**Temporary Solutions Job Aid – DocuSign Remote Verification**

In this Job Aid, we will be taking you through the steps of completing a Temporary Solutions Onboarding Packet as an HR Representative and I-9 verification remotely. Please reach out to Temporary Solutions for assistance after reviewing this booklet.

We suggest using **Google Chrome** when working through the DocuSign database.

You will be asked to review and complete the following:

1. [Temporary Solutions Guidelines for Remote Employment](#)
2. [How to Attach Agency’s Telework Policy](#)
3. [I-9 Section 2 Completion & Instructions](#)
4. [Viewing I-9 Temporary Employee Document(s)](#)

You may click on each title above to take you to the form on this document.

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**Helpful Tips & Tricks**

- In order to move through each section of DocuSign, you must **click** the **Initial** or **Sign Here** icons.

- The **Next** button only takes you to the **next required area**
  - **Please Note**: You can use the **Tab** button on your keyboard or the **Next** button on the screen in order to move through each section

- If you are unsure what current section of the DocuSign requires, please look at two areas:
  - The **blue banner at the top of the DocuSign page**
  - Hover over the area with your mouse

- You **do not** have to complete your documents all at one time. You can **Finish Later** by clicking the **Other Actions** drop down at the top of your screen
  - For more information about the **Other Actions Dropdown**, please click [here](#)

- If you **do not** have access to a computer, there is a **DocuSign mobile app**
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## DocuSign Notification & Command Icon/Button Descriptions

<table>
<thead>
<tr>
<th>Command Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>START</td>
<td>This button takes the user to the beginning of the document or where the user left off last session.</td>
</tr>
<tr>
<td>Initial</td>
<td>This icon shows the user is required to click the <strong>Initial Arrow</strong> as acknowledgement and agreement of the statement.</td>
</tr>
<tr>
<td>Sign</td>
<td>This notification means this area requires the user to click the <strong>Sign Arrow</strong> as acknowledgement and agreement of the statement.</td>
</tr>
<tr>
<td>REVIEW DOCUMENTS</td>
<td>This button takes the user to the documents that need to be reviewed.</td>
</tr>
<tr>
<td>NEXT</td>
<td>This command icon takes the user to the next required section of the document. This does <strong>not</strong> sign nor initial for the user.</td>
</tr>
<tr>
<td>SELECT</td>
<td>This command icon shows the user this area requires a selection by clicking a radio button from the options provided.</td>
</tr>
<tr>
<td>FILL IN</td>
<td>This command icon shows the user this section needs to be filled in by typing in the blank text box(s).</td>
</tr>
<tr>
<td></td>
<td>This red circle icon instructs users to select a statement/choice.</td>
</tr>
<tr>
<td></td>
<td>This red rectangle icon instructs users this text box requires to be completed.</td>
</tr>
<tr>
<td></td>
<td>This paperclip icon serves the user as a notification a file is required to be attached.</td>
</tr>
<tr>
<td></td>
<td>This paperclip icon means the user’s attachment has uploaded.</td>
</tr>
</tbody>
</table>
You will receive an email from email@docusign.net. If you have not received this, please check your junk and spam folders.

The email will look as shown below:

Please click Review Documents. This should take you to the DocuSign website. The title of the page should be Please Review & Act on These Documents (as shown below).
If the message on your screen is cut off, please click the blue ‘View More’ button (circled in red below).

After reviewing the statement, please click continue (as shown below).
Temporary Solutions Employer DocuSign Booklet – Onboarding & Remote Verification

**Other Actions Drop Down Menu**
Throughout the process you will be given the option to **Continue, Finish, Other Actions** drop down menu (shown below).

![Drop Down Menu]

After clicking the Other Actions, you will see the choices below.

<table>
<thead>
<tr>
<th>Choice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finish Later</td>
</tr>
<tr>
<td>Print &amp; Sign</td>
</tr>
<tr>
<td>Decline to Sign</td>
</tr>
<tr>
<td>Help &amp; Support [i]</td>
</tr>
<tr>
<td>About DocuSign [i]</td>
</tr>
<tr>
<td>View History</td>
</tr>
<tr>
<td>View Certificate (PDF) [i]</td>
</tr>
<tr>
<td>View Electronic Record and Signature Disclosure</td>
</tr>
<tr>
<td>Session Information</td>
</tr>
</tbody>
</table>

**Helpful Tip:** If you are ever lost within DocuSign and/or unsure of what the current section requires, please look at the blue header within DocuSign (as shown below).

![Helpful Tip]

Please review the documents below.
**Temporary Solutions Guidelines for Remote Employment Eligibility Verification (Form I-9)**

After clicking **continue**, you will be brought to the documents completed by your agency’s temporary employee. The first document you are required to **review, and sign** is the **Guidelines for Remote Employment Eligibility Verification (I-9)**.

Please **click** the **start** command button. You will need to then read the **Temporary Solutions Guidelines for Remote Employment Eligibility Verification**.

Please let Temporary Solutions know if you have any questions **after** reading the entire **guidelines document**.

You will see that the temporary employee has already agreed to this document by their signature being provided (as shown below).

After reading and understanding this document, you will be asked to **sign and date** (as shown below).

Please **click** the **sign** icon. The date will automatically populate for you to **today’s date**.

This will prompt the **Adopt Your Initials** to create and confirm the following:

> Your name, initials and signature in DocuSign

**Please Note**: If you have used DocuSign previously your previous selections may already be in place. This is okay.
How to Adopt Your Name, Initials & Signature in DocuSign

In order to sign, provide your initials and more, please confirm the requested information below.

Please Note: In the screenshot below the Temporary Employee confirmed their information.

Please Note: If the Placement Counselor mistyped your name in the request process, you can fix your Full Name and Initials at this time.

If you would like to change the style, draw or upload a specific signature you are able to at this screen.

If you are ok with the current style, please click the Adopt and Initial button (shown below). This confirms your signature and initials.

Your signature will now populate where the sign icon was previously.
**Attaching Copy of Agency’s Telework Policy**

After you have signed and dated to agree that you have reviewed the guidelines, you will be asked to attach a copy of your agency’s teleworking policy. This is a requirement for remote verification.

Please click the yellow paperclip icon to attach the requested telework policy.

![Upload Attachment](image)

***Please Note: If you do not have an agency telework policy on file, please ask your agency’s HR team for the completed template provided by the Office of State Human Resources.***

After clicking the paperclip icon, you will be provided an upload attachment screen (as shown below).

![Upload Attachment](image)

Please click the upload a file button. This will prompt your computer to bring you to your files (as shown below).

![Upload Attachment](image)

Please either double click the document you would like to attach or click once to select and then click open.
If your document uploaded correctly, your screen should look like below.

![Upload Attachment]

If you have uploaded your correct telework policy, please click **done**.

You will now see the **paperclip icon** has updated (as shown below). This means your attachment has saved in DocuSign.

![Attachment Icon]

In order to move to the next section, you may either click the **next** command button or you may scroll through the document.

In this Job Aid, we will click **next**.
I-9 Section 2 Completion Instructions
The screenshot below provides an example of what your DocuSign screen should currently show.

**Please Note:** The yellow framed text boxes are notes in order to assist you with completing the Section 2 completely. These will not affect the credibility of the Section 2 completion.

First, please see the **Last Name, First Name** and **Citizenship/Immigration Status** have been completed for you.

Next, you will need to review the document(s) the temporary employee attached in DocuSign. As stated in the Guidelines for Remote Employment document, you must review these documents prior to completing Section 2.
Below are instructions on how to find the document(s) in DocuSign.

**How to Find the I-9 Section 2 Documents in DocuSign**
You will be able to see the document(s) by scrolling through DocuSign (you will scroll down past the FN Data Gathering Form as shown in screenshot below).

In this Job Aid, the temporary employee attached a **List A Document only**.
Please Note: You may be able to tell what the document is by the title given by the temporary employee (shown in screenshot below). The numbers shown in screenshot below also show you how many pages/documents were submitted within the attachment.

If the temporary employee chose to attach a List B document, they are required to ALSO attach a List C document for their onboarding documents to be considered complete.

**You may not complete the form without the correct documentation**

In this job aid, the temporary employee attached their passport, which as shown on the List of Acceptable Documents as a List A document.

Because the temporary employee provided their List A document, you will complete List A section only. Please complete all the requested information.

First, please click the red circle radio button in order to select which document(s) were provided by the temporary employee.

Next, please complete the required information for your selected area. Below you will see an example.

*** Important: If the temporary employee attached a List B and List C document, after clicking the List B radio button, List C will populate to complete as well. You must complete both sections. ***

If the temporary employee attached both, the screenshot below must be completed.
Please Note: Remember to read the yellow notes on the I-9 Form to assist you

After completing the required areas of the document information, you will now complete your information as the authorized representative (as shown below).

Completion of Certification of Section 2
The required information is listed below:
The employee’s first day of employment
Your signature
Your title
Your Last Name
Your First Name
Your Agency Name
Your Agency’s Address, City, State & Zip Code

An example of the completed information is shown below. In this example, the Authorized Representative is an HR Technician with Temporary Solutions.
After completion of the certification, you must click the final sign icon. Please click the sign icon in order to sign & date the next statement.

If you have completed all the required areas, you should receive a Done! Select Finish to send the completed document message in the blue header (as shown below).

Done! Select Finish to send the completed document.

Are you done? Let’s check!

You should not see a Next button to the left of your documents anymore.

If you do still see the Next icon (as shown below), please click Next to see what required fields you may have missed.

Once the Next button icon has disappeared, you should see the ‘Done! Select Finish to send the completed document!’ Message appear at the top of your screen (as shown below).

Done! Select Finish to send the completed document.

Please click FINISH.

Congratulations, you have finished your DocuSign review & completion! You should now receive a similar notification/request to below:
If you would like to sign up for a free DocuSign account, you may at this time.

If you would like to save or print your documents, please click one of the icons (shown below).

After either clicking Submit or No Thanks, your screen should populate the message below.

You're All Done!
You'll receive a copy once everyone has signed

This means the necessary documents have been submitted to your agency’s Placement Counselor for onboarding.

Please reach out to the Placement Counselor with any questions or concerns.
## Section 2. Employer or Authorized Representative Review and Verification

Employers or their authorized representative must complete and sign Section 2 within 3 business days of the employee’s first day of employment. You must physically examine one document from List A OR a combination of one document from List B and one document from List C as listed on the “Lists of Acceptable Documents.”

### Employee Info from Section 1

<table>
<thead>
<tr>
<th>Employee Info from Section 1</th>
<th>Last Name (Family Name)</th>
<th>First Name (Given Name)</th>
<th>M.I.</th>
<th>Citizenship/Immigration Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td></td>
<td>Temporary</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>

### List A

<table>
<thead>
<tr>
<th>Document Title</th>
<th>Issuing Authority</th>
<th>Document Number</th>
<th>Expiration Date (if any) (mm/dd/yyyy)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### List B

<table>
<thead>
<tr>
<th>Document Title</th>
<th>Issuing Authority</th>
<th>Document Number</th>
<th>Expiration Date (if any) (mm/dd/yyyy)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### List C

<table>
<thead>
<tr>
<th>Document Title</th>
<th>Issuing Authority</th>
<th>Document Number</th>
<th>Expiration Date (if any) (mm/dd/yyyy)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Additional Information

Certification: I attest, under penalty of perjury, that (1) I have examined the document(s) presented by the above-named employee, (2) the above-listed document(s) appear to be genuine and to relate to the employee named, and (3) to the best of my knowledge the employee is authorized to work in the United States.

The employee’s first day of employment (mm/dd/yyyy): _____________.

(See instructions for exemptions)

<table>
<thead>
<tr>
<th>Signature of Employer or Authorized Representative</th>
<th>Date of Employment (mm/dd/yyyy)</th>
<th>Title of Employer or Authorized Representative</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>4/14/2020</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Last Name of Employer or Authorized Representative</th>
<th>First Name of Employer or Authorized Representative</th>
<th>Employer’s Business or Organization Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Employer’s Business or Organization Address (Street Number and Name)</th>
<th>City or Town</th>
<th>State</th>
<th>ZIP Code</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>-- select --</td>
</tr>
</tbody>
</table>

**Note:** Do not write in this space.