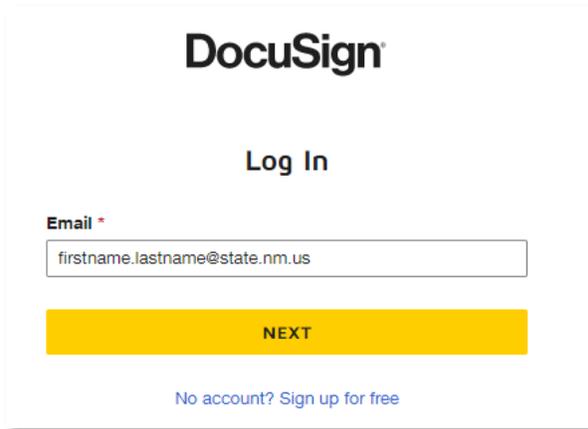


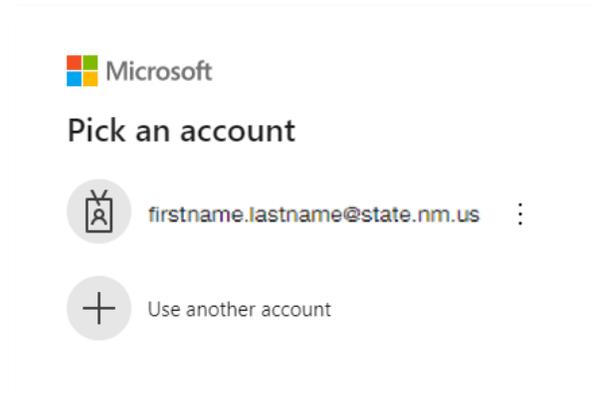
New Hire Packet on DocuSign

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



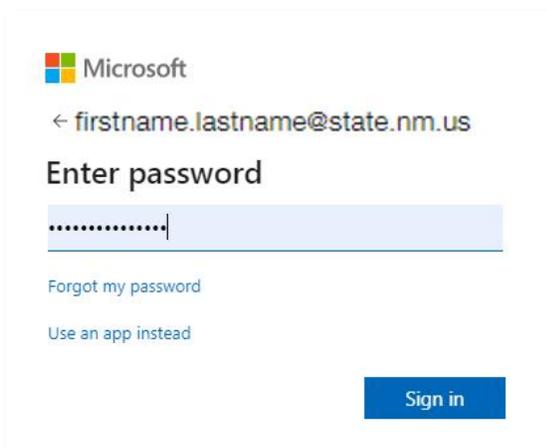
The screenshot shows the DocuSign 'Log In' page. At the top is the DocuSign logo. Below it is the heading 'Log In'. There is a text input field labeled 'Email *' containing the placeholder text 'firstname.lastname@state.nm.us'. Below the input field is a large yellow button labeled 'NEXT'. At the bottom,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



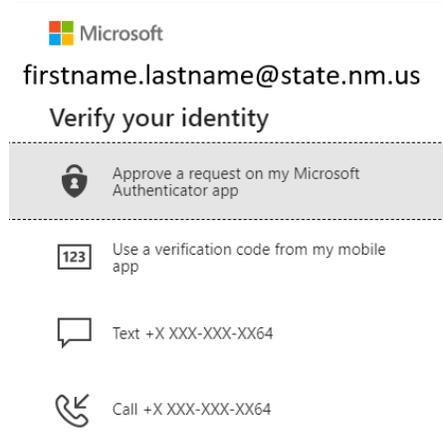
The screenshot shows the Microsoft account selection screen. At the top is the Microsoft logo. Below it is the heading 'Pick an account'. There are two options: a Microsoft account icon with the email address 'firstname.lastname@state.nm.us' and a three-dot menu icon to its right, and a plus sign icon with 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 screenshot shows the Microsoft 'Enter password' screen. At the top is the Microsoft logo. Below it is the heading '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'.



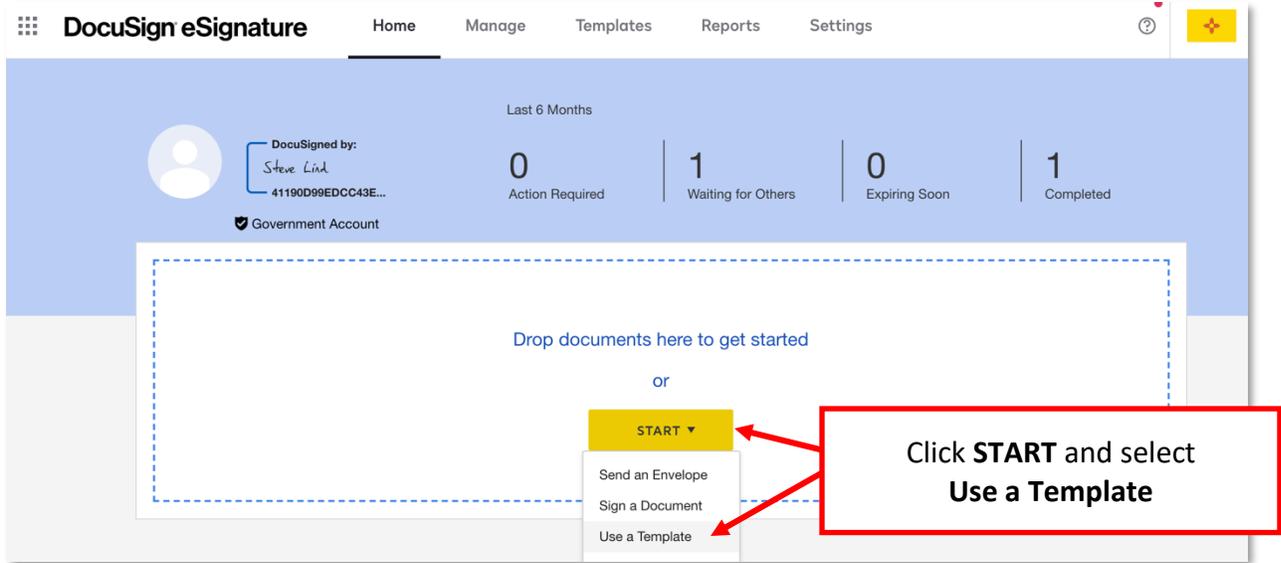
The screenshot shows the Microsoft 'Verify your identity' screen. At the top is the Microsoft logo. Below it is the heading 'Verify your identity'. There are three options: 'Approve a request on my Microsoft Authenticator app' with a shield icon, 'Use a verification code from my mobile app' with a '123'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

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

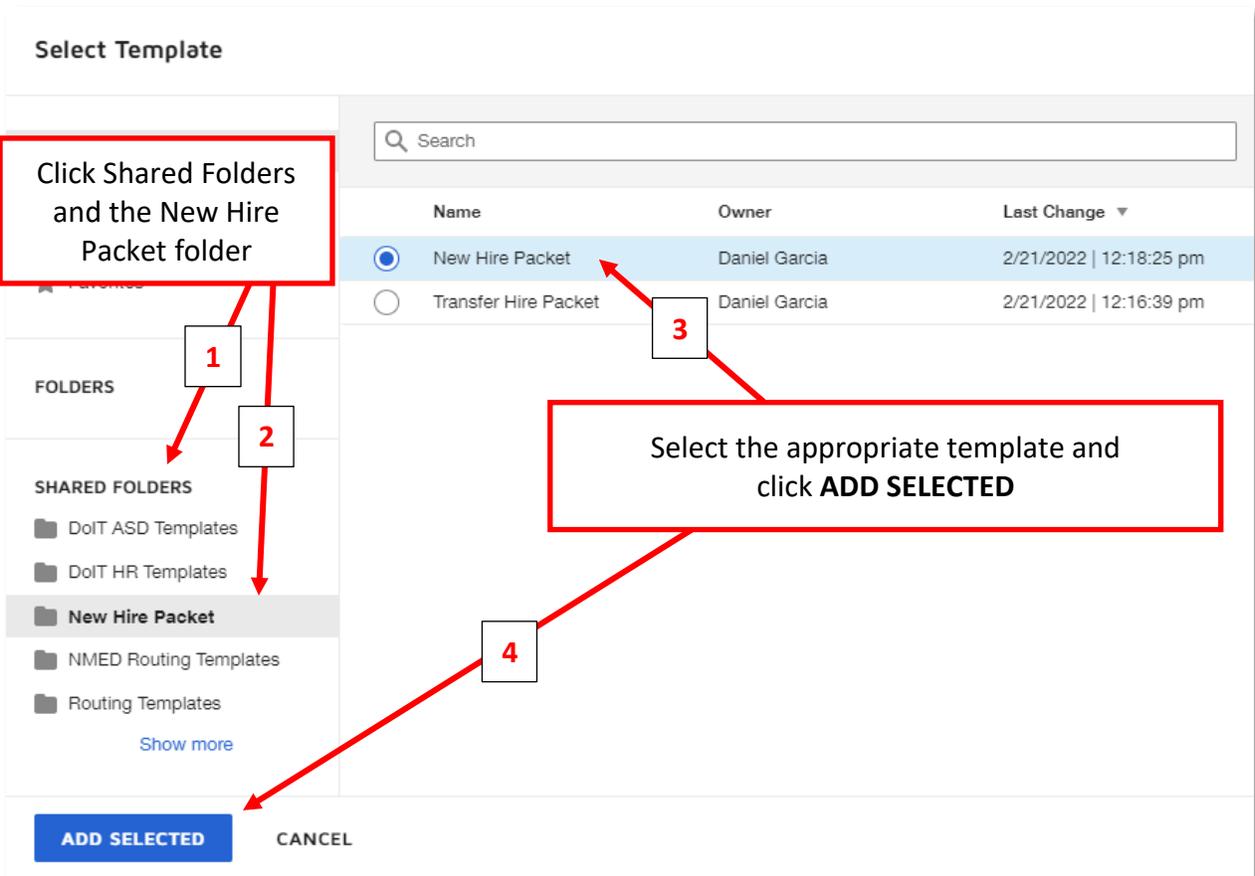


The screenshot shows the Microsoft 'Stay signed in?' screen. At the top is the Microsoft logo. Below it is the heading 'Stay signed in?'. There is a text input field containing the email address 'firstname.lastname@state.nm.us'. Below the input field is the text 'Do this to reduce the number of times you are asked to sign in.' and 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' interface with three recipient sections: 'HR Consultant 1', 'Employee', and 'HR Consultant 2'. Each section has 'Name' and 'Email' fields. A 'NEEDS TO SIGN' indicator is present for each. At the bottom are buttons for 'SEND', 'ADVANCED EDIT', and 'DISCARD'. Red arrows and numbered boxes (1-4) point to the input fields and the 'SEND' button. Explanatory text boxes are provided for each step.

1 Enter your Name and Email as HR Consultant 1

2 Enter the Employee Name and Email

3 Enter the Name and Email of HR Consultant 2. Click **SEND**

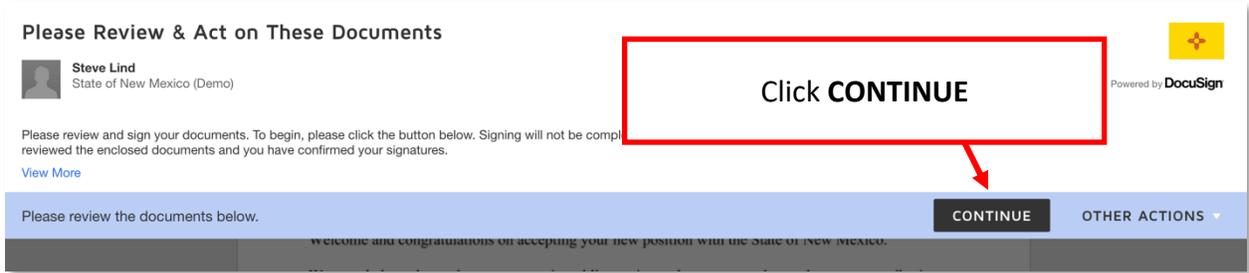
4 Click **SEND**

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

The screenshot shows a dialog box titled 'Do you want to sign this document now?' with two buttons: 'SIGN NOW' and 'SIGN LATER'. A red arrow points from a text box to the 'SIGN NOW' button.

Click **SIGN NOW**

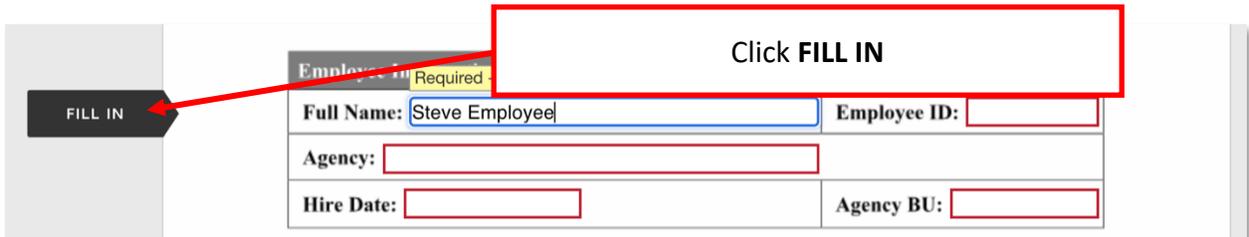
9. Click **CONTINUE** to begin filling in the required fields.



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



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



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.

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.

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.

- 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**