

# IT Contract Signature Routing with DocuSign

## INSTRUCTIONAL GUIDE



1. Ensure you can view the Department of Information Technology (DoIT) DocuSign **routing templates** when you [sign into DocuSign](#) as shown in steps 4 through 6 below. If you do not, request access to the shared DocuSign **routing templates** by [emailing the DoIT Service Desk](#). Use “Request Access to DocuSign IT Contract Routing Templates” in the subject line of your email. **This is a one-time step only for each sender.**

**IMPORTANT NOTE:** The term “template” can refer either to the Word **contract template** or to the DocuSign **routing template**. The basic process is to download the Word **contract template** from the DoIT Enterprise Project Management Office (EPMO) website, edit it for your specific contract, then use it within the DocuSign **routing template** to route for signatures.

2. Download the Word **contract template** appropriate for your use at the DoIT EPMO website: [Contract & RFP Templates & Guidance](#)

The screenshot shows two sections of a website. The first section is titled 'Contract Templates' and contains a table with three rows of templates. The second section is titled 'Professional Services Agreements' and contains a table with three rows of templates. Both tables have columns for 'Title', 'Notes', and 'Open File'.

Contract Templates		
Title	Notes	Open File
IT Agreement Amendment Template		<a href="#">Open File</a>
Information Technology Contract Template \$60,000 or less		<a href="#">Open File</a>
Information Technology Contract Template greater than \$60,000		<a href="#">Open File</a>

**Professional Services Agreements**  
IT Professional Services Agreement Templates ONLY to be used for procuring services from the IT Statewide Price Agreements No. 30-00000-23-00080\*\*

Professional Services Agreements		
Title	Notes	Open File
Professional Services Agreement for Staff Augmentation or Fixed Price Deliverables Template	NEW February 14, 2024	<a href="#">Open File</a>
Professional Services Agreement for Non-Certified Staff Augmentation Template	NEW February 14, 2024	<a href="#">Open File</a>
Professional Services Agreement Amendment Template	NEW February 14, 2024	<a href="#">Open File</a>

3. Edit the Word **contract template** as indicated by the highlighted portions of the documents. On the signature pages, edit the yellow text only, as these pages have hidden formatting that impacts signature placement and routing workflow within DocuSign.

**IMPORTANT NOTES:** DocuSign is a tool meant for signing documents that are in their **final** state. If an error is discovered after someone has signed and new edits need to be made, the envelope will need to be voided and resubmitted. Please ensure your contract is in the **final** state before uploading and

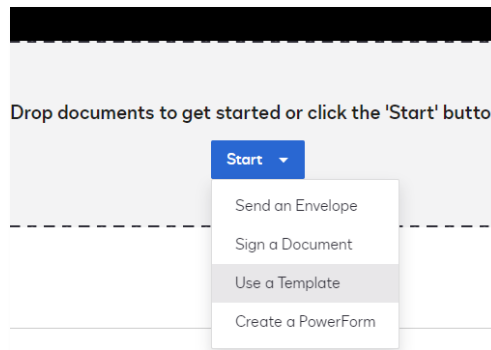
submitting for signature via DocuSign. Final state means that all internal agency reviews, vendor reviews, and DoIT E-Review have already been conducted as relevant using the standard process outside of the DocuSign tool.

A non-signature pre-review approval step for the Contracts Review Bureau (CRB), State Purchasing Division, is at the beginning of the signature routing process to identify any error(s) early, potentially avoiding an envelope resubmission and the cost of a voided envelope. If CRB identifies an issue in the pre-review approval step that may affect their final signature for contract execution, they will contact the sender via email, who will then be able to replace the contract with the needed corrections within the DocuSign envelope as described in step 8. CRB will re-review and upon approval, the remainder of the signing process will proceed to include the vendor signatures, agency signatures, Taxation & Revenue Dept. (TAX) signature, approval steps by DoIT EPMO and Office of General Counsel (OGC), DoIT Cabinet Secretary signature, and then back to CRB signature to fully execute the contract.

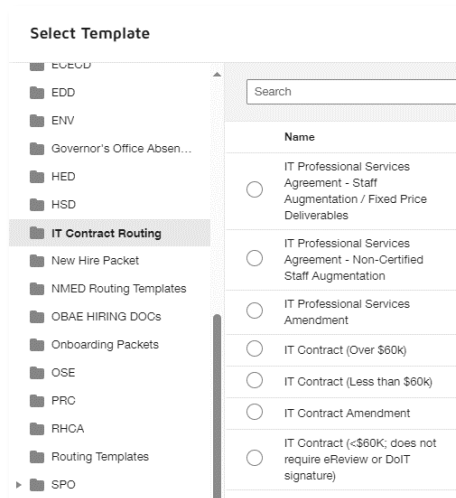
Please pay particular attention to the CRS ID #. This field must be filled out prior to uploading the document in DocuSign. If not included, TAX will reject the envelope and the process will need to begin anew.

DoIT EPMO will reject the envelope if it is determined that the contract has not previously been through the E-Review process.

4. [Sign into DocuSign](#), click **START** and click **Use a Template**.



5. In the Select Template dialog, go to **Shared Folders** and click **IT Contract Routing**.



6. Locate and click the circle next to the DocuSign **routing template** you would like to use that corresponds to your Word **contract template** then choose **ADD SELECTED**.

Name	
<input checked="" type="radio"/>	DoIT IT Contract (Over \$60k)
<input type="radio"/>	DoIT IT Contract (Less than \$60k)
<input type="radio"/>	DoIT IT Contract Amendment

7. On the following screen under **Add Documents**, click the three menu dots next to the placeholder agreement title and choose **Replace**.

The screenshot shows the 'Add documents' interface. It features three document thumbnails. The first thumbnail is titled 'DoIT IT Contract Bucksli... 1 page 1 Template Applied'. The second thumbnail is titled 'Professional Services Agree... 8 pages'. A context menu is open over the second thumbnail, showing three options: 'Apply Templates', 'Replace', and 'Download Document'. The 'Replace' option is highlighted. To the right of the thumbnails is a large area with a document icon and the text 'Drop your files here or' and a blue 'UPLOAD' button.

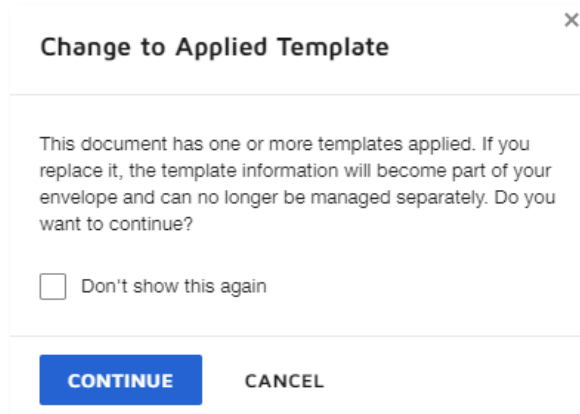
8. Find the edited contract template you worked on in step 3, select and choose **Open**.

The screenshot shows a file explorer window. The file list has the following columns: Name, Date modified, Type, and Size. The first row is selected and highlighted in blue:

Name	Date modified	Type	Size
Example of Finalized Contract #24-000-2000	6/24/2022 3:48 PM	Microsoft Word D...	

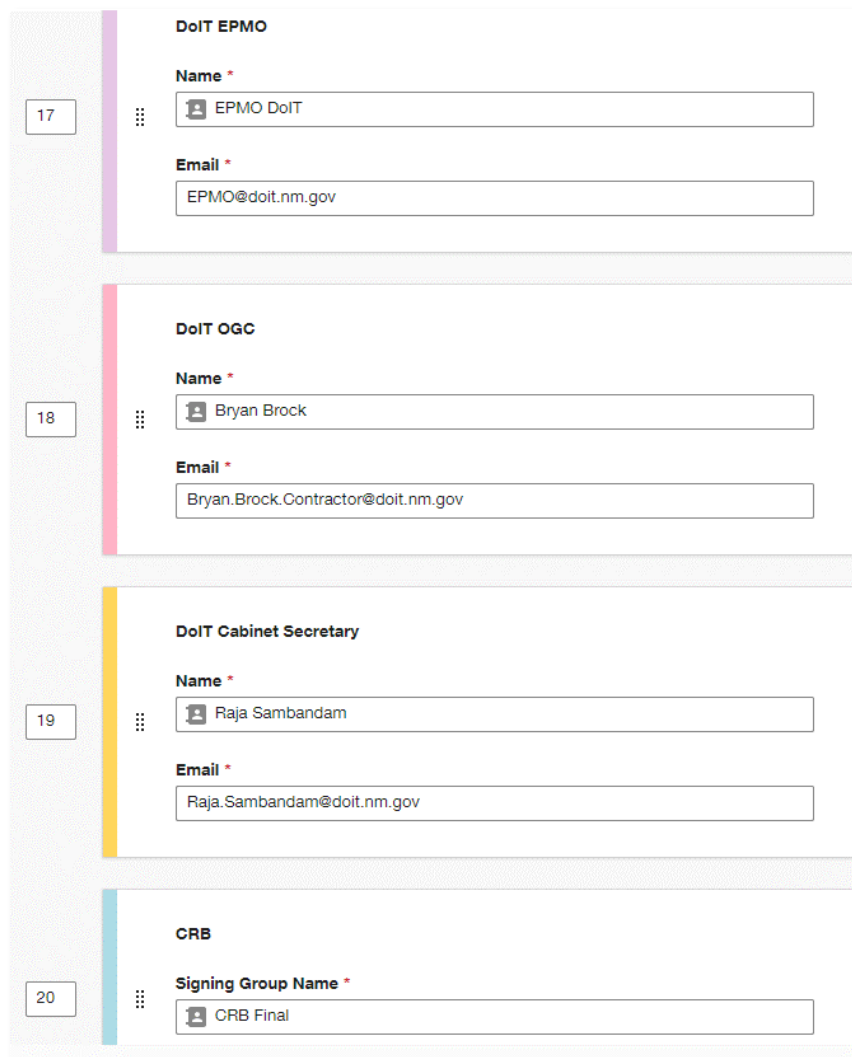
Below the file list, there is a search bar with the text 'Example of Finalized Contract #24-000-2000' and a dropdown menu. To the right of the search bar is another dropdown menu labeled 'Custom files'. At the bottom of the window are two buttons: 'Open' and 'Cancel'.

9. You may get a prompt regarding a change to the applied template; if so, click **CONTINUE**.



A dialog box titled "Change to Applied Template" with a close button (X) in the top right corner. The text inside reads: "This document has one or more templates applied. If you replace it, the template information will become part of your envelope and can no longer be managed separately. Do you want to continue?". Below the text is a checkbox labeled "Don't show this again". At the bottom, there are two buttons: "CONTINUE" (in a blue box) and "CANCEL".

10. Enter the name and email address of the Agency Processor, who will be entering the information required in the Contract Request Summary sheet. Then, enter the names and email addresses for those individuals in your agency who are listed on the signature page(s) of the template. You may make additions to this routing—for instance if your agency has a process that requires certain people to view or initial a contract—however, ***it's critically important to not delete or change any of the pre-filled CRB or DoIT signers:***



A routing slip form with four sections, each with a number in a box on the left and a colored vertical bar on the left side of the section. Each section has a title, a "Name" field with a dropdown arrow, and an "Email" field.

- 17** (purple bar): **DoIT EPMO**  
Name: EPMO DoIT  
Email: EPMO@doit.nm.gov
- 18** (pink bar): **DoIT OGC**  
Name: Bryan Brock  
Email: Bryan.Brock.Contractor@doit.nm.gov
- 19** (yellow bar): **DoIT Cabinet Secretary**  
Name: Raja Sambandam  
Email: Raja.Sambandam@doit.nm.gov
- 20** (blue bar): **CRB**  
Signing Group Name: CRB Final

11. Under the Add message section, check that you have replaced *[Agency]* and *[Contract Number]* and edited the email message as desired:

**Add message**

Custom email and language for each recipient

**Email Subject \***

GSD Requests DocuSign: Vendor Contract # 24-000-0000

Characters remaining: 48

**Email Message**

Example message that can be included for envelope recipients.

Characters remaining: 9939

12. Click **NEXT** and validate that the signatures match the signature block and are aligned appropriately as shown below.

IN WITNESS WHEREOF, the Parties hereby execute this Agreement, which will take effect on the last signature date of the required approval authorities below. Each of the signatories, below, may execute this Agreement by hard copy original, facsimile, digital or electronic signature, any of which will be deemed to be a true and original signature hereunder.

By: **Sign** \_\_\_\_\_ Date: **Date Signed** \_\_\_\_\_  
David Scrase MD, Cabinet Secretary  
HSD

By: **Sign** \_\_\_\_\_ Date: **Date Signed** \_\_\_\_\_  
Joe Smith, CEO  
Servers R Us

By: **Sign** \_\_\_\_\_ Date: **Date Signed** \_\_\_\_\_  
Sean Pearson, Chief Information Officer  
HSD

13. Click **SEND**. Again, as noted in Step 3, ensure you have followed the E-Review process prior to using DocuSign for routing signatures, and take appropriate proofreading and validation steps prior to sending the document.