobat installed locally to complete signing.

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

Each DocuSign user can have one signature image and one initials image, captured the first time they use DocuSign. Currently there is no support for multiple graphical signatures for each user. Each DocuSign user can log into DocuSign.com and choose to recapture their graphical image. However, this will not update documents signed prior to recapturing the graphical signature.

3.1.6 License Subscription, Transactions and Templates

3.1.6.1 *License subscriptions shall be configured to allow a minimum of 30,000 transactions annually per year. With an additional charge per every 500 transactions in excess of 30,000 per year.*

The pricing associated will allow 30,000 transactions annually. Additional transactions per year can be added. These are included in the pricing page.

3.1.6.2 *The license will include unlimited users.*

Yes, the DocuSign account will have unlimited users.

3.1.6.3 *Transaction volumes shall be shared among the unlimited user accounts and pooled at the account level for the effective life of the contract. For example: if one account utilizes 20,000 transactions, the other accounts can employ the remaining balance between the unlimited accounts.*

Yes, transaction volumes can be shared amongst the different users and groups associated with the DocuSign account.

3.1.6.4 *Each transaction shall be capable of including an unlimited number of documents.*

Users can send multiple documents in each transaction. This can be done by uploading documents directly into an envelope or a template. At the completion of the transaction, DocuSign can produce the final, tamper-evident documents as a single document or as a package of all documents individually.

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

Documents can be included from active accounts with various cloud repositories such as Box, Google Drive, One Drive, and Dropbox.

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

DocuSign's templating capabilities allow ONS 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, ONS can:

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

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

Please see this link that guides users and admins how to create and utilize templates:

<https://support.docusign.com/en/guides/ndse-user-guide-create-templates>

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

DocuSign templates will save the name and email addresses of all defined recipients, but not placeholder recipients (i.e. finance@yourorg.com vs. jane.doe@yourorg.com). All transactions that are launched using the template will retain all name and email addresses of the recipients that were defined for it.

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.*

DocuSign supports both serial and parallel workflow, and a combination of the two, with an unlimited number of recipients. Both internal and external signers are supported, in any order.

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 a delay between signatures and set the delay to be a specific number of days and hours after the previous recipient finishes or set it to a specific date and time.

With DocuSign's powerful signing workflows, 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

Through workflows, ONS may control who receives copies of completed documents internally. In order to comply with ESIGN, a completed notification and access to any documents that a signer has signed will be emailed to the signer.

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

Using the DocuSign Document Markup feature, recipients can make changes to a DocuSign document. Recipients can use the markup tool to:

- "Whiteout", or cover-up, document text to show deletions
- Cover up text and add new text over the old text
- Add new text in a blank region of the document

If a recipient makes changes, all other recipients must review and approve the changes. Recipients that signed a document before the changes were made receive a new email notification, must review the document again, and then approve the changes before the document is finalized.

Tip! Add a note to your recipients informing them that they can use the markup feature.

Your recipients receive the request to sign a document and, during the signing process, they have the option to use the markup tool.

Note: All changes that recipients make are recorded in the document history. Note: The Document Markup feature is supported only in the Advanced Workflow Module.

<https://support.docusign.com/en/articles/How-do-I-let-a-signer-make-changes-to-a-document>

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

Signers can be anyone that ONS designates (primary recipient). If the primary recipient isn't available, envelopes can be routed to an alternate.

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. Please 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).*

DocuSign supports sending the same documents to a list of recipients simultaneously. Documents can be routed through a parallel workflow. Multiple recipients can receive the same document at the same time. These workflows can be placed on a transaction (document(s)) within a pre-defined template or an ad-hoc document send.

Additionally, DocuSign provides Bulk Send functionality which is well suited to high volume use cases. Customers can send out a document to a large number of people while including multiple recipients (i.e. an

employee and their manager), recipient types (i.e. needs to sign, receives a copy, needs to view), and envelope custom fields.

You simply set up your envelope once, import your recipients, and each receives a unique copy of the documents to complete. Additionally, you can customize authentication, add notes and other custom information for each recipient.

For more information, please see <https://support.docusign.com/en/guides/ndse-user-guide-using-bulk-send>

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.*

DocuSign has a capability called Visibility. Document Visibility allows the sender to create an envelope with multiple documents and limit the documents recipients can see. This way, the sender only has to send one envelope with all the documents, rather than sending multiple envelopes with only a few documents. The sender has fine grain control to determine which recipients can view which documents in an envelope (transaction). Additionally, you can have carbon copy recipients who don't sign documents, but can be designated to see hidden documents. 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.

Additionally, DocuSign Comments is compatible with Document Visibility. Users can compose and reply to comments regardless of the Document Visibility setting on an envelope.

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.*

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 the 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.

Additionally, users can leverage DocuSign Comments prior to sending an envelope and while 'correcting' an envelope. After creating an envelope and going to the 'add fields' page, users can click the 'Add Comment' icon at the top of the page to apply a comment to the newly created document. When correcting an envelope, users can see existing comments and add their own.

With Comments, ONS 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
- Get paid instantly and avoid delays in collecting money owed
- Reduce errors to ensure you get paid the right amount
- Streamline future payments by saving your customers' payment method

Benefits of DocuSign Comments:

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

Group Comments: The Comments feature allows senders and signers to collaborate in real-time by asking and answering questions within an agreement. With Group Comments, users can privately communicate to a subset of envelope recipients.

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.

DocuSign provides powerful control over corrections including changing signer, email, signature locations, document addition/changes, authentication, and workflow. Please note that corrections can only be processed prior to signing completion. Any signer that has completed their signing ceremony will be ignored when the corrections are executed. Corrections can be executed interactively or through the APIs.

DocuSign leads the industry in on document and during workflow control options. The ability to extract, deliver, permission, govern, change, audit, and archive data elements associated with a given document allows DocuSign to address a limitless number of use cases. The following types of corrective activities can take place while an envelope and its associated documents are out for signature.

Signer Identification and Signing Order

- Permission-based workflow changes
- Permission-based document visibility
- Permission-based field data changes
- Logic-based field data controls (amount, etc.)

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

DocuSign is the only vendor to support serial, parallel, and mixed routing workflow across DocuSign's web application, it's mobile applications, and within integrations such as eSignature for Salesforce.

DocuSign provides the ability to route document(s) with simple and complex workflows that can incorporate multiple signers and group signing in a combination of serial and parallel workflows. These workflows can be placed on a transaction (document(s)) within a pre-defined template and or an ad-hoc document send. A User of the system can manage the workflow based on their level of access to change the templates for ongoing workflow management. If using the ad-hoc sending of a document, the sender can manage the workflow.

DocuSign users can configure which events will trigger a notification. See below for options:

Signer

- Sign All
- I have an envelope to sign
- An envelope that I have signed is complete
- I have been designated to receive a copy of an envelope
- I have been asked to Acknowledge receipt of an envelope
- A fellow recipient has declined to sign an envelope
- An envelope has been voided by the sender
- An envelope has been corrected by the sender
- A signer has reassigned their envelope to me
- Documents inside an envelope will be purged from the system
- Your fax has been received
- Another signer has made changes that need my approval
- I represent signers and need to provide contact information
- An envelope that I signed offline failed to synchronize

Sender

- Select All
- An envelope that I have sent is complete
- An envelope that I have sent has been assigned to a different signer
- A signer has declined to sign an envelope that I sent
- A signer has withdrawn their consent to do business with me online
- An envelope that I have sent has been viewed
- An envelope has failed to be delivered to a recipient
- A signer's offline signature failed to synchronize for an envelope that I have sent

Notifications, reminders, and statuses can all be controlled granularly at the transaction level. The customer application defines which notifications, reminders, and statuses are defined as part of the meta-data used to make the API call to create the transaction. Based on the agent's preference, the customer application can set up the notifications, reminders, and statuses for a transaction.

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, DocuSign France (formerly 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.*

Senders will determine which type of certificate recipients will need to use when the DocuSign envelope is created, they can specify between DocuSign Express, DocuSign France (formerly OpenTrust), DocuSign Signature Appliance, or Signer-Held.

3.1.8 Authentication

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

With DocuSign, you can verify your signer's identity at the time of signing:

- Most robust authentication options (e.g. One-Time Password, SMS, Phone, Knowledge-Based Authentication (KBA), Single Sign-On, Access Code, IDV (Passport/eID/Driver's License), fully custom, and more)
- Comprehensive multi-factor authentication support
- Automatically stores authentication audit trail
- Optional persistent authentication for improved usability

Benefits of DocuSign's Authentication

- 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

DocuSign supports both local and remote signing and can either sit behind existing authentication, i.e. a customer portal or manage that within our infrastructure.

If DocuSign is managing the authentication, we offer a variety of methods (email, access code, SMS, phone, knowledge-based, and SAML) that can be controlled at an account, sub-account, or template level.

For more information, please see <https://support.docusign.com/en/articles/What-kinds-of-Recipient-Authentication-are-available>.

3.1.8.2 *Methods of user account authentication shall include:*

3.1.8.2.1 *Phone*

DocuSign phone authentication validates a person's phone number and access to that phone number and records the signer's voice as a biometric factor attached to the record. During phone authentication, after the recipient successfully enters the access code, they are asked to state their name for the recording. DocuSign also offers the option of using phone authentication without capturing the recipient's voice recording. Disabling phone authentication voice recording can only be done on an account-wide basis and only by DocuSign. Please contact your DocuSign Account Team for more information on enabling this feature.

3.1.8.2.2 *SMS*

Over the past decade, consumers have shifted towards mobile devices as a means to access and share information. A study found that consumers prefer SMS notifications over email by 2.5x when it comes to receiving important notifications. However, email is still the tried and true way to communicate business information. DocuSign believes in a multi-channel communications approach and offers SMS Delivery of Notifications.

Senders from ONS can enhance email notifications with real-time SMS notifications sent directly to a signer's mobile device. Recipients can perform the signing actions that they might usually perform from an email request, including:

- Access the signing session with or without an access code as described in [Sign a Document with DocuSign](#)
- Finish later - save changes and complete signing at a later time
- Change signing responsibility
- Decline to sign
- Etc.

The benefits of SMS are immediate and quantifiable:

- **Reach more signers** - SMS notifications can be used in over 180 countries
- **Speed up transaction times** - the average response to a text message is only 90 seconds
- **Provide a superior customer experience** - Track envelope completion directly from reports on your central DocuSign envelope dashboard

Please note, your signers will always receive an email notification along with the SMS notification.

Combined with our [responsive signing functionality](#), SMS Delivery enables your organization to differentiate your business with an engaging signing experience.

3.1.8.2.3 Knowledge Based Authentication (KBA)

Knowledge-based Authentication (KBA) requires the recipient to answer detailed questions about themselves, based on data available in public records, such as their current and former addresses. The signer must correctly answer a list of personally identifying questions to open the document. This option can include OFAC Checking and Age Verification. Service provided by LexisNexis. Please note that KBA is only valid in the United States.

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, documents can be kept for as long as your organization determines necessary and can be changed by users with administrator permissions.

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

ONS may retrieve electronic copies of its stored eDocuments at any time while this Service Schedule is in effect at no additional cost. DocuSign will store all completed eDocuments sent by ONS during the Term, by default. However, ONS has the option through its Account Administrator to change its Account settings

to direct the deletion of all or certain designated eDocuments at an earlier date or periodic interval. If ONS fails to retrieve its eDocuments prior to the expiration or termination of the Service Schedule, ONS may request, no later than ninety (90) days after such expiration or termination, that DocuSign provides Professional Services to assist in retrieving completed eDocuments still remaining in the System, the details of which Professional Services will be set out in a SOW. After such ninety (90)-day period, DocuSign shall have no obligation to maintain or provide any eDocuments and DocuSign shall have the right to delete all eDocuments in the System or otherwise in its possession or under its control and delete ONS's Account.

DocuSign may retain Transaction Data for as long as it has a business purpose to do so, provided that any Transaction Data that constitutes Confidential Information of ONS will at all times maintain that status and DocuSign will comply with its confidentiality obligations as provided in the Agreement.

All aspects of each signed transaction are logged and captured in the transaction history and stored as hashed, encrypted data associated with each sent and signed envelope. Events associated with a document processed on the DocuSign Signature service are logged including send, sign, correct, reassign, deliver, and view.

In relation to a certificate of destruction, this would not be applicable to the DocuSign Signature service as Customers are empowered to control the retention period of their documents stored in the system and DocuSign stores Envelope transactional data for the duration of time in which it maintains a legitimate business purpose to do so.

3.1.10 Platform

3.1.10.1 *Average system availability shall be more than 99.5%.*

Each DocuSign instance has category-leading reliability with our multiyear track record of 99.99% availability without scheduled downtime for maintenance. With near real-time secure data replication and uptime, 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 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.

DocuSign's platform infrastructure is 100% dedicated to its customers, and as such, DocuSign is unique in its ability to deliver unparalleled availability at scale without maintenance downtime.

3.1.10.2 *Shall have redundant and geo-dispersed data centers.*

DocuSign contracts professional, commercial-grade Tier III data center facilities. DocuSign uses three geographically dispersed data centers to host the service within the US (Seattle, Chicago, and Texas) and seven geographically dispersed data centers in Europe, Canada, and Australia. Any one of the data

centers can run the entire DocuSign service on their own without any performance or functional degradation. When maintenance needs to be performed, any one of the data centers can be taken offline without any discernible effect on the DocuSign service. This results in zero service downtime. The service is highly available 24/7/365.

With DocuSign's category-leading architecture, secure replication is performed in near real-time to our geodiverse active systems. DocuSign designs all deployments to be fully redundant and fault tolerant. DocuSign's data center architecture is active-active-active. There are no single points of failure in our load balanced, redundant configuration. Our environment uses load balancers to spread the 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 nine times across the systems that can recover in the event of any failure. All data are 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 five-minute recover point objective in the event of a single site catastrophic failure.

Since data are replicated to geographically dispersed data centers traditional backups of document data are unnecessary, DocuSign makes up to eight perpetual backups of blob data, along with daily full and 15-minute differential backups of the database, and maintains five 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 backups. Every two hours, the most recent OLTP backup is validated. DocuSign's failover capability is tested monthly during monthly site maintenance.

DocuSign's data centers are commercial-grade, PCI DSS compliant, and SSAE 18, SOC 1 Type 2, SOC 2 Type 2 examined and tested. DocuSign's architecture features simultaneously active and redundant systems (data centers) that allow the overall system to survive full site outages so it's "always on". Customer data is stored up to nine times across geographically disparate locations. This distributed nature also ensures data resiliency for disaster recovery purposes with an RPO of five minutes and an RTO of 15 minutes.

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

DocuSign allows customers to choose where their data is located and stored.



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

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
- Company-wide communication testing
- Pandemic Testing
- DERT (DocuSign Emergency Response Team)

Emergency response team exercises completed throughout the year:

- First Aid/CPR
- Physical safety and security
- Emergency response team drills fire drills
- Company-wide personal safety and awareness training

DocuSign does not outsource recovery services as we have dedicated recovery services. With DocuSign's category-leading 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 the 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 nine times across the systems that can recover in the event of any failure. All data are 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 five-minute recover point objective in the event of a single site catastrophic failure.

Since data are replicated to geographically dispersed data centers traditional backups of document data are unnecessary, DocuSign makes up to eight perpetual backups of blob data, along with daily full and 15-minute differential backups of the database, and maintains five 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 backups. Every two hours, the most recent OLTP backup is validated. DocuSign's failover capability is tested monthly during monthly site maintenance.

DocuSign's data centers are commercial-grade, PCI DSS compliant, and SSAE 18, SOC 1 Type 2, SOC 2 Type 2 examined and tested. DocuSign's architecture features simultaneously active and redundant systems (data centers) that allow the overall system to survive full site outages so it's highly available. Customer data is stored up to nine times across geographically disparate locations. This distributed nature also ensures data resiliency for disaster recovery purposes with an RPO of five minutes and an RTO of 15 minutes.

ONS can conduct penetration testing against the DocuSign Demo environment. To do so, Assessments can send the Rules of Engagement Template upon receiving the name and email of the Pen Tester.

3.1.10.5 *Shall be capable of functioning across heterogenous computing platforms.*

DocuSign is a Software as a Service (SaaS) offering and therefore there are no server hardware or software requirements. DocuSign has been designed to be both browser and device agnostic. It is user friendly across all devices (desktop, laptop, smart phones, pads/tablets) and all browsers (Chrome, Safari, Firefox, etc.), therefore it is accessible online and mobile. DocuSign also provides a native sending application for iOS, and Android devices and currently supports 44 signing languages and 14 sending languages.

3.1.11 Integration

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

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 a sandbox testing environment

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.

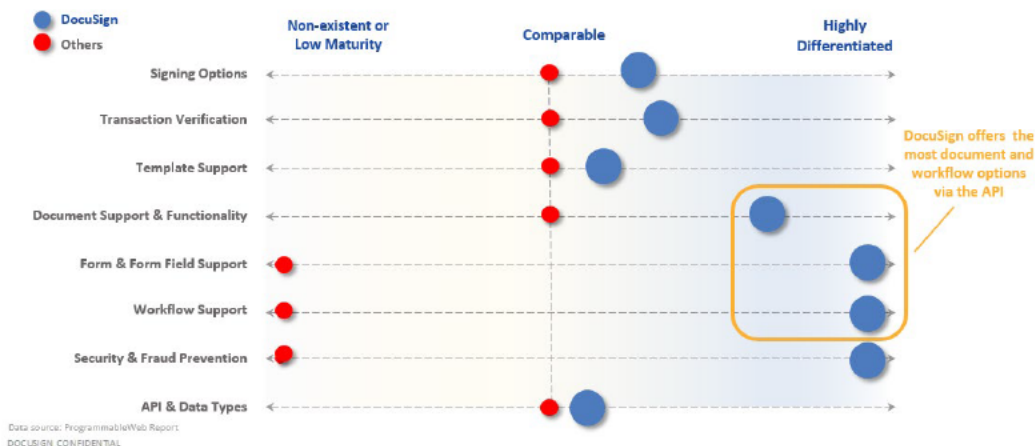
The DocuSign advantage is clear.

DocuSign APIs	Other eSignature Provider’s APIs
<ul style="list-style-type: none"> • REST & SOAP APIs, 3,500+ certified customer integrations, robust sample code, documentation, and developer support 	<ul style="list-style-type: none"> • Minimal sample code and documentation available
<ul style="list-style-type: none"> • 10 SDKs (including iOS Mobile SDK – including offline) 	<ul style="list-style-type: none"> • No robust SDKs available, no iOS mobile SDK
<ul style="list-style-type: none"> • The majority of transactions completed using the DocuSign API 	<ul style="list-style-type: none"> • < 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 ONS's behalf. DocuSign is the only vendor to support integrations with 10 different SDKs, including the only vendor to provide customers with an iOS mobile SDK for custom app integration on Apple devices. 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. More information can be found at <https://developers.docuSign.com/>.

ProgrammableWeb Rankings of DocuSign’s API

DocuSign’s APIs are ranked #1 in every category



In 2019, DocuSign was rated 'Best Innovation in API Services' at the Devies Awards. Jeff Domoracki, CEO of DevNetwork and producer of DeveloperWeek, is quoted as saying "Developer technologies and tools are massively growing in their importance to a business's operations. DocuSign is a great example of the new

era of products and services empowering developers and engineers to have a greater impact on a company's bottom line."

DocuSign has the largest developer community by many multiples with over 200,000 developers accounts registered. DocuSign has completed and certified more than 3,500 customer integrations, far more than any other vendor.

3.1.11.2 APIs shall be available in both REST and SOAP

DocuSign provides full web-services APIs in SOAP and REST.

3.1.11.3 Tools available to support APIs shall:

3.1.11.3.1 Have a developer center/forum

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, 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.

eSignature SDKs

Integrate the DocuSign eSignature API into your apps and websites in minutes.

REST API

The following Swagger-generated open source SDKs and tools wrap the eSignature REST API and provide access to all publicly available endpoints and data models at the service layer:

- C# SDK
- Java SDK
- Node SDK
- PHP SDK
- Python SDK
- Ruby SDK
- Postman eSign API Collection

Additionally, the iOS Offline Templates SDK is a dynamic framework that provides native sending/signing UI components and is the first and only DocuSign SDK that supports offline signing:

SOAP API

The following SDKs can be used to integrate the DocuSign eSignature SOAP API into your apps and websites: Java, NET, PHP, Ruby, and Apex SDK.

Our new Python and Ruby SDKs are part of our Swagger tools family, meaning just like our C#, Java, Node.js, PHP, and Obj-C SDKs, they provide access to all public REST API endpoints and data models. They are also open source and licensed under the MIT license.

If you're developing a mobile iOS app and are utilizing template driven document workflows you'll definitely 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.

API Go Live Process

We recently released a new API Go-Live process that lets developers launch their integration in just minutes or hours! Note that, similar to other platforms, we require the completion of a quick review process before your app is given production access.

To go live with the DocuSign API, you need:

- Integrator Key
- 20+ Eligible Demo Transactions (sent through sandbox)
- A Live DocuSign Account
- Admin access to the live account

Additional Developer Tools

Here are some additional developer tools that are super useful and great resources to help you integrate with our APIs:

- **API Explorer:** Test any and every REST API call without writing any code. Simply authenticate, select your request, add required and optional parameters, and click SEND REQUEST... it's that easy! Note: The API Explorer makes requests against the DocuSign Demo environment.

- **API Docs:** Our standard API reference documentation
- **API Recipes:** Our API Recipes (aka code walkthroughs) show you how to accomplish specific API workflows, enabling you to quickly add functionality to your app, such as Embedded Signing, Requesting Signatures, Webhooks, and much more.
- **Sample Loan App (with Code):** The LoanCo app (Node.js, C#) shows three different use-cases, showcasing features like embedded signing, custom branding, calculated fields, and more.
- **Postman Collection:** Quickly test the DocuSign REST API against the environment of your choice (demo or live).
- **Free Support:** In case you get stuck on anything or have questions we have an active developer community on Stack Overflow, see the DocuSignAPI tag.

3.1.11.3.2 Offer certificate-based API security access for integrated applications

Certificate-based authentication can be enabled on your DocuSign account to provide additional security checks for API calls.

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

DocuSign offers the Connect Publisher service, which provides guaranteed delivery of documents in real-time as documents are signed and to any document repository of ONS's choice. Aside from documents, this service also delivers:

- Form field data contained in the documents (entered by signers, senders, or client systems)
- Custom data fields with specific attributes provided by the sender or client systems (keys to foreign systems, account numbers, etc.)
- Transactional metadata to provide business intelligence into the usage of electronic signature (envelope status, recipient status, time sent, time signed, etc.). Documents and associated data can also be retrieved from 3rd Party systems via our API (REST and SOAP).

3.1.11.3.4 Be able to provide real times status/event updates to third-party applications

DocuSign can provide real-time status updates to your internal systems, empowering your workforce with critical information about the signing process within systems they already use. This can be achieved either through API calls to DocuSign or by subscribing to our DocuSign Connect Service. DocuSign Connect will push status/event updates to a 3rd party listener.

3.1.11.3.5 Offer a dedicated SDK for IOS mobile development

Yes, our native iOS SDK provides:

- **Offline functionality in 3rd party apps:** Extends DocuSign iOS app functionality for offline signing driven by templates
- **Uses native components:** Looks/feels like a standard iOS app by leveraging native iOS buttons and headers

- **Customization:** App developers can customize button colors and border to match the color scheme of the app

3.1.11.3.6 Offer a dedicated SDK for Android mobile development

Yes, DocuSign offers an SDK for Android development.

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

DocuSign has SOAP and REST API features that allow our customers to bring DocuSign functionality into third party applications, web applications, and mobile applications. This includes being able to host embedded signing sessions. Complete information is available at our Developer Center located at <https://developers.docusign.com/>

3.1.11.3.8 Offer a testing environment for development and testing of applications

DocuSign's sandbox provides for a safe and secure test environment. With our sandbox, ONS can test functionality, scalability, and performance before the production release. The sandbox also enables early access to DocuSign innovations and code base and allows IT teams to maintain separate development and production environments.

Benefits for ONS

- **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

Sandbox Overview:

- Targeted to organizations who need to test DocuSign custom integrations, performance, surge, and scalability
- Customers can perform ongoing testing at normal loads (up to 3x monthly average)
- Metadata retained temporarily
- Access to our Professional Services team as an optional add-on

3.1.11.3.9 Include at a minimum the following integrations/pre-built connectors/drivers that are out-of-the box:

DocuSign is designed to connect systems to other systems and to the users that need to approve, sign, and interact with documents. As such, the following objectives are critical:

- Make it easy for systems to invoke DocuSign programmatically
- Make it easy for systems to receive information from DocuSign
- Make it easy for individuals to perform the processes required of them within the way that they interact in a digital world

DocuSign has focused on these objectives and built a platform that allows companies to fully digitize their processes allowing individuals to transact business on practically any device, from almost anywhere, at any time. DocuSign has developed the largest eSignature partner ecosystem.

DocuSign's vast ecosystem of out-of-the-box connectors with the most popular systems

- Get up and running quickly with over 350 pre-built partner integrations
- Take advantage of readily made integrated solutions to popular CRM, Productivity, ERP/CLM, and collaboration applications
- Digitize approval processes with your existing industry-specific applications

DocuSign is proud of the depth of our integrations, as not all integrations surface equivalent functionality or are as deeply embedded. For example, DocuSign was Microsoft's Partner of the Year, the most popular download on the Salesforce AppExchange and the only e-signature vendor sold by SAP.

Integrations are built using a product API. DocuSign's entire product is surfaced through this API, whereas other products may not surface User Management or provide the same granularity. This has allowed DocuSign to have deeper integrations in commercial or in-house applications.

Learn about other partner integrations in our Solution Showcase: <https://www.docusign.com/partners/solution-showcase>.

Partners are a critical component to helping DocuSign customers achieve rapid ROI, fully-automated critical business processes, and maximize the advantages of conducting business in the Cloud. The DocuSign Partner Portal Program is designed to accelerate our partners' success. Search our Partner Directory to find the right partner focused on your needs: <https://www.docusign.com/partners/partner-directory>.

3.1.11.3.9.1 BlueBeam

The Bluebeam Revu pdf application (all editions) includes support for DocuSign Signature Appliance digital signatures. DocuSign Signature Appliance helps Revu customers maximize the benefits of their investments in automation by integrating digital signature capabilities directly into their business processes and workflows.

3.1.11.3.9.2 Adobe Reader and Adobe Acrobat

Yes, DocuSign supports files created by Adobe Reader and Adobe Acrobat.

3.1.11.3.9.3 Microsoft Office 2016 applications

Through a long-term strategic partnership with Microsoft, DocuSign has made its industry-leading electronic signature technology and agreement cloud solution functionalities widely available to businesses and consumers within Microsoft applications. Robust apps for Outlook, Word, SharePoint, Dynamics 365 CRM, and Windows make it easier for organizations of every size, industry, and geography to quickly and securely transact business on practically any device, from almost anywhere, at any time.

Microsoft is a longtime 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 US-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.

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. DocuSign for Word relies on DocuSign, a subscription-based service, and is supported for Word Online, Word for iPad, Word 2013, and Word 2016 (Windows). The app is designed to work with DocuSign Individual, Professional, Business, or Enterprise subscription plans. Users can sign up for a DocuSign free trial from the DocuSign for Word app. Increase productivity and transact faster by keeping business digital.

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 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 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 Microsoft Flow enables you to act of agreements with Power Automate. Set up post-signature automated workflows between your favorite apps and services to synchronize files, get notifications, collect data, and more. Add DocuSign eSignature to a workflow to automatically send your agreements and approvals out for electronic signature.

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.

DocuSign for MS Teams enables seamless collaboration and keeps business moving forward from anywhere. With this new chatbot, users will receive real-time notifications when a signature is requested, a document has been signed, or a reminder to sign is triggered- right from where they are already working. This eliminates the need to switch between apps, boosting productivity and accelerating the completion of agreements.

3.1.11.3.9.4 Microsoft 365 applications

Connecting the Best of Microsoft with DocuSign eSignature

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. DocuSign for Word relies on DocuSign, a subscription-based service, and is supported for Word Online, Word for iPad, Word 2013, and Word 2016 (Windows). The app is designed to work with DocuSign Individual, Professional, Business, or Enterprise subscription plans. Users can sign up for a DocuSign free trial from within the DocuSign for Word app. Increase productivity and transact faster by keeping business digital.

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 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 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.

DocuSign for MS Teams

Seamlessly collaborate and keep business moving forward from anywhere with DocuSign eSignature for Microsoft Teams. With this new chatbot, users will receive real-time notifications when a signature is requested, when a document has been signed, and reminders to sign - right from where they are already working. This eliminates the need to switch between apps, boosting productivity and accelerating the completion of agreements.

Get notifications when you need to sign or when someone completes an agreement.

3.1.11.3.9.SNuance PDF

Yes, DocuSign supports documents create in NuancePDF.

3.1.12 Additional Requirements

3.1.12.1 Shall include an option for document storage

DocuSign will store all completed eDocuments sent by ONS during the Term, by default. 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, Ariba, 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.*

DocuSign has a robust, scalable solution for our electronic signature platform. On average, millionsof transactions are signed per day, which is far less than our deployed capacity. DocuSign product offering can scale both horizontally and vertically. Each tier can scale independently of the other tiers, allowing DocuSign to address bottleneck related issues, or 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.

To further ensure our service is highly available, even during peak traffic, and scalable for future growth, we undertake robust capacity planning. The DocuSign eSignature platform runs below capacity to accommodate spikes in demand on our service, and we process approximately 12 terabytes of telemetry data per day to monitor and assess the end-to-end customer experience as one of multiple inputs for scalability planning.

There are no limits to concurrent users. ONS can set up as many users as you like, all gaining access at the same time (as necessary) for no additional cost.

3.1.13.2 *Shall have the ability to support multiple locations.*

Yes, as a SaaS solution, DocuSign is available for use around the world as allowed by the customer.

3.1.13.3 *ONS shall have the ability to pool the total number of transactions so that they are available to all licensed users.*

Yes, DocuSign provides the ability to pool transactions so all licensed users can send documents for signatures.

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

DocuSign transactions do not roll over. The purchased allotment of envelope transactions is available for use during the term that is contracted for. Any unused transactions cannot be utilized in another contract term.

3.1.13.5 ONS shall have the ability to procure additional transactions for the license pool.

Yes, ONS will have the ability to procure additional transactions at any time.

3.1.14 Security

3.1.14.1 Solution shall be able to ensure sensitive customer data is encrypted at rest and in motion. Solution should follow the Health Insurance Portability and Accountability Act (**HIP AA**) of 1996 collectively with the Standards for Privacy of Individually Identifiable Health Information, 45 C.F.R. Part 160 and Part 164, Subpart E, and the HIPAA Security Standards, 45 C.F.R. Part 160 and Part 164, Subpart C, as amended by the Health Information Technology for Economic and Clinical Health Act and regulations promulgated thereunder.

DocuSign maintains an ISO 27001, 27017, 27018, PCI DSS, and SSAE18 certified and examined key management system and as such maintains formal proprietary and confidential operating procedures which include Encryption Key Management processes and policies. Double-blind key management of encryption keys is performed by members of different teams.

DocuSign blobs are encrypted using a randomly assigned 256-bit key from the DocuSign Encryption Key Manager (DEKM). In the NA and EU rings each envelope will use a unique key. In the CA and AU rings, there are 1,000 active keys at any point in time, with keys rotated quarterly. 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 18 report with no exceptions.

Access to sensitive systems is restricted to designated Operational personnel. Corporate office connectivity is maintained via a two-factor authorized VPN. The VPN is AES-256 bit encrypted and full-tunnel.

DocuSign provides end-to-end encryption covering both data at rest and data in transit. DocuSign uses FIPS 140-2 approved algorithms (TLSv1.2 in transit and AES-256 CBC PKCS7 at rest within the system) along with x.509 Entrust certificate authority.

By default, DocuSign employs TLS 1.2. As of July 13, 2021, as mandated by the PCI Security Standards Council, DocuSign ended support for TLS 1.1 and other weak cipher suites in order to remain PCI compliant. DocuSign will not establish a connection using any version of SSL.

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

DocuSign maintains professional, commercial grade border routers at each data center.

3.1.1.14.3 *ONS shall have the option of storing and managing encryption keys on premises or in a private cloud for advanced security.*

No, DocuSign does not utilize unique encryption keys per tenant. DocuSign blobs are encrypted using a randomly assigned 256-bit key from the DocuSign Encryption Key Manager (DEKM). In the NA and EU rings each envelope will use a unique key. In the CA and AU rings there are 1,000 active keys at any point in time, with keys rotated quarterly. 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 18 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.

3.1.1.14.4 *Vendor shall provide documentation that they conduct periodic penetration testing by qualified third parties. Documentation shall include but not be limited to reports, invoice copies, certified and notarized letters.*

Yes. DocuSign is ISO 27001, 27017, 27018 certified and PCI DSS 3.2.1 compliant (level 1 service provider/level 3 merchant) and performs internal monthly vulnerability scanning and quarterly application scanning at a minimum. Quarterly external scans are conducted by a qualified third party, and annual penetration testing is conducted against both the DocuSign application and its infrastructure by credentialed, industry recognized organizations.

3.1.15 Monitoring and Incident Response

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

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 WVDHHR, Office of Nutrition Services to remediate reported data and security issues.*

DocuSign's priority is to make your DocuSigning experience safe and secure – and to ensure ONS has the information you need to feel comfortable transacting business online. That's why we created the Trust Center: to give you access to the latest DocuSign security, compliance, legal, privacy, and system performance information, all in one convenient location. <https://www.docusign.com/trust>

Trust Center Features

- **Data Governance Standards:** see how data governance standards regulations shape DocuSign's practices
- **Data Protection & Trust Guide:** find answers to common questions regarding how DocuSign protects data
- **System Status:** view a transparent record of DocuSign's availability and uptime

Benefits to ONS:

- Real time updates on status and activity relating to your business
- A revamped look with enriched content on our newest legal and privacy categories, with more robust compliance and security sections
- A home page that helps navigate visitors like ONS's partners and customers to key elements of the site

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 SSAB (Statement of 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 operating a secure infrastructure and resilient environment.

DocuSign meets and exceeds the most stringent US, EU, and global security standards. No other company can match the enterprise security and operations investments DocuSign has made—and third-party audit reports back it up. DocuSign is the only eSignature provider to be ISO 27001, 27017, 27018 and SSAE 18, SOC 1 Type2, SOC 2 Type 2 certified, tested, and examined internationally, across the entire company and its data centers.

Upon request, the DocuSign Security Trust Assurance Packet is available which contains the, SOC Reports, PCI Attestations, and annual Pen Test. Alternatively, ONS can download this packet at your convenience, <https://www.docusign.com/trust/stap>.

The ISO 27001, 27017, 27018 Certificate can be accessed on the Schellman site: <https://www.schellman.com/certificate-directory> input in DocuSign into the organization name field and hit search. This link is a direct download: <https://zpr.io/Hi5HR>

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

DocuSign received an Authorization to Operate (ATO) and is listed on the FedRAMP marketplace with a Government Community Cloud deployment model. See here for more: <https://marketplace.fedramp.gov/index.html#/products>.

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.

DocuSign logs each access and action for every transaction. The audit trail includes the Date, Time, Time zone, User, User IP address, Action, Activity, and Status for all actions performed. DocuSign also provides an exportable Certificate of Completion that summarizes a transaction's history.

Here is a sample audit trail from a completed transaction:

Activity history					
Time	User	Action	Activity	Status	
10/27/2014 4:52:06 PM PT		Registered		Created	
10/27/2014 4:52:30 PM PT		Sent Invitations		Sent	
10/27/2014 4:52:49 PM PT		Viewed		Delivered	
10/27/2014 4:55:00 PM PT		Signature Authenticated		Delivered	
10/27/2014 4:55:54 PM PT		Signed		Completed	

Signed in Location

For an incomplete transaction or a transaction still in-flight, the last entry in the list above would be the one at 4:52:49 PM. If that was the last entry in the audit trail, then the view would know that Dr. Rita Sloan has viewed, but not yet completed, the transaction.

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

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 that 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 customer systems in real-time as transactions progress to a completed state. In addition, 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.

Audit trails, such as signatures and documents, are 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 separated from the document. DocuSign is the only agreements company that provides unique features for non-repudiation, including digital audit trail and chain of custody.

DocuSign tracks activities at both a User and Transaction (Envelope) level. This activity is relevant for both audits and to drive workflows for signing documents. All of 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 is invited to sign, including whether the invitation is successfully delivered
- When a User passes or fails various authentication steps required to access the documents
- When a User agrees to a Consumer Disclosure consent
- When a User first views the documents
- When a User signs their documents
- Anytime a User downloads the documents
- Anytime a User views 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 initiates the Envelope
- When the sender activates 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 (revokes the ability to sign)

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

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

3.1.17.3 *Solution shall provide an exportable log of transaction activities.*

DocuSign logs each access and action for every transaction. The audit trail includes the Date, Time, Time zone, User, User IP address, Action, Activity, and Status for all actions performed. DocuSign also provides an exportable Certificate of Completion that summarizes a transaction's history.

Here is a sample audit trail from a completed transaction:

Activity history

Time	User	Action	Activity	Status
10/27/2014 4:52:06 PM PT		Registered		Created
10/27/2014 4:52:30 PM PT		Sent Invitations		Sent
10/27/2014 4:52:49 PM PT		Viewed		Delivered
10/27/2014 4:55:00 PM PT		Signature Authenticated		Delivered
10/27/2014 4:55:54 PM PT		Signed		Completed

Signed in Location

For an incomplete transaction or a transaction still in-flight, the last entry in the list above would be the one at 4:52:49 PM. If that was the last entry in the audit trail, then the view would know that Dr. Rita Sloan has viewed, but not yet completed, the transaction.

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

Upon transaction completion, DocuSign applies a digital signature. This digital signature is completed in accordance with open ISO standards for the Portable Document Format (PDF), so nothing proprietary to DocuSign is required to validate the integrity of completed documents outside of the DocuSign system. The digital signature proves the document is valid and originated from DocuSign. The digital signature also includes our Tamper Evident Seal, which proves the document has not been altered and that the DocuSign system managed the electronic signature process, which is compliant with the federal E-SIGN Act. Trusted date and time stamps from the DocuSign system are also placed when the document is completed.

3.1.17.5 Shall comply with the following laws and regulations:

- U.S. E-SIGN Act https://uscode.house.gov/view.xhtml?path=/prelim@title_15/chapter96&edition=prelim
- State Laws modeled after the 1999 UETA
<https://www.wvlegislature.gov/wvcode/code.cfm?chap=39A&art=1>
- eIDAS Regulation <https://eur-lex.europa.eu/legalcontent/EN?TXT/HTML??uri=CELEX32014R0910&from=EN>
- EU Directive on eSignature 1999/93/EC <https://eurlex.europa.eu/legalcontent/EN/TXT/HTML/?uri=CELEX:31999L0093&from=EN>
- UK Electronic Communication Act (2000)
<https://www.legislation.gov.uk/ukpga/2000/7/enacted/data.xht?view=snippet&wrap=true>

DocuSign can be used in a manner that complies with a number of electronic signature and record laws and regulations, including the E-SIGN Act, eIDAS regulation, EU Directive on eSignature 1999/93/EC, 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.

Between the United States Electronic Signatures in Global and National Commerce (E-SIGN) Act and the Uniform Electronic Transactions Act (UETA), there are four major requirements for an electronic signature to be recognized as valid under US law. Those requirements are:

- **Intent to sign:** Electronic signatures, like traditional wet ink signatures, are valid only if each party intended to sign.
- **Consent to do business electronically:** The parties to the transaction must consent to do business electronically. A business's consent can be established by analyzing the circumstances of the interaction, but consumers require special considerations. Electronic records may be used in transactions with consumers only when the consumer has: received the UETA Consumer Consent Disclosures, affirmatively agreed to use electronic records for the transaction, and has not withdrawn such consent.
- **Association of signature with the record:** To qualify as an electronic signature under the E-SIGN Act and UETA, the system used to capture the transaction must keep an associated record that reflects the process by which the signature was created or generate a textual or graphic statement that's added to the signed record proving the record was executed with an electronic signature.
- **Record retention:** US laws on electronic signatures and electronic transactions require that electronic signature records be capable of retention and accurate reproduction for reference by all parties or persons entitled to retain the contract or record. DocuSign's solutions exceed these requirements, and we warrant that the use of our electronic signature service will assist in the formation of an electronic signature in compliance with the E-SIGN Act. This E-SIGN warranty is included in our standard terms and conditions for US customers.

DocuSign's solutions exceed these requirements and are warranted for compliance with the E-SIGN Act. This warranty is included in our standard terms and conditions for US customers.

For prospective customers located in the United States, DocuSign recommends its *Electronic Signatures and Transactions in the United States* whitepaper, which provides an overview of the legislation enabling electronic signature usage in the United States, key legal factors arising in electronic transactions, and

relevant case law. The whitepaper can be accessed at <https://www.docusign.com/whitepapers/electronic-signatures-and-transactions-in-the-united-states>.

3.1.17.6 *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.*

DocuSign can be used in a manner that complies with a number of electronic signature and record laws and regulations, including the ESIGN Act, eIDAS regulation, EU Directive on eSignature 1999/93/EC, 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.

Between the United States Electronic Signatures in Global and National Commerce (ESIGN) Act and the Uniform Electronic Transactions Act (UETA), there are four major requirements for an electronic signature to be recognized as valid under US law. Those requirements are:

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- **Association of signature with the record:** To qualify as an electronic signature under the ESIGN Act and UETA, the system used to capture the transaction must keep an associated record that reflects the process by which the signature was created or generate a textual or graphic statement that's added to the signed record proving the record was executed with an electronic signature.
- **Record retention:** US laws on electronic signatures and electronic transactions require that electronic signature records be capable of retention and accurate reproduction for reference by all parties or persons entitled to retain the contract or record. DocuSign's solutions exceed these requirements, and we warrant that the use of our electronic signature service will assist in the formation of an electronic signature in compliance with the ESIGN Act. This ESIGN warranty is included in our standard terms and conditions for US customers.

DocuSign's solutions exceed these requirements and are warranted for compliance with the ESIGN Act. This warranty is included in our standard terms and conditions for US customers.

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3.1.18 Qualification

Vendor, or Vendor's staff requirements are inherently limited to individuals rather than corporate entities, shall have the following minimum qualifications:

3.1.18.1 Experience: *Vendor, or Vendor's supervisory staff assigned to this project, must have successfully completed at least two projects that involved work similar to that described in these specifications or the Project Plans. Compliance with this experience requirement will be determined prior to contract award by the State through references provided by the Vendor upon request, through knowledge or documentation of the Vendor's past projects, through confirmation of experience requirements from the architect assisting the State in this project, or some other method that the State determines to be acceptable. Vendor must provide any documentation requested by the State to assist in confirmation of compliance with this provision. References, documentation, or other information to confirm compliance with this experience requirement may be requested after bid opening and prior to contract award.*

DocuSign has a high bar for the Professional Services team in general. They are considered top-tier escalation right under product development. This means they are the most knowledgeable about the product and must have a high degree of business acumen. Your team is not assigned until there is a signed work order.

DocuSign assigns resources (who are full-time DocuSign Staff) on a first come first serve basis from the date of mutual acceptance of the Statement Of Work (SOW). From that point, we need one to two weeks to schedule those resources that need to be considered in your planning.

The average tenure in Professional Services is over four years, with our more senior members having over eight years of DocuSign implementation experience. Typically, team members have worked on approximately 500 implementations within four years. Depending on the project scope, we anticipate a compilation of the roles listed below working on a project with ONS:

1. **Customer Success Architect:** This role is focused on helping you understand your current process costs, what your expected costs would be with DocuSign, how easy each use case would be to implement, and the readiness of each group to adopt. They then create a road map of adoption and help with the culture change and overall change management and adoption plan to ensure you are maximizing your ROI from your DocuSign investment.
2. **DocuSign Product Specialist:** This role provides expertise on the functionality of the DocuSign(s) product, configuration, and working knowledge of previous implementations of the DocuSign solution covering a wide range of market segments. This work will be critical for envisioning possible solutions/configurations of the product for multiple business requirements.
3. **Technical Consultant:** This role will function as the technical resource to address any integration, infrastructure, or security issues/questions that may arise.
4. **Business Consultant:** This role will serve as a subject matter expert within your sector as well as expertise in applying the DocuSign solution to this vertical. This role will also bring best practices in electronic signatures to your business practices.
5. **Project Manager:** The Project Manager will provide overall project management, management for DocuSign resources necessary to support the scope of work and for the Project
6. **Trainer:** The trainer has a deep knowledge of the DocuSign service line and will provide training on the use of various features of DocuSign.

3.1.18.2 System shall be currently in use in situations that involve high volume transaction and multi-location environments. Agency may request list of uses prior to award.

DocuSign has more than 1 million customers across all industries and more than 180 countries across the globe.

3.1.18.3 Vendor shall have a dedicated security team.

DocuSign's Cyber Security Incident Response Team responds to all suspected security incidents related to the DocuSign agreement Cloud. When security incidents are flagged by monitoring tools, this team tracks cases and follows the Incident Response Playbook and Standard Operating Procedures (SOPs) to resolve security incidents. This team is led by a Director of Cyber Security. Additionally, DocuSign's General Counsel and CLO also oversee and identify legal issues within and for all DocuSign departments, including product development, marketing, sales, finance, and human resources.

DocuSign's Security Leadership Team was awarded a 2018 CSO50 Award. CSO recognizes 50 organizations for security projects and initiatives that demonstrate outstanding business value and thought leadership. This award demonstrates DocuSign's commitment to making your DocuSigning experience safe and secure.

Qualifications and Certifications: Security members hold professional certifications including CISSP, CISM, CRISC, CSSLP, CASS, GSEC SANS, CCNA Security, GCIH - GIAC Certified Incident Handler, GIAC-GPPA; Privacy, Security+, Linux+, A+, and Network+, BCERT - Basic Computer Evidence Recovery (US Gov't); ACERT - Advanced Computer Evidence Recovery (US Gov't), ACE AccessData Certified Examiner, ACP - Archer Certified Professional, Mobile/Cell Phone Forensic Expert (XRY), Data Protection Practitioner, CIPP/E- Certified Information Privacy Professional/Europe, CIPP/US- Certified Information Privacy Professional/USA, PMP, Prince2, Prince2 Agile, PSM, MSP, MBA, MA, MSc, and BA in Digital Forensics, Cyber Security (Law Enforcement Level), Computational Science, focus in Cryptography, Security & Forensic Computing, Cybersecurity, and Leadership.

3.1.19 Services and Support

3.1.19.1 Professional services shall be available to assist ONS in developing templates, workflows, integration, user support, and help with other features offered with the product.

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 with the DocuSign Agreement Cloud. Along the way, we also help customers leverage best practices and industry tools, explore high-impact expansion

opportunities, 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

Advantages of DocuSign Services and Support

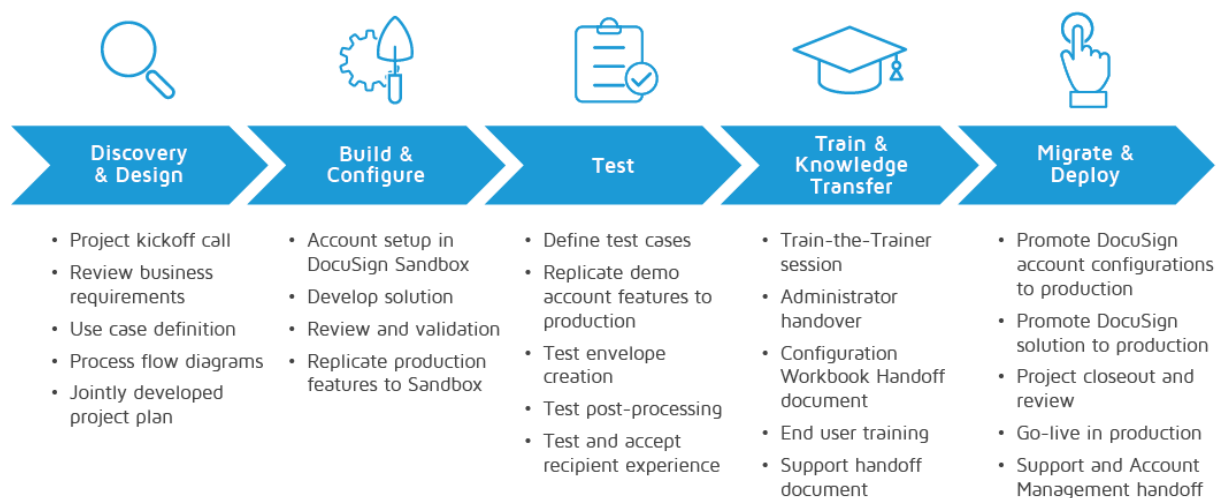
- Achieve key business outcomes digitally
- Increased speed to value
- Minimize risk

Implementation Approach

With more than 1 billion users worldwide, we have the experience to help chart your course with a straightforward approach to deploying DocuSign. Together, the best-suited combination of implementation services and best practices will help you extract maximum value from your solution and 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



- **Discovery and Design:** Jointly review and validate requirements, processes, forms, documents, data capture, and design considerations for the use case to produce a Solution Design Document for achieving the desired outcome.

- **Build and Configure:** After acceptance of the design, our experts build and configure the solution in a test environment, including the setup of administration controls, user management, branding workflow, and template design.
- **Test:** Our experts provide guidance on test cases, execute user scenario-based testing, and assist with replicating account features and configuration to ensure the solution operates as expected in production.
- **Train & Knowledge Transfer:** Benefit from effective knowledge transfer with our train-the-trainer approach and materials to help accelerate productivity, develop in-house expertise, and increase adoption of DocuSign.
- **Migrate and Deploy:** We empower you to manage the migration from a sandbox to a production environment with a deployment checklist and configuration workbook so you can manage the solution moving forward.

Project Team Structure: All FastStart engagements (two to four week engagements) are led by a single DocuSign Business Consultant. Additional subject matter experts are pulled in to help address and expedite customer-specific questions or requirements on an as-needed basis. For the deployment of more complex solutions, use cases, or integrations, DocuSign will typically have one to four DocuSign resources involved in the project. Below are the key Professional Services roles involved, however, our team can be configured to meet a customer's specific needs. Depending on your specific implementation needs, these roles may be shared among team members. DocuSign highly recommends similar customer roles or counterparts to these roles on your team as well.

- **DocuSign Business Consultant:** This role provides expertise on product functionality and configuration. The DocuSign Business Consultant also has a working knowledge of previous DocuSign implementations over a wide range of market segments. Their involvement will be critical for envisioning possible product solutions or configurations for multiple business requirements.
- **Customer Success Architect:** The Customer Success Architect (CSA) provides strategic and technical leadership on a project. They are a subject matter expert in the electronic signature, systems of agreement, and overall digital transformation programs. CSAs help customers identify and prioritize use cases across the organization as well as offers prescriptive guidance on critical decisions, measuring, analyzing, and presenting the project and program success metrics and ROI analyses to appropriate stakeholders within Subscriber's organization. CSAs also drive adoption initiatives across the enterprise. CSAs are instrumental in ensuring adoption and expansion across the organization.
- **Technical Consultant:** This role will function as the technical resource to address any integration, infrastructure, or security issues/questions that may arise.
- **Project Manager:** The Project Manager will provide overall project oversight and management of the DocuSign resources necessary to support the scope of work for the engagement.

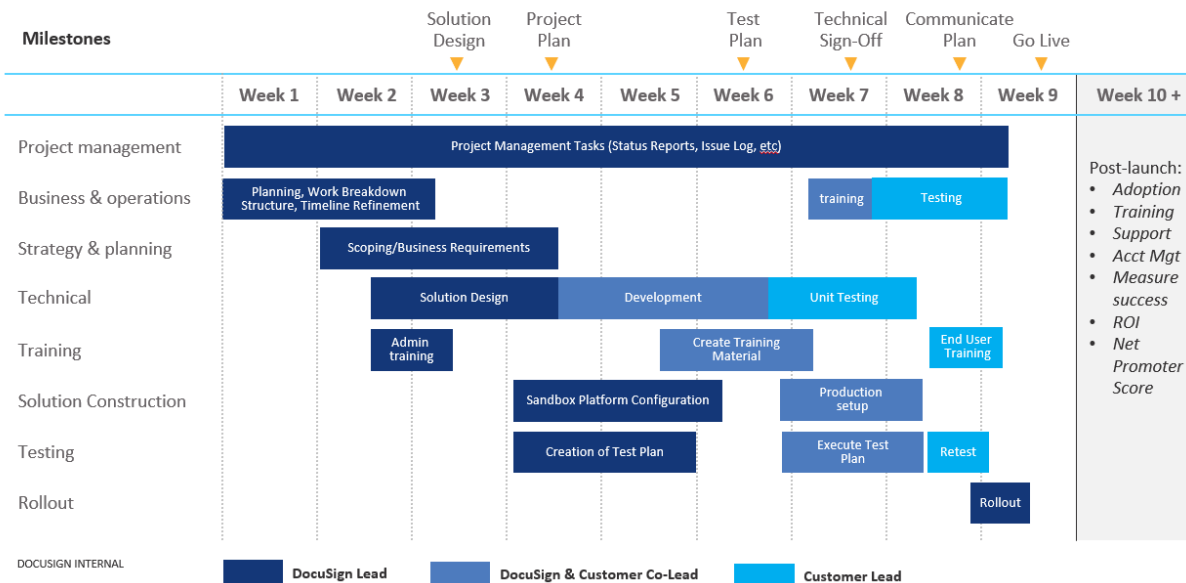
Testing: During the testing and validation stage, the Professional Services Team supports your Quality Assurance team for every aspect and phase of testing, including Unit Testing of DocuSign configurations, end-to-end and User Acceptance Testing (UAT) assistance and support, as well as customer oversight and support to develop a test plan.

Deployment

Project Timelines: Historically, DocuSign customers that go through a FastStart implementation, a two to four week accelerated deployment of a single DocuSign use case, experience accelerated time to value. Additionally, these customers also benefit from direct access to our implementation experts and best practices, resulting in an optimized solution that increases end-user adoption and workforce productivity.

Implementation times may vary for custom solutions, but on average, the implementation timeline for an Enterprise customer is approximately 10 weeks. This timeline depends on your business readiness, communication planning, integration needs, resource availability, size of the deployment, how quickly decisions can be made on open issues, and the overall solution design. The below sample project plan is simply an illustrative representation of our standard process. Project timelines are subject to adjustment based on the type of engagement and complexity of the solution being implemented for a customer.

What does a Typical Deployment Look Like?



3.1.19.2 Support shall be available Monday through Friday, 8:00am to 5:00pm Eastern Standard Time excluding West Virginia State holidays.

DocuSign Customer Support enables you to choose the right level of ongoing assistance so you can get the value you need from our platform. Our industry-leading global support model is there to back you up, no matter where you are or how you want to engage, whether it's on the web, via online case management, or our team of dedicated technical support professionals on-hand 24/7 who know your solution inside and out. We offer four levels of customer support: Standard, Plus, Premier, and Enterprise. There are many ways, including online support cases, email or web communities, and Knowledge Base, for customers and employees who want to escalate customer issues to contact Customer Support depending on their purchased service-level package or the urgency of an issue. Additionally, ONS can provide the case number, contact name, and phone number to your dedicated Account Team, and they will escalate as necessary.

DocuSign Support Center: The DocuSign Support Center is a free resource that provides a comprehensive library of reference documents and videos to take you step-by-step through the process. DocuSign's Support Center also includes a Case Management dashboard for logged-in users. See here to learn more: <https://support.docusign.com/>.

Other Self-Service Support Resources: You'll also benefit from on-demand access to an extensive digital library of self-service resources, including an active support community, extensive knowledge base, product video tutorials, and current release notes. All in all, we strive to maintain a high standard of service and expert advice for a growing community of satisfied customers.

- **DocuSign Support Community (<https://support.docusign.com/forum>):** An online forum where you can access help, ask questions, and collaborate with other DocuSign customers. Community Moderators review posts to make sure they are helpful and appropriate.
- **Knowledge Market (<https://support.docusign.com/en/knowledgemarket>):** Provides tools and tips on how to drive adoption of DocuSign. Some of the available resources include white papers, value studies, videos, and tools.
- **DocuSign University Learning Portal (<https://support.docusign.com/en/docusignuniversity>):** A self-service learning tool utilized by customers throughout their DocuSign journey, beginning with your onboarding experience to becoming a DocuSign expert. Users can browse self-paced learning paths and curated courses by role and type as well as have access to DocuSign's entire training catalog.

Customer Support Plans: 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 that's through our communities, knowledge base and on-demand training, or team of experienced technical support professionals who know you and your solutions. We're also set up to work the way you want, whether by phone, chat, email, or web.

Support Services Explained

- **Global Emergency Support:** Emergency support offered to our Premier and Enterprise Premier support levels with their own SLAs for Severity 1 technical incidents.
- **DocuSign Support Center:** Resource to search for answers and submit Support requests.
- **System Availability Monitoring:** DocuSign Trust Site for real-time system status and notifications.
- **Online Case Management:** Keep tabs on the status of open Support requests and submit cases online for assistance from our Support Team.
- **Phone Support (Callback):** Log a case and customer support will promptly call you back to address technical questions, billing inquiries and account management.
- **Technical Support:** Direct access to technical support teams for configuration-specific questions.
- **DocuSign Integration Support (Connectors):** Support for connections to complementary solutions such as Salesforce, Microsoft, and Google.
- **Proactive Case Monitoring:** Ongoing tracking and review of cases opened to identify trends, possible issues, or opportunities for the improved use of DocuSign.
- **Technical Customer Support Manager:** First point of contact for all technical questions, trained in customer use cases, workflows, and technology, and will provide case reviews regularly as part of the relationship. This service is available to customers starting at \$20K.

- **DocuSign eSignature Administration Course:** CSA Certification course for one user through DocuSign University, two hours of office hour access to the DocuSign CSA team, and access to Adoption Network gated community.
- **Support Business Hours (non-emergency):** eSignature support is available 24/7 in English. Refer to global business hours table above for all support hours and languages.

3.1.20 Training and Education

3.1.20.1 *Online Self-Paced Classes and Training shall be included.*

DocuSign offers to provide a selection of training as SCORM files that can be integrated into the customer's learning portal.

Training is available for all user types. DocuSign offers a wide variety of training services for both administrators and users including online webinars with live trainers, online 1:1 training sessions with live trainers, online video training, and onsite classroom sessions. We generally try to provide "train the trainer" sessions for our customers so they are equipped to train at will within their companies. DocuSign has standard training materials that can be leveraged by its customers as well. DocuSign offers training on-site or virtually.

Maximize your DocuSign rollout success with experienced instructors in a convenient virtual format. DocuSign University's End User Training allows your organization to leverage experienced instructors to support your successful roll-out through tailored virtual training. After DocuSign's Onboarding Success Consulting team onboards your Administrators, DSU's instructors develop and deliver customized virtual training sessions to prepare your company's DocuSign users with basic skills.

End-User Training is ideal for large companies or departments looking to increase DocuSign adoption with a broad user group or complicated rollout.

- Basic DocuSign Skills
- Custom Integration Rollout
- DocuSign Mobile Tools
- Targeted Advanced Training
- Q&A "Office Hours"

Support & Self-Service Resources

DocuSign Customer Support gives you the ability to choose the right level of ongoing assistance you need to get the value you expect from our platform. Our industry-leading global support model is there to back you up, no matter where you are or how you want to engage – whether it's on the web, via online case management, live chat, phone, or our team of dedicated technical support professionals on-hand 24/7, who know your solution inside and out.

DocuSign Support Center: A free resource that provides a comprehensive library of reference documents and videos that take you step-by-step through the process. DocuSign's Support Center also includes a Case Management dashboard for logged-in users. See more here: <https://support.docusign.com/>.

Other Self-Service Support Resources

You'll also benefit from on-demand access to an extensive digital library of self-service resources, including an active support community, an extensive knowledge base, product video tutorials, and current release notes. At the end of the day, we strive to maintain a high standard of service and expert advice, resulting in a growing community of satisfied customers.

- **DocuSign Support Community:** An online forum where you can access help, ask questions, and collaborate with other DocuSign customers. Community Moderators review posts to make sure they are helpful and appropriate. Learn more here: <https://support.docusign.com/forum>.
- **Knowledge Market:** Provides tools and tips on how to drive the adoption of DocuSign. Resources include white papers, value studies, videos, and tools. More information is available here: <https://support.docusign.com/en/knowledgemarket>.
- **DocuSign University Learning Portal:** A self-service learning tool utilized by customers throughout their DocuSign journey – beginning with your onboarding experience all the way to becoming a DocuSign expert. Users can browse self-paced learning paths and curated courses by role and type as well as have access to DocuSign's entire training catalog. See here for more: <https://support.docusign.com/en/docusignuniversity>.

DocuSign's Customer Results

- > 1,000 customers & partners have completed certification
- 96% found training worthwhile
- 95% would recommend the course
- 88% rated that their training experience will be useful in their work
- 74% reported an increase in the company's use of specific features covered in the course

3.1.20.2 Online self-paced General User instruction shall be available for all ONS and Outside Users that are included in the transaction process. This can be through videos or online content.

DocuSign offers a broad set of training programs designed to meet your individual needs:

Support & Self-Service Resources: *Resolve issues faster to accelerate your business*

DocuSign Customer Support gives you the ability to choose the right level of ongoing assistance you need to get the value you expect from our platform. Our industry-leading global support model is there to back you up, no matter where you are or how you want to engage – whether it's on the web, via online case management, live chat, phone or our team of dedicated technical support professionals on-hand 24/7, who know your solution inside and out.

DocuSign Support Center:

The DocuSign Support Center (<https://support.docusign.com/>) is a free resource that provides a comprehensive library of reference documents and videos which take you step-by-step through the process. DocuSign's Support Center also includes a Case Management dashboard for logged in users.

Other Self-Service Support Resources:

You'll also benefit from on-demand access to an extensive digital library of self-service resources including an active support community, an extensive knowledge base, product video tutorials, and current release

notes (<https://support.docusign.com/en/releasenotes>). At the end of the day, we strive to maintain a high standard of service and expert advice which results in a growing community of satisfied customers.

DocuSign Support Community: An online forum where you can access help, ask questions, and collaborate with other DocuSign customers. Community Moderators review posts to make sure they are helpful and appropriate. Please see more information here <https://support.docusign.com/forum>

Knowledge Market: Provides tools and tips on how to drive adoption of DocuSign. Some of the available resources are white papers, value studies, videos, and tools. Please see more information here <https://support.docusign.com/en/knowledgemarket>.

DocuSign University Learning Portal: A self-service learning tool utilized by customers throughout their DocuSign journey – beginning with your onboarding experience all the way to becoming a DocuSign expert. Additionally, using our tiered learning subscriptions, users can browse self-paced learning paths and curated courses by role and type, as well as have access to DocuSign’s entire training catalog. Please see more information here: [DocuSign University \(Full Course Catalog\)](#)

DocuSign Expertise Recognition Program: Designed to accelerate our customer, employee and partner’s digital transformation by providing them with the tools to become an Agreement Expert. From DocuSign eSignature to DocuSign CLM, we have badges available that pertain to a range of Agreement Cloud products. Please see more information here <https://support.docusign.com/articles/credentials>.

3.1.20.3 *This training shall be available during the life of the contract.*

Yes, this training is always available.

3.1.20.4 *Online Instructor Lead Training may be available.*

Training is available for all user types. DocuSign offers a wide variety of training services for both administrators and users including online webinars with live trainers, online 1:1 training sessions with live trainers, online video training, and onsite classroom sessions. We generally try to provide "train the trainer" sessions for our customers so they are equipped to train at will within their companies. DocuSign has standard training materials that can be leveraged by its customers as well. DocuSign offers training on-site or virtually.

3.1.20.5 *Online Instructor Lead Training shall be optional at the Agency's discretion if offered.*

Training is available for all user types. DocuSign offers a wide variety of training services for both administrators and users including online webinars with live trainers, online 1:1 training sessions with live trainers, online video training, and onsite classroom sessions. We generally try to provide "train the trainer" sessions for our customers so they are equipped to train at will within their companies. DocuSign has standard training materials that can be leveraged by its customers as well. DocuSign offers training on-site or virtually.

3.1.21 Cost

3.1.21.1 Vendor shall provide monthly pricing as indicated on Pricing Page for all services that are to be provided under this contract. All costs shall be included in pricing.

DocuSign pricing, including all costs, provided on Pricing Page.

3.1.21.2 Vendor shall include the price for all software products necessary to meet the requirements included in this solicitation. All costs shall be included.

All necessary software products and costs associated to meet the requirements in this solicitation are included.

4. CONTRACT AWARD

4.1 Contract Award: The Contract is intended to provide Agency with a purchase price for the Contract Services. The Contract shall be awarded to the Vendor that provides the Contract Services meeting the required specifications for the lowest overall total cost as shown on the Pricing Page in wvOasis.

Acknowledged

4.2 Pricing Page: Vendor should complete the Pricing Page by electronically entering the pricing information into the commodity section of wvOasis
Vendor should complete the Pricing Page in full as failure to complete the Pricing Page in its entirety may result in Vendor's bid being disqualified.

We have completed the pricing in wvOasis.

5. PERFORMANCE

Vendor and Agency shall agree upon a schedule for performance of Contract Services and Contract Services Deliverables, unless such a schedule is already included herein by Agency. In the event that this Contract is designated as an open-end contract, Vendor shall perform in accordance with the release orders that may be issued against this Contract.

We agree.

6. PAYMENT

Agency shall pay for services monthly upon invoicing by the Vendor, as shown on the Pricing Pages, for all Contract Services performed and accepted under this Contract. Vendor shall accept payment in accordance with the payment procedures of the State of West Virginia.

We agree.

7. TRAVEL

Vendor shall be responsible for all mileage and travel costs, including travel time, associated with performance of this Contract. Any anticipated mileage or travel costs may be included in the flat fee or hourly rate listed on Vendor's bid, but such costs will not be paid by the Agency separately.

We agree.

8. FACILITIES ACCESS

Performance of Contract Services may require access cards and/or keys to gain entrance to Agency's facilities. In the event that access cards and/or keys are required:

- 8.1. Vendor must identify principal service personnel which will be issued access cards and/or keys to perform service.*
- 8.2. Vendor will be responsible for controlling cards and keys and will pay replacement fee, if the cards or keys become lost or stolen.*
- 8.3. Vendor shall notify Agency immediately of any lost, stolen, or missing card or key.*
- 8.4. Anyone performing under this Contract will be subject to Agency's security protocol and procedures.*
- 8.5. Vendor shall inform all staff of Agency's security protocol and procedures.*

We agree.

9. VENDOR DEFAULT

- 9.1. The following shall be considered a vendor default under this Contract.*
 - 9.1.1. Failure to perform Contract Services in accordance with the requirements contained herein.*
 - 9.1.2. Failure to comply with other specifications and requirements contained herein.*
 - 9.1.3. Failure to comply with any laws, rules, and ordinances applicable to the Contract Services provided under this Contract.*
 - 9.1.4. Failure to remedy deficient performance upon request.*
- 9.2. The following remedies shall be available to Agency upon default.*
 - 9.2.1. Immediate cancellation of the Contract.*
 - 9.2.2. Immediate cancellation of one or more release orders issued under this Contract.*
 - 9.2.3. Any other remedies available in law or equity.*

We agree.

10. MISCELLANEOUS

10.1 *No Substitutions: Vendor shall supply only Contract Items submitted in response to the Solicitation unless a contract modification is approved in accordance with the provisions contained in this Contract.*

10.2 *Contract Manager: During its performance of this Contract, Vendor must designate and maintain a primary contract manager responsible for overseeing Vendor's responsibilities under this Contract. The Contract manager must be available during normal business hours to address any customer service or other issues related to this Contract. Vendor should list its Contract manager and his or her contact information below.*

Contract Manager: Tony Striner

Telephone Number: 571.662.3432

Fax Number: 703.871.8505

Email Address: Tony.Striner@Carahsoft.com

IN SUMMARY

Carahsoft Technology Corporation and DocuSign appreciate the opportunity to offer this solution for the State's initiative.

The Carahsoft Team has proposed a superior and cost-effective solution that fully complies with the State's requirements set forth in Digital Transaction Management and eSignature Subscription Solicitation Number: CRFQ 0506 WIC2200000001. 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 State of West Virginia on this project.