



State Personnel Office New Hire Packet on DocuSign

Training & Demonstration



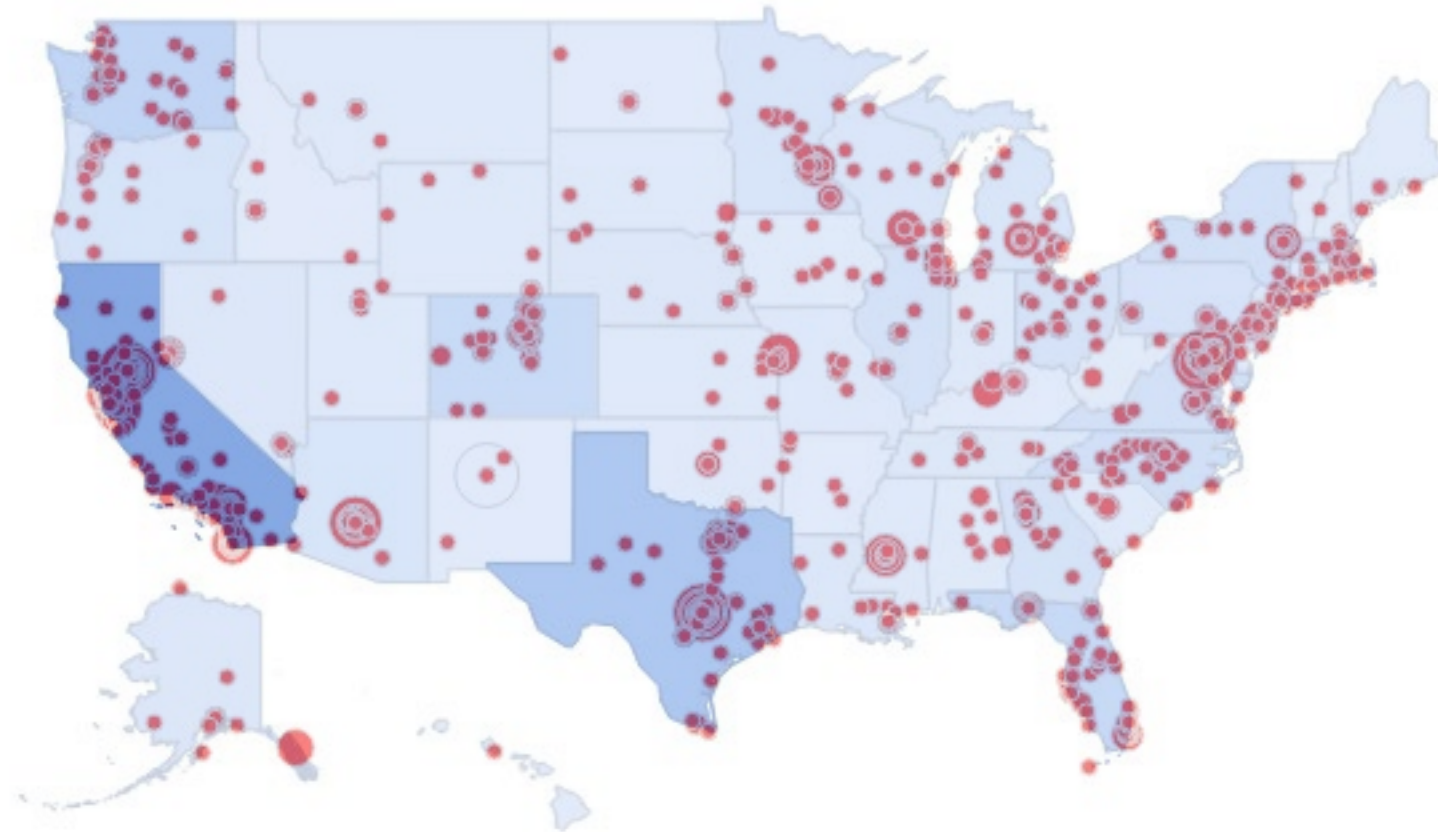
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Agenda

- Public Sector Utilization of DocuSign
- DVR New Hire Experience Value Assessment
- DocuSign Basics
- Getting Access to DocuSign
- New Hire Packet Process in DocuSign
- Demonstration
- Next Steps

Public Sector Utilization of DocuSign



Over **3,000** Federal, State, City, County, and Municipal Organizations

DVR New Hire Experience – Value Assessment



Turnaround Time: 85% reduction

Reduced time to prepare, distribute, manage, process, scan and archive from **62 hours to 9.25 hours** per candidate

Error Rate Reduction: 100% elimination

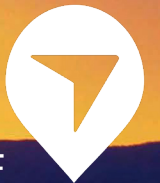
Reduced missing or incomplete candidate documents from **50% to 0%**

Hard Cost Savings: \$24.27 per candidate

Eliminated the need to print, distribute, store and archive physical paper documents

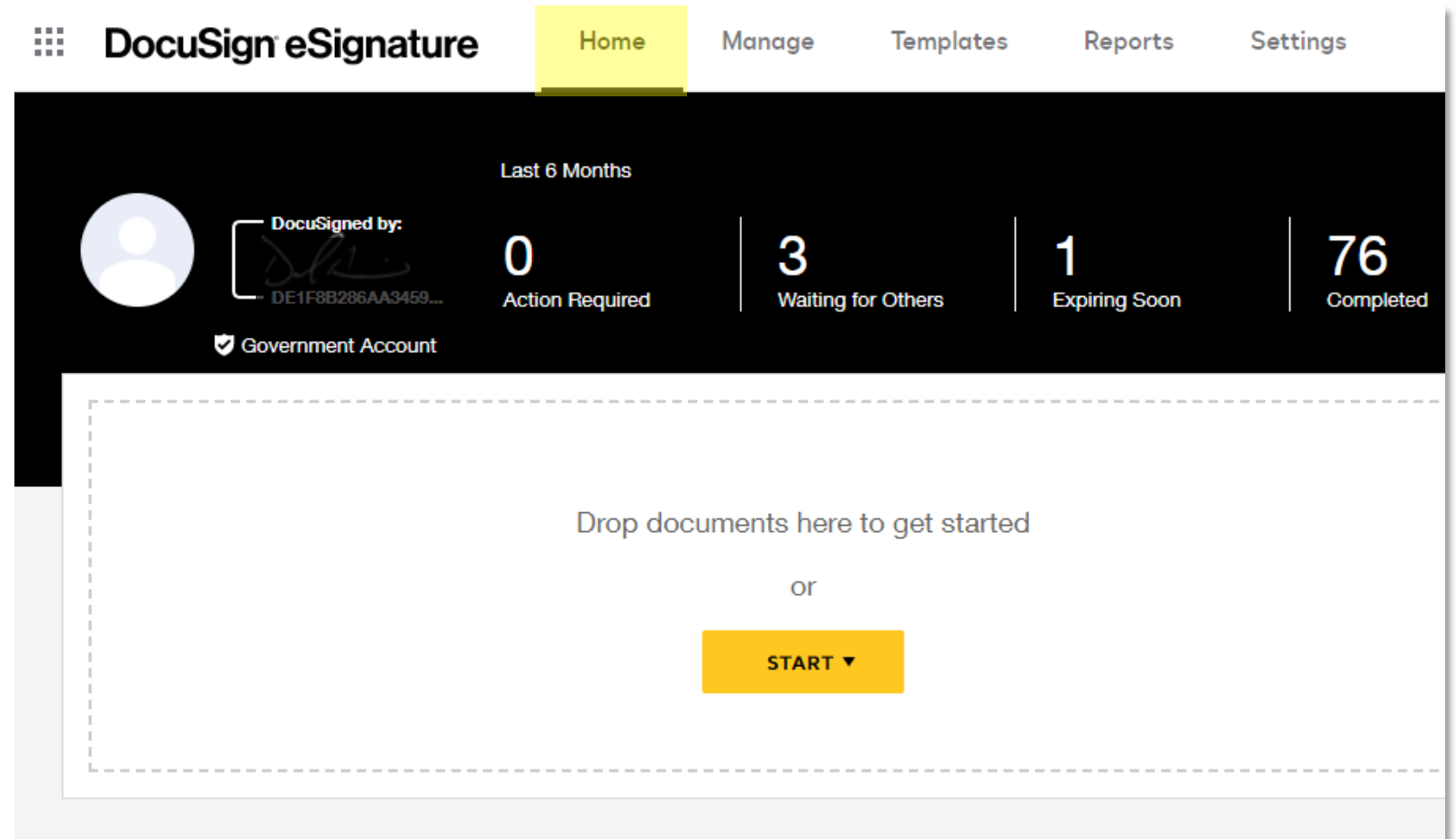
DocuSign Basics

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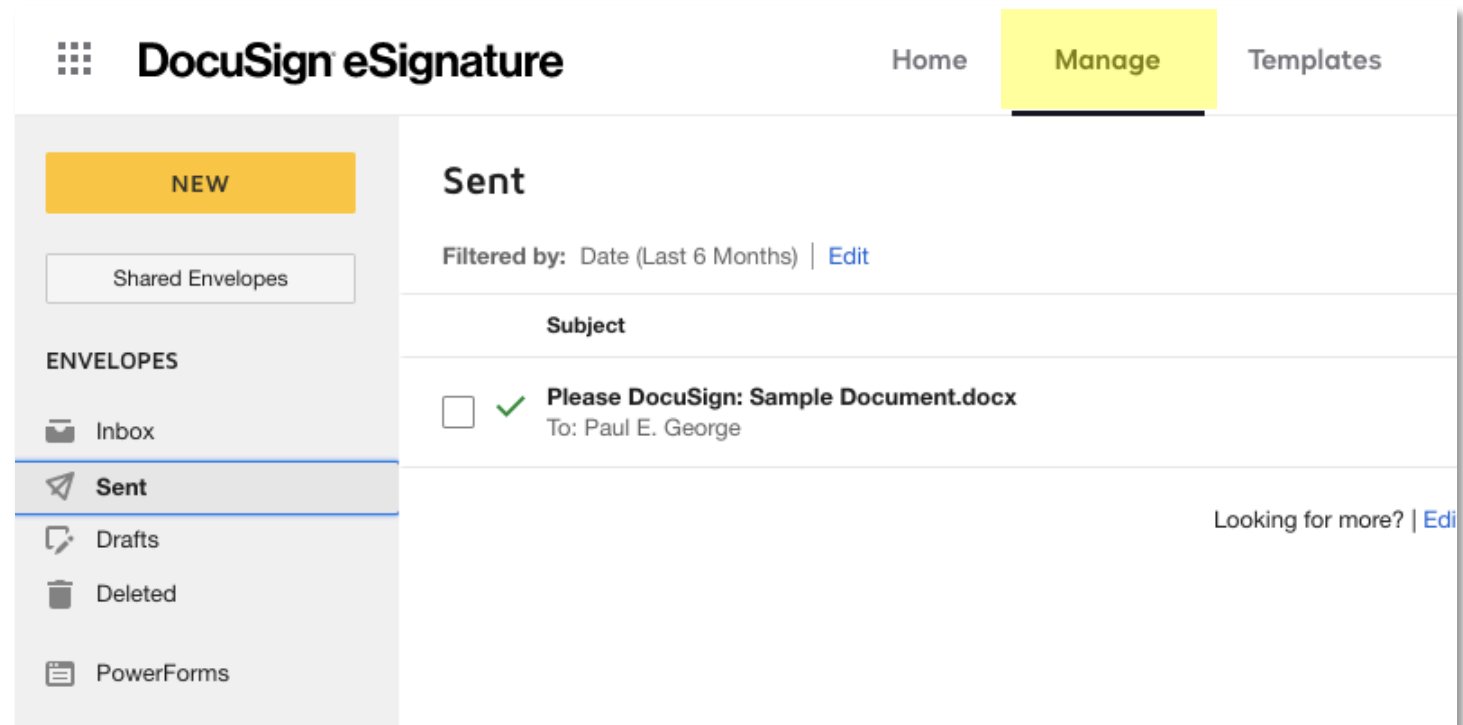
Home in DocuSign

- Landing page of log in
- Overview of envelopes received, sent and completed
- **Start** allows you to create an envelope



Manage Envelopes in DocuSign

- Allows you to see Received and Sent envelopes and take action
- **Inbox** folder contains envelopes you have received and can take action on
- **Sent** folder envelopes can be viewed or managed



Understanding DocuSign Envelopes

An **Envelope** is a container for a DocuSign transaction. Includes sender, recipient(s), documents, fields, delivery progress, and more.

Basic Workflow:

1. Create an Envelope
2. Add Document(s)
3. Add Recipient(s)
4. Add DocuSign Fields
5. Send Envelope
6. Recipient Signs; envelope is routed to additional Signers
7. Email notification sent when envelope Complete



Understanding DocuSign Recipients

- Recipient **Routing Order** defines the order that an envelope is routed
- Each Recipient has a **Role**. Add the Name and Email for each recipient
- Each Recipient has a **Type** that defines what action that recipient is to take

The screenshot displays the DocuSign Recipient Management interface. At the top, there is a checkbox labeled "Set signing order" which is checked. Below this, two recipient cards are shown. The first card is for a recipient with a routing order of 5. It has a "Role" field containing "HR Consultant", a "Name" field, and an "Email" field. To the right of the "Role" field is a dropdown menu labeled "NEEDS TO SIGN". The second card is for a recipient with a routing order of 10. It has a "Role" field containing "Employee", a "Name" field, and an "Email" field. To the right of the "Role" field is a dropdown menu labeled "NEEDS TO SIGN". A purple arrow points from the "Routing Order" text in the first bullet point to the number "5" in the first recipient card. Another purple arrow points from the "Role" text in the second bullet point to the "Role" field in the second recipient card. A third purple arrow points from the "Type" text in the third bullet point to a dropdown menu that is open, showing options: "Needs to Sign", "CC Receives a Copy", "Needs to View", "Specify Recipients", "Allow to Edit", and "Update Recipients". The "Needs to Sign" option is highlighted in the dropdown menu.

DocuSign Fields

- **Fields** are color coded to indicate which recipient should sign, initial or add information
- **Fields** may include validation, to ensure the correct data is being entered

- HR Consultant
- ✓ ● Employee
- HR Consultant
- Supervisor
- Agency Head

BIOGRAPHICAL DETAILS		
Effective Date:	EMPL ID	Social Security Number
Text	Text	Text
First Name	MI	Last Name
Text	Text	Text
Date Of Birth	Birth Country	Birth State
Text	Text	Text
Gender	Educational Level**	Marital Status**
Text	Select	Select As of Date: Text

- None
- SSN
- Email
- Numbers
- Letters
- ✓ Date
- ZIP+4
- ZIP
- Custom

DocuSign Fields, Continued

Required fields have a solid body

- Fields can be **optional** or **required**
- Conditional Logic** can exist that cause fields to appear or disappear based on other field actions
- Field settings and conditional logic have been defined in the template

☐ A. The applicant owes no court-ordered child support obligations.

☐ B. The applicant is delinquent in paying court-ordered child support. Attach a copy of the court order, and describe below the amount and time periods.

Amount:	Time Periods:
Text	Text
Text	Text
Text	Text

*If you circled B, have you gone to court and obtained a court approved agreement for the payment, over time, of all debt stemming from child support obligations?

☐ YES ☐ NO * If yes, attach a copy of the court order.

*Again, if **yes**, are you presently in full compliance? ☐ YES ☐ NO

☐ C. The applicant has an outstanding child support obligation but is paying on time and owes no arrears. List all prior addresses for the last five (5) years:

Dates	Street Address	City, State, Zip
Text	Text	Text
Text	Text	Text

Conditional fields have a hash pattern. Field will appear only when the Signer selects "B"

Optional fields only have a border

DocuSign Templates

- **Templates** help streamline the sending process when you frequently send the same or similar documents or send documents to the same group of people.
- A template contains a document, recipients and fields.
- A template is like a PDF with fillable fields. A DocuSign template also includes envelope routing for the **Recipients** who need to take action.
- Templates have been prebuilt by your team to support your needs.

New Hire Process in DocuSign

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DocuSign & NHP Access

Recipients *do not* need to be a User of a DocuSign account

- Every Recipient **must have** an **Email Address**

To send NHP, **Senders** must have access to send envelopes in the SoNM DocuSign account

- Agency must have an E-Signature agreement completed with DoIT
- To request access, agencies can send an email to EnterpriseSupportDesk@state.nm.us
- To send an envelope, users must have **Sender Access** in DocuSign

New Hire Packet Process in DocuSign


- DocuSign Templates have been created for the New Hire and Employee Transfer processes, along with all separate hiring forms
- HR Consultants will use the appropriate template and send a new DocuSign envelope for each hire
- The HR Consultant begins the new hire packet by filling in their required fields
- Full Process Documentation will be distributed, along with this demonstration

NHP

<input type="checkbox"/>	☆	Transfer Hire Packet Eligible for matching
<input type="checkbox"/>	☆	New Hire Packet (Combined) Eligible for matching
<input type="checkbox"/>	☆	NHP 02 - I-9 Eligible for matching
<input type="checkbox"/>	☆	NHP 04 - Hartford Beneficiary Designation Excluded from matching
<input type="checkbox"/>	☆	NHP 24 - Non-Mandatory Telework Policy Acknowledgm... Excluded from matching
<input type="checkbox"/>	☆	NHP 25 - COVID-19 Mitigation, Self-Screening & Reporti... Excluded from matching
<input type="checkbox"/>	☆	NHP 09 - PERA Beneficiary Designation Excluded from matching
<input type="checkbox"/>	☆	NHP 26 - New Hire Checklist Excluded from matching
<input type="checkbox"/>	☆	NHP 23 - Code of Conduct & Acknowledgment Excluded from matching
<input type="checkbox"/>	☆	NHP 22 - Workers' Compensation Acknowledgment Excluded from matching
<input type="checkbox"/>	☆	NHP 21 - Union Status Excluded from matching
<input type="checkbox"/>	☆	NHP 18 - Leave/Retirement Information Excluded from matching
<input type="checkbox"/>	☆	NHP 10 - Benefits Eligibility Acknowledgment

A large satellite dish antenna is silhouetted against a vibrant sunset sky. The sky transitions from a deep orange near the horizon to a deep blue at the top, with scattered clouds catching the low light. The dish is mounted on a complex mechanical base. In the foreground, a dark silhouette of a desert landscape with a fence line is visible. The overall mood is technological and serene.

Demonstration

The logo consists of a white circle containing a stylized, dark 'N' shape.

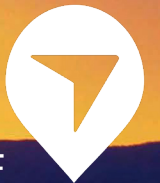
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New Hire Packet - Next Steps

- SPO plans to do a pilot rollout starting Monday, 2/21
 - Pilot will be conducted with agencies including SPO, DoIT, ECECD, & EDD
 - Two Pay Periods
- Open Support Sessions
 - Weekly training/support calls will be available
- To utilize NHP, agencies using E-Signature can request access by contacting EnterpriseSupportDesk@state.nm.us
- HCM Access Required

Signing Up for E-Signature Service

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Signing Up for E-Signature Service

- Agencies can request Service Level Agreement via email to EnterpriseSupportDesk@state.nm.us
- Include the names & emails of:
 - CFO
 - General Counsel
 - Agency Head
- SLA will be dispatched via DocuSign

Agencies Signed up for E-Signature Service


Agency / Department Name	SLA Completion	Comments / Next Steps
Aging & Long-Term Services Department	Signed 2020 Q4	Expansion
Children Youth and Families Department	Signed 2020 Q4	
Commission for the Deaf & Hard of Hearing	Signed 2020 Q4	
Department of Cultural Affairs	Signed 2020 Q4	
Division of Vocational Rehabilitation	Signed 2020 Q4	
Educational Retirement Board	Signed 2020 Q4	
General Services Department	Signed 2020 Q4	
Human Services Department	Signed 2020 Q4	
Indian Affairs Department	Signed 2020 Q4	
New Mexico Higher Education Department	Signed 2020 Q4	
New Mexico Medical Board	Signed 2020 Q4	
NM Commission for the Blind	Signed 2020 Q4	
NM Public Schools Insurance Authority	Signed 2020 Q4	
NM Spaceport Authority	Signed 2020 Q4	
Regulation and Licensing Department	Signed 2020 Q4	
State Investment Council	Signed 2020 Q4	
State Personnel Office	Signed 2020 Q4	
Tourism Dept	Signed 2020 Q4	
Board of Examiners for Architects	Signed 2021 Q1	
Department of Finance and Administration	Signed 2021 Q1	
Department of Health	Signed 2021 Q1	
Developmental Disabilities Planning Council	Signed 2021 Q1	
Early Childhood Education and Care Department	Signed 2021 Q1	
Governor's Commission on Disability	Signed 2021 Q1	
New Mexico Department of Workforce Solutions	Signed 2021 Q1	
NM Environment Department	Signed 2021 Q1	
NM Livestock Board	Signed 2021 Q1	
State Treasurer's Office	Signed 2021 Q1	
Board of Licensure for Professional Eng.	Signed 2021 Q2	
Economic Development Department	Signed 2021 Q2	
Office of the Governor	Signed 2021 Q2	
State Records Center and Archives	Signed 2021 Q2	
Department of Veterans' Services	Signed 2021 Q3	
Public Education Department	Signed 2021 Q4	
NM Retiree Health Care Authority	Signed 2021 Q4	
New Mexico Department of Transportation	Signed 2021 Q4	

Contacts

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A large satellite dish antenna is silhouetted against a vibrant sunset sky. The sky transitions from a deep orange near the horizon to a soft purple and blue at the top. The dish is mounted on a complex metal structure with various ladders and platforms. In the foreground, a dark silhouette of a fence and distant hills are visible.

Thank you.

The logo for the New Mexico Department of Information Technology, featuring a stylized white 'T' inside a white circle.

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