



State of North Carolina

Office of the State Controller

DAVID T. MCCOY
STATE CONTROLLER

January 9, 2013

MEMORANDUM

TO: Chief Financial Officers

FROM: David McCoy 

SUBJECT: OSC To Hold Automated Travel and Reimbursement Form Webinars

As you may be aware, pursuant to Session Law 2011-0145, House Bill 200, the Office of the State Controller (OSC) entered into a Master Services Agreement (MSA) with DocuSign, Inc., an electronic signature provider. This MSA permits all state agencies to use this contract for automating forms and electronically signing documents. The first enterprise form and process being automated is the State's *Travel and Reimbursement form*. The costs for the automation and processing of the travel and reimbursement form will be covered by this office.

Initial deployments of this effort have begun in the Office of State and Budget Management, Department of the Secretary of State, Office of the State Auditor, the Department of Agriculture, and OSC. After a four-month internal trial of converting OSC's paper travel and reimbursement forms to this electronic process, a review of the effort concluded that the automated workflow was twice as fast in each of the approval steps. In other words, the time to process the travel and reimbursement form was cut in half.

To reach the goal of having all agencies using this automated travel and reimbursement form by the end of this fiscal year, several webinars have been scheduled to serve you and your staff. At each of the webinars, you will see a demonstration of the process, learn how to make modifications for your agency, receive information on the project's timeline, and have an opportunity to ask questions during a Q&A session. The first webinar will take place on January 15th and will begin at 3:00 pm and last one hour. The schedule of webinars include:

- January 15th from 3:00 to 4:00 pm
- January 23rd from 2:00 to 3:00 pm
- February 5th from 10:30 to 11:30 am
- February 13th from 9:00 to 10:00 am

Webinar Location Information

- You can connect to the webinar at <https://its.ncgovconnect.com/automation/>
- The call-in number is 919-233-7038.

We are striving to make this roll out as easy on the agencies as possible, and following the webinar, a few key steps must be completed to be fully prepared to use the automated travel reimbursement form. This includes identifying an administrator and have them schedule a meeting with Charles Richards in OSC in order to:

- Attend DocuSign administrator training, <http://www.docusign.com/support/webinars/admin-training>
- Set up a demo account to test the process; and
- Plan your agencies' roll-out (pilot group and other groups).

If you have questions regarding the project's process, roll-out schedule or any other matters related to this initiative, please contact Ms. Sharon Hayes at 919.707.0491 (email: Sharon.Hayes@osc.nc.gov); or Charles Richards at 919.754.6612 (email: Charles.Richards@nc.gov).

I thank you for your support and partnership as we work together to help make our state government more efficient.

cc: Deputies
Chief Information Officers