↳ **[TO-665]** DocuSign Clean Up/Process Improvement Created: 06/Mar/24 Updated: 07/May/24

Status:	TICKET RESOLVED
Project:	Technology Operations Board
Components:	None
Fix versions:	None
Parent:	Process Requests

Type:	Submit a request or incident	**Priority:**	Medium
Reporter:	Jasmine Sekhon	**Assignee:**	Solounge Bowen
Resolution:	Unresolved	**Votes:**	0
Labels:	None		
Remaining Estimate:	0 minutes		
Time Spent:	1 hour		
Original estimate:	Not Specified		

Request participants:	None
Organizations:	None
Vendor / Issue Type:	Process Improvement
Key Performance Indicator:	Data Capture Rate, Data Quality & Safety Improvement, Improved User Experience
KPI Measure:	See Description

Description

Background:

- The EMR system currently employs DocuSign for managing consents for patients, particularly external consents. However, there are challenges with the current setup as users are encountering confusion between templates and envelopes. Additionally, various versions of templates are being used for different purposes, leading to a lack of consistency.
  Next Steps: DocuSign Account - Kind EMR Consent Feature:

  - **Problem:**

    - DocuSign structure is disorganized, causing confusion between templates and envelopes.
    - Users are employing different template versions for distinct purposes.
  - **Goal:**

    - Streamline the DocuSign environment by cleaning up envelopes and templates.
    - Categorize templates into specific buckets for better organization.
    - Emphasize the use of templates over contracts for uniformity.
    - Remove unused or outdated templates to declutter the system.
    - Needs a Clinic Admin account and a Clinical Account
  - **Process:**

    - Implement a setting that prevents users from creating new templates temporarily to facilitate the cleanup process.
      - Create a system implementation form
        - Jamie would have access to Jira
  - **Schedule:**

    - Arrange a meeting with Jaimie Delrosario to review DocuSign documents and discuss necessary changes.
    - Meeting scheduled for 3/6/24.

Next Steps:

1. Identify and document the current templates and envelopes in the DocuSign account.
2. Categorize templates into buckets based on their purpose and usage.
3. Establish a process to use templates consistently over contracts.
4. Delete templates that are not in use or are outdated.
5. Implement a setting to prevent users from creating new templates temporarily.

6. Schedule and conduct a meeting with Jaimie Delrosario on 3/8/24 to review and finalize DocuSign changes.

References:

- **Note:** Ensure that any changes made during this process are communicated effectively to the relevant stakeholders, and document the updated procedures for future reference.
- https://account.docusign.com/username
- Group Distribution Emails
- https://docs.google.com/document/d/1k5yMfQgzLfdWwWWjbPJQxMr-a930tQ7n0OCUHwv-R14/edit#heading=h.y0ubgrw1l1yt

KPIs Impacted:

1. **Document Processing Time:**

   - Improvement in the efficiency of processing consent documents and other related forms after the cleanup may lead to a reduction in the overall document processing time.

2. **User Productivity:**

   - Streamlining the DocuSign environment and ensuring consistency in the use of templates can enhance user productivity by reducing the time spent searching for the right templates and avoiding confusion between versions.

3. **Error Rates:**

   - The cleanup process aims to remove outdated or unused templates, which can contribute to a reduction in errors related to the use of incorrect or obsolete documents.

4. **Compliance and Consistency:**

   - Improved organization and categorization of templates may positively impact compliance metrics, ensuring that the correct and up-to-date documents are used consistently.

5. **Template Utilization:**

   - Monitoring the usage of templates over contracts can provide insights into the adoption of best practices and adherence to the standardized template usage policy.

6. **System Resource Utilization:**

   - Depending on the scale of the cleanup, there may be impacts on server load, storage utilization, and other system resources. Monitoring these metrics can help ensure the system remains efficient.

7. **User Satisfaction:**

   - Assessing user feedback and satisfaction levels after the cleanup can provide valuable insights into the success of the initiative in addressing user concerns and improving the overall experience with DocuSign.

8. **Audit Trail Accuracy:**

   - The cleanup process may impact the accuracy and reliability of the audit trail within DocuSign. Monitoring this KPI ensures that the system continues to provide a comprehensive and accurate record of document transactions.

Comments

Comment by Jasmine Sekhon [08/Mar/24]

Meeting with Jamie:

- Updated forms in Folders: Current Consents & Current Packets
- Do Not Use: Archived and outdated docs
  - Jamie to add Archived folder for essential documents that cannot be deleted
  - Jamie to move documents from Do Not Use to the new Archived folder
- Jasmine Sekhon follow up:

  - Follow up with Hina regarding finance DocuSign account
    - Check if there are separate DocuSign accounts for finance and clinical
  - Create two clinical DocuSign accounts (admin and end user)
    - Remove the ability for end users to create new accounts and update access
    - Implement ticketing process updates for forms through the Slack channel
  - Schedule a call with Allison and Jamie on Tuesday 4/12

Comment by Jasmine Sekhon [12/Mar/24]

Per Jamie: Hi! I spoke with Alison re: docusign clean up and a developing a ticketing system. I can begin to go through the DO NOT USE folder and discard but I need to check with Hina re: documents that were created before our dept took over DocuSign. Until she can confirm if she has hard copies of those documents, I do not feel comfortable removing them unless she gives the greenlight on that. As far as older versions of consents that were created by Alison, I can clean out those dated beyond 3 months of their current versions.Regarding the ticketing system - Alison does not want to

be on the tickets, those can be directed to me. If there are content change requests, I can address with her during our team calls. Configuration requests within Docusign would be directed to me. Questions regarding lock outs, 1password related questions would be IT specific. Can the tickets support these things?

Comment by Jasmine Sekhon [12/Mar/24]

Solounge Bowen

Next Steps:

1. **Coordinate with Jaimie Delrosario on a timeline** of Docusign cleanup:

    1. Delete unused or outdated templates
    2. Categorize templates into buckets
    3. Identify Archived documents

2. **Reach out to Docusign for account creation:**

    - Contact Docusign to set up two accounts:
        - **Clinical Account (All Users):**
            - Users cannot edit, delete, or add new templates.
            - Accessible for all users on 1Password.
        - **Clinical Admin Account:**
            - Users (Jaimie, Allison Burrows, Hina, Tech Ops, KAT) can edit, delete, or add new templates.

3. **Create a process for Clinical Staff updates:**

    - Options for Clinical Staff to request updates to consents in Docusign:
        - **Option 1: System Implementation Form and Jira Tickets:**
            - Pros: Track updates, established workflow.
        - **Option 2: Slack Channel for Requests:**
            - Pros: Quicker turnaround time, easy access, transparency.

Comment by Solounge Bowen [26/Mar/24]

Jasmine Sekhon which email should be used for these new account creations since there are existing accounts using it@kindbody.com and clinical@kindbody.com ? Should I just used the existing acciunts and make updates within each one?

Comment by Jasmine Sekhon [26/Mar/24]

- **Clinical Account (All Users): Use Existing email (**clinical@kindbody.com**) and update access to below:**

    - Users cannot edit, delete, or add new templates.
    - Accessible for all users on 1Password.

- **Clinical Admin Account: Create new account (clinicalAdmin@kindbody.con)**

    - Users (Jaimie, Allison Burrows, Hina, Tech Ops, KAT) can edit, delete, or add new templates.

Comment by Solounge Bowen [04/Apr/24]

UPDATE:

- Jira Process created Docusign Consents
    - Link to form

Process Features

- Has a separate portal within the Kindbody Support Page
    - Named "Docusign Consent Request"
- Can receive email request
    - Portal email: **docusign@kindbody.atlassian.net**
- Implemented a ticketing process that is linked to Slack
    - Has an internal chat for her team if needed
        - Slack: internal-docusign_request
    - Has a Request channel for users to make request
        - Slack: #help-docusign_request
        - Further discovered that our Halp JIra subscription has expired so this feature is not available

Comment by Solounge Bowen [06/May/24]

Followed up with Jaimie to see if anything needs to be updated

Comment by Solounge Bowen [07/May/24]

Jaimie confirmed everything has been working smooth and nothing will be needed to update