WITS Partner Engagement Checklist

Department Name:

Process Owner:

Form(s):

1. Business Process Review

☐ Bus. Process Roadmap – current vs ideal (input, output, nodes, triggers)

☐ Data Management – current vs ideal (define data use)

☐ Reporting Requirements – current vs ideal (define metrics and reports)

☐ Query Requirements – current vs ideal

☐ Nodes/Audience – Signers, Senders, Form Managers (identify resource)

2. Technical Tasks

☐ User experience optimization (form flow)

☐ Field identification and control (labels, standards, risks)

☐ Form location and delivery (email, web)

☐ Statement of work

☐ Timeline

3. Support / Training

☐ Form documentation

☐ Designated department form manager

☐ Online Docusign resources

☐ Docusign Admin Training options

☐ UCSD ITS Docusign resources