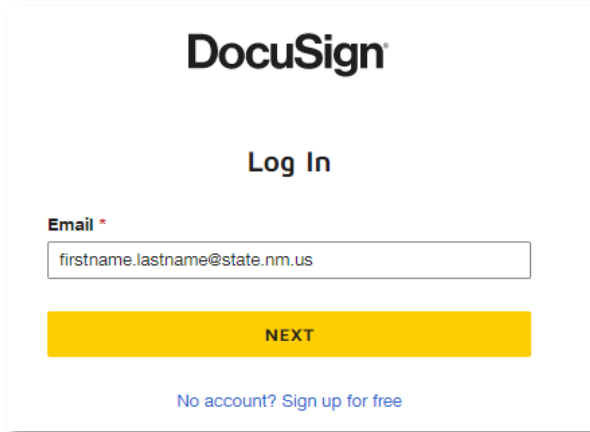


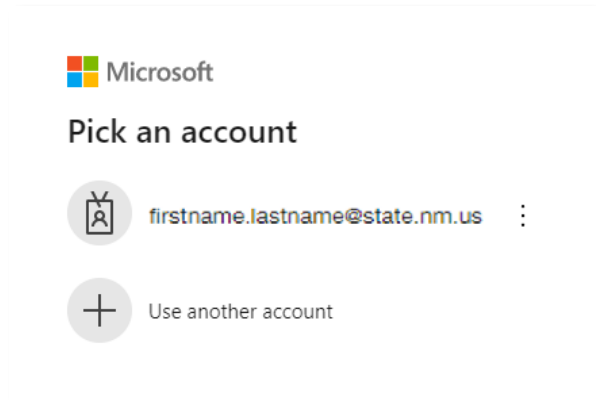
New Hire Packet on DocuSign

Process User Guide

1. Navigate to DocuSign: <https://app.docusign.com/home>
2. Enter your State of NM email address, click **Next**, and select your email account



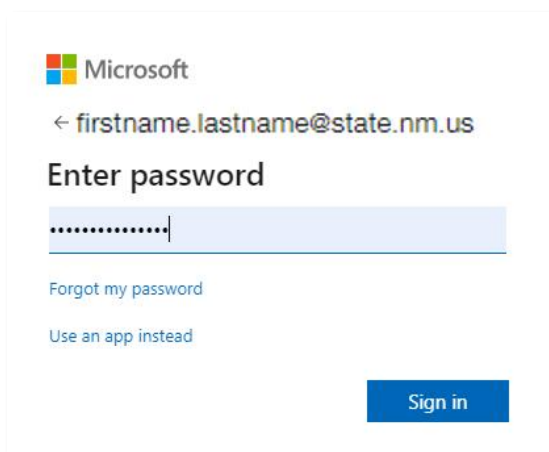
The DocuSign Log In screen features the DocuSign logo at the top. Below it is the text "Log In". There is a text input field labeled "Email *" containing the placeholder text "firstname.lastname@state.nm.us". Below the input field is a large yellow button labeled "NEXT". At the bottom, there is a link that says "No account? Sign up for free".



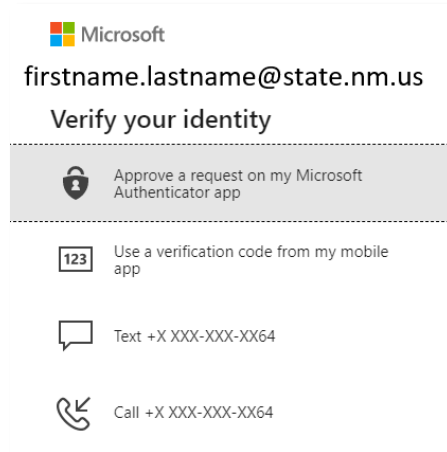
The Microsoft "Pick an account" screen shows the Microsoft logo at the top. Below it is the text "Pick an account". There are two options: a circular button with a person icon and the email address "firstname.lastname@state.nm.us" followed by a vertical ellipsis, and a circular button with a plus sign and the text "Use another account".

3. Enter your email password and click **Sign In**.

If you have multi-factor authentication enabled, complete the steps required to verify your identity.



The Microsoft "Enter password" screen shows the Microsoft logo at the top. Below it is the text "Enter password". There is a text input field with a password mask (dots). Below the input field are two links: "Forgot my password" and "Use an app instead". At the bottom right is a blue button labeled "Sign in".



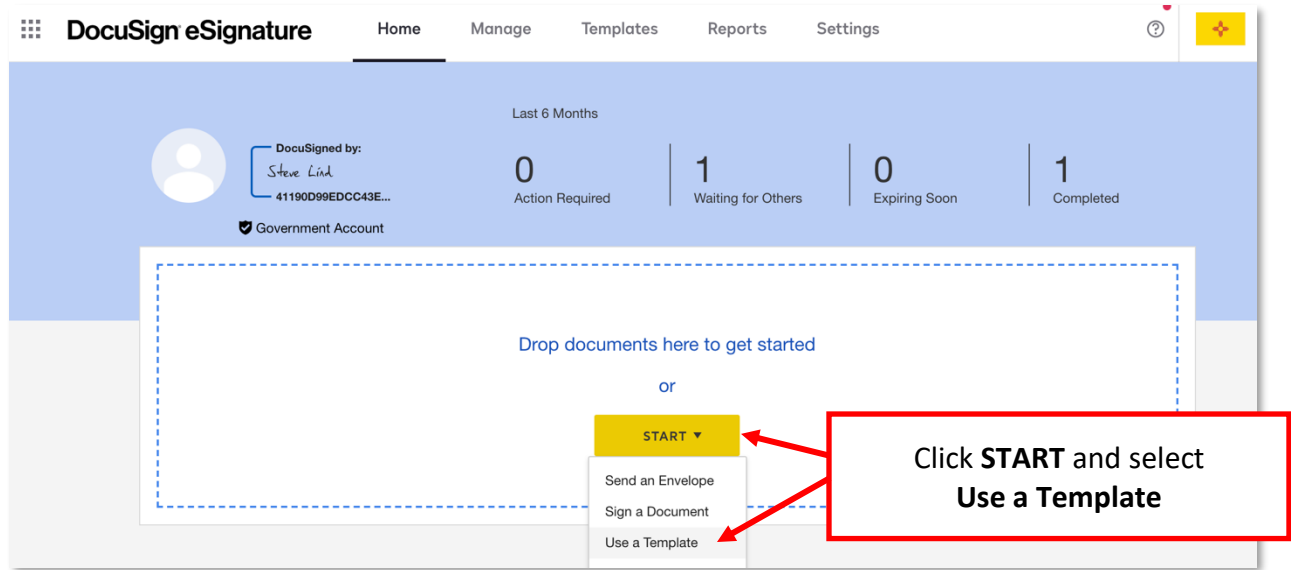
The Microsoft "Verify your identity" screen shows the Microsoft logo at the top. Below it is the text "Verify your identity". There are three options: a button with a shield icon and the text "Approve a request on my Microsoft Authenticator app", a button with a "123" icon and the text "Use a verification code from my mobile app", and a button with a speech bubble icon and the text "Text +X XXX-XXX-XX64". At the bottom is a button with a phone icon and the text "Call +X XXX-XXX-XX64".

4. Click **Yes** or **No** to stay signed in.

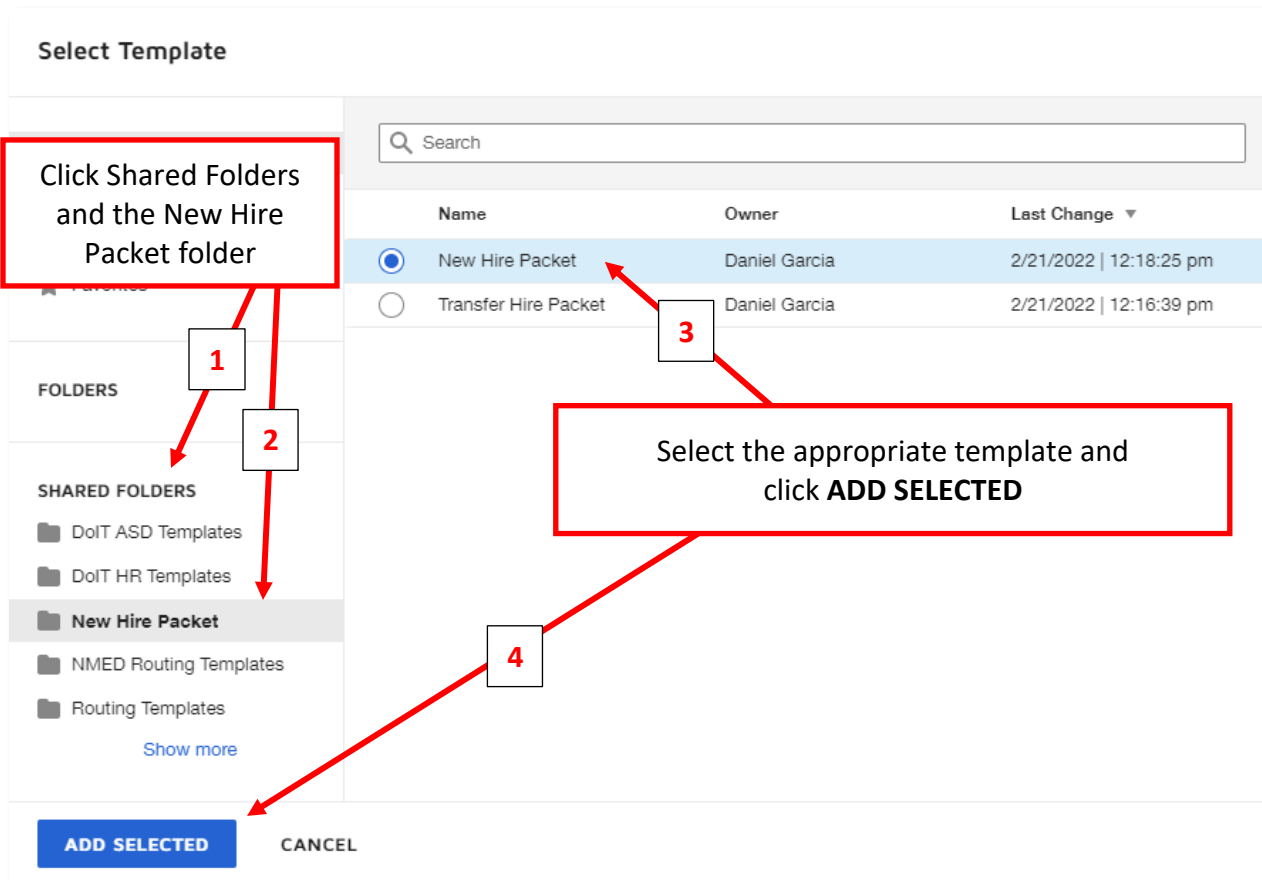


The Microsoft "Stay signed in?" screen shows the Microsoft logo at the top. Below it is the text "Stay signed in?". There is a paragraph of text: "Do this to reduce the number of times you are asked to sign in." Below the text is a checkbox labeled "Don't show this again". At the bottom are two buttons: "No" and "Yes".

5. Click **START** and select **Use a Template**



6. Go to Shared Folders [1], scroll down to the New Hire Packet folder [2], select the New Hire Packet template [3], and click **ADD SELECTED** [4]



7. Enter your name and email as the HR Consultant 1 [1]. Enter the Employee name and email [2]. Enter the name and email of the HR Consultant 2, which may be the same as HR Consultant 1 [3]. Finally, click **SEND** [4]

The screenshot shows the 'New Hire Packet' form with three recipient sections: 'HR Consultant 1', 'Employee', and 'HR Consultant 2'. Each section has 'Name' and 'Email' fields. Red arrows point from numbered callouts to these fields: [1] points to the Name field of HR Consultant 1; [2] points to the Name field of the Employee; [3] points to the Name field of HR Consultant 2; and [4] points to the 'SEND' button at the bottom left. Each recipient section also has a 'NEEDS TO SIGN' status indicator.

HR Consultant 1 NEEDS TO SIGN

Name *

Email *

Employee NEEDS TO SIGN

Name *

Email *

HR Consultant 2 NEEDS TO SIGN

Name *

Email *

SEND **ADVANCED EDIT** **DISCARD**

8. Click **SIGN NOW** to complete the fields assigned to the HR Consultant.

The screenshot shows the 'New Hire Packet (Combine)' form. A modal dialog box is open in the center with the text 'Do you want to sign this document now?'. It has two buttons: 'SIGN NOW' and 'SIGN LATER'. A red arrow points from the 'SIGN NOW' button to a callout box that says 'Click SIGN NOW'. The background shows the 'Recipients' section with 'HR Consultant' listed and a 'NEEDS TO SIGN' status.

Do you want to sign this document now?

SIGN NOW **SIGN LATER**

Click SIGN NOW

9. Click **CONTINUE** to begin filling in the required fields.

Please Review & Act on These Documents

 **Steve Lind**
State of New Mexico (Demo)

Please review and sign your documents. To begin, please click the button below. Signing will not be complete until you have reviewed the enclosed documents and you have confirmed your signatures.
[View More](#)

Please review the documents below.

CONTINUE OTHER ACTIONS ▾

Click **CONTINUE**

10. Click **START** to navigate to the fields that need to be completed. You can also use the **Tab** key to navigate the fields.

Please review the documents below.

START **FINISH**

DocuSign Envelope ID: 22F43867-FB81-4000-9000-000000000000

Click **START**

 **State of New Mexico**
Welcome Letter

Dear

Welcome and congratulations on accepting your new position with the State of New Mexico.

ONLY
LINE SIGNING SERVICE
• Washington 98104 • (206) 219-0200

11. Enter data in the form and click on **FILL IN** (or the Tab button) to get to next required field

FILL IN

Click **FILL IN**

Employee ID Required

Full Name: Employee ID:

Agency:

Hire Date: Agency BU:

12. Click on the **FINISH** button when all field data has been entered

Done! Select Finish to send the completed document.

FINISH OTHER ACTIONS ▾

and "Institution" a reasonable opportunity to act on it prior to depositing to the account.

Employee Name _____ Employee Social Security - -

Address _____

City, State, Zip _____

Work Phone Number _____

Home Phone Number _____ Bank Routing # _____ Checking ☐ Savings ☐
(9 digits) (check one)

Signature/Date _____ Bank Account # _____
(up to 17 digits)

DirectDeposit.pdf 1 of 1

FINISH

Click **FINISH** when complete

13. The hiring packet is now sent to the Employee for them to complete their information. You can monitor envelope status from the **Sent** folder in the **Manage** tab:

DocuSign eSignature

[Home](#)
[Manage](#)
[Templates](#)
[Reports](#)
[Settings](#)

NEW ▾

Shared Envelopes

ENVELOPES

Inbox

Sent

Drafts

Deleted

Sent

Filtered by: Date (Last 6 Months) | [Edit](#)

FILTERS

| Subject | Status | Last Change ▾ |
|--|--|---|
| <input type="checkbox"/> <div> <div>Please DocuSign: State of NM New Hire Packet - Steve Candidate</div> <div>To: Steve Lind, Steve Candidate +1 more</div> </div> | <div> <div></div> <div>0/3 done</div> </div> <div>Need to Sign</div> | <div>2/14/2022 08:36:24 am</div> <div>SIGN ▾</div> |
| <input type="checkbox"/> <div> <div>Please DocuSign: Sample Document.docx</div> <div>To: Steve Lind, Daniel Garcia</div> </div> | <div>Completed</div> | <div>2/8/2022 08:39:54 am</div> <div>DOWNLOAD ▾</div> |

14. Clicking on the envelope subject will show additional detail about the progress of the envelope:

DocuSign eSignature

Home
Manage
Templates
Reports
Settings

Please DocuSign: State of NM New Hire Packet - Steve Candidate ⓘ

Envelope ID

From: Steve Lind

Last change on 2/14/2022 | 08:36:24 am

Sent on 2/14/2022 | 08:35:20 am

Need to Sign

SIGN

CORRECT

MOVE

RESEND

MORE ▾

⬇

📁

Recipients

SIGNING ORDER

| | | CURRENT | |
|----|---|---------|--|
| 5 | <div>Steve Lind</div> <div>stephen.lind@docusign.com</div> | | <div>✍</div> <div>Needs to Sign</div> <div>Viewed on 2/14/2022 08:36:24 am</div> |
| | | WAITING | |
| 10 | <div>Steve Candidate</div> <div>dsilnd.tester+candidate@gmail.com</div> | | <div>✍</div> <div>Needs to Sign</div> |
| | | | |
| 15 | <div>Steve Lind</div> <div>stephen.lind@docusign.com</div> | | <div>✍</div> <div>Needs to Sign</div> |

NHP 01 - Welcom...

Pages: 2

1 of 2

📄

NHP 2 - I-9 2020...

Pages: 3

1 of 3

📄

NHP 3 - W-4.pdf

Pages: 4

1 of 4

📄

15. After the Employee has finished, the envelope will proceed to HR Consultant 2 (same process as Steps 9-12 above). The HR Consultant 2 will complete the I-9 form now that the employee has attached the required documentation, as well as the Benefits Eligibility forms.
16. When the packet is complete, the combined document can be downloaded to your computer.

Download

Select which files you want to download:

☒ All 2 files

☒ Document 1 PDF

☒ Certificate of Completion 1 PDF

☐ Combine all PDFs into one file

DOWNLOAD **CANCEL**

17. HR Consultant will review the Beneficiary Designation form. If the Employee indicated someone other than their spouse, HR will need to contact the Employee and their spouse to obtain additional information.

MARITAL STATUS ☐ NEVER BEEN MARRIED ☐ MARRIED ☒ DIVORCED ☐ WIDOWED

Marriage or divorce after the date this form is completed may revoke your beneficiary designation(s).

SPOUSAL CONSENT

☒ You have selected Spousal Consent. Please contact your Onboarding Administrator to receive the Beneficiary Spousal Consent form. Please complete the form and sign before a notary. Upon completing this form, return to the Onboarding Administrator.

You May Only Choose One Person. You may NOT split

I designate the following person to be my survivor beneficiary to receive a monthly pension payable for life in the event of my death prior to retirement. If I have less than the minimum number of years to meet retirement eligibility when I die, this monthly

18. HR Consultant will also review the Outside Employment Disclosure form. If the Employee indicated they have an outside conflict of interest, complete the secondary process below to obtain approval from the Supervisor and Agency Head as required.

Employee Certification

Check the statement that is applicable to you:

☐ I am currently NOT engaged in outside employment (or in the process of obtaining such) nor do I have a conflict any financial interest in a business which may be affected by the actions of this agency.

☒ I have indicated below any outside employment or conflict of interest pursuant to the provisions of the Governor's Code of Conduct.

☒ Should I have a financial interest either now or in the future which I am required to report to the Secretary of State under the Financial Disclosure Act, I will do so.

Outside Employment

In addition to your position with this agency, are you currently employed or are now arranging for (including consultant work) such outside employment. This agency's division management will make the final determination of approval/denial.

Name of Business: Very Busy Inc.

Address: 123 Main St. City: Santa Fe State: NM Zip Code: 87501

Work Performed: Duties 1, Duties 2, Duties 3

- A. Open the downloaded PDF from Step 16 on your computer and save the Outside Employment Disclosure form only as a single page file
- B. In DocuSign, go to **START > Use a Template > Shared Folders > New Hire Packet > Outside Employment Disclosure Review** and click **ADD SELECTED**
- C. Add the names and emails of the Employee's Supervisor and Agency Head and click **Advanced Edit**
- D. On the document shown, click the menu dots and click **Replace**
- E. Locate the file saved to your computer in step A and click **Open**, then **CONTINUE**
- F. Click **Next** and finally, **Send**