

Onboarding - The Service Rep's Process

Last Modified on 10/29/2026 4:10 pm CDT

Beyond makes onboarding new employees that enter your database from your Onboarding Portal easy by giving the service rep a convenient space on an employee record to process their online application and additional actions. Employees that begin an action in the Onboarding Portal can be given additional material or assigned a brand-new action within this space.

VISIFILEDETAILSVSYSTEMIQUDOCUMENTSMESSAGESJOB MATCHINGASSIGNMENTSSTORYREFERENCESPAY SETUPVONBOARDINGONBOARDING 2.0PAY HISTORYVCUSTOM DATATEST PAGELINKEDINMOREV

Showing 12 of 12 Employee Actions

CREATE LINK FOR ALL EMPLOYEE ACTIONSSTART ALL EMPLOYER ACTIONSASSIGN ACTION

Action Name	Progress	Date Created	Due Date	Date Expired	Date Completed	Assignee	Status	Employer Action
Filter...	Filter...	mm/dd/yyyy	mm/dd/yyyy	mm/dd/yyyy	mm/dd/yyyy			
Direct Deposit Form (TempWorks Default)	13%	9/11/2026				Employee	Requires Action	
Employee Agreement Sample MHI	78%	9/11/2026				Employee	Requires Action	
Background Check Disclosure and Authorization	25%	9/11/2026				Employee	Requires Action	
TempWorks Resume Collection Form		9/11/2026				Employee	Requires Action	
Employment Eligibility Verification (Standard I-9)	45%	9/11/2026				Employee	Requires Action	
Direct Deposit Form (TempWorks Default)	100%	8/19/2026			8/19/2026	None	Completed	
Employee Agreement Sample MHI	100%	8/19/2026			8/19/2026	None	Completed	
Background Check Disclosure and Authorization	100%	8/19/2026			8/19/2026	None	Completed	
TempWorks Resume Collection Form	100%	8/19/2026			8/19/2026	None	Completed	
TempWorks WebCenter User Account Setup Form	100%	8/19/2026			8/19/2026	None	Completed	
Direct Deposit Form	100%	8/19/2026			8/19/2026	None	Completed	
Employment Eligibility Verification (Standard I-9)	100%	8/19/2026			8/19/2026	None	Completed	

Security Permissions

To access the "Onboarding 2.0" tab within Beyond, you will need to be a member of a Security Group that contains the following permissions:

- Can Assign HRCenter Workflows and Onboarding 2.0 Actions
- Can Delete Onboarding 2.0 Actions

Permissions (2 Visible, 74 Not Visible)76 Selected

Onboarding 2.0 Actions

☒ Can assign HRCenter workflows and Onboarding 2.0 actions
Allows a user to assign new workflows in HRCenter and Onboarding 2.0 actions.

☒ Can delete Onboarding 2.0 actions
Allows a user to delete Onboarding 2.0 actions.

Note If you utilize custom Security Groups with Advanced Permissions, you will need to add the "Access" to the "Onboarding 2.0" pages within Employee > Onboarding 2.0 and Records > Onboarding 2.0 to the Security Groups that require the functionality:

BY PAGE

BY FIELD

Selecting a parent selects children ☒

onboarding 2.0

×

Employee

Onboarding 2.0

Onboarding 2.0 Page

Onboarding 2.0 Action Page

Records

☒ Access

☒ Access

☒ Access

☒ Access

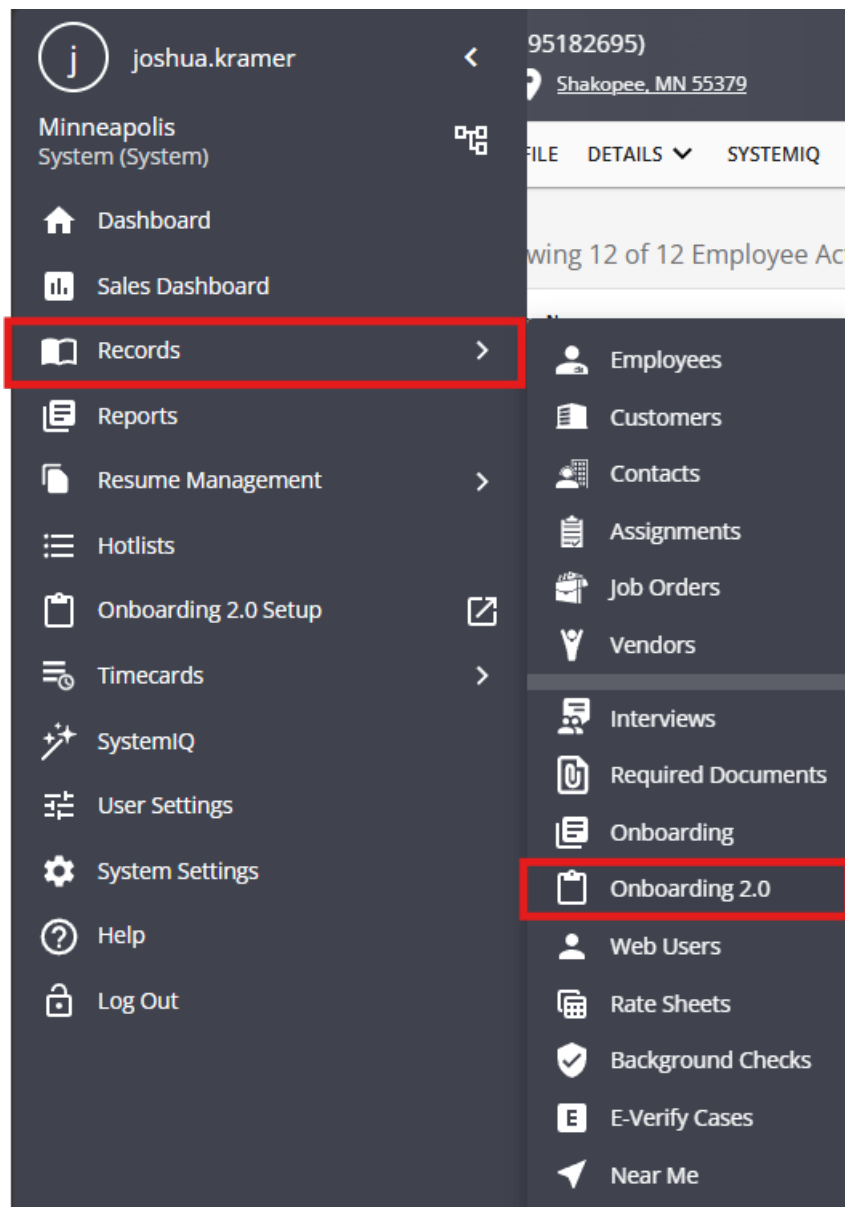
☒ Access

☒ Access

For more information on created custom Security Groups with Advanced Permissions, please see the following article titled "[Beyond - Creating Security Groups with Advanced Permissions](#)".

Onboarding 2.0 Search

You can search on all employee and employer actions via the Onboarding 2.0 search via B menu > Records > Onboarding 2.0:



Within the Onboarding 2.0 search, you can utilize the following filters:

- **Status:** Requires Action (Default), Completed, Expired
- **Assignee:** Employee, Employer, None
- **Account:** The organizations you have access to within the Onboarding Portal
- **Action Name:** Forms that have been created within the Onboarding Portal
- **First Name:** The first name of the employee record that has been assigned the action
- **Last Name:** The last name of the employee record that has been assigned the action
- **Employee Branch:** The branch of the employee record
- **Date Created (From):** Date range in which the employee action has been created
- **Date Created (To):** Date range in which the employee action has been created

Onboarding 2.0 Search - Search all assigned employee actions

Status	Assignee	Account	Action Name
Requires Action	Employee	TWDemo	
First Name	Last Name	Employee Branch	Date Created (From) Date Created (To)
		St.Paul	9/1/2026 -
MORE FILTERS			
RESET SEARCH			
18 results			
Employee Name	Primary Email Address	Primary Phone Number	Employee Branch
Staffing Specialist	Requires Action		
Berrier, Jordan	J.Ber@xip.xom	(651) 357-6902	St.Paul
alexander.swanson	5		
Boss, Rick	R.Boss@xip.xom	(651) 357-4122	St.Paul
HRCenter twdemo	7		
Diaz, Paula	P.D@xip.xom	(651) 354-6845	St.Paul
HRCenter twdemo	7		
Frost, Mac	Mac.Frost@xip.xom	(651) 354-7846	St.Paul
HRCenter twdemo	7		
Gatts, Luke	Luke.Gatts@xip.xom	(651) 354-4466	St.Paul
HRCenter twdemo	7		
Glass, Pete	P.Glass@xip.xom	(681) 535-1534	St.Paul
HRCenter twdemo	7		

Within the search results, you can expand any of the employee records to view a list of actions as they relate to the search criteria selected:

Onboarding 2.0 Search - Search all assigned employee actions

Status

Requires Action

Assignee

Employee

Account

TWDEmo

Action Name

First Name

Last Name

Employee Branch

St.Paul

Date Created (From)

9/1/2026

Date Created (To)

MORE FILTERS

RESET

SEARCH

18 results

Employee Name

Primary Email Address

Primary Phone Number

Employee Branch

Staffing Specialist

Requires Action

Berrier, Jordan

J.Ber@xip.xom

(651) 357-6902

St.Paul

alexander.swanson

5

Action Name

Date Created

Due Date

Date Expired

Date Updated

Date Completed

Assignee

Status

Employer Action

Direct Deposit Form (TempWorks Default)

9/10/2026

9/10/2026

Employee

Requires Action

Employee Agreement Sample MH

9/10/2026

9/10/2026

Employee

Requires Action

Background Check Disclosure and Authorization

9/10/2026

9/10/2026

Employee

Requires Action

TempWorks Resume Collection Form

9/10/2026

9/10/2026

Employee

Requires Action

Employment Eligibility Verification (Standard L-9)

9/10/2026

9/10/2026

Employee

Requires Action

Selecting an action within the search results will navigate you directly to that actions record within Beyond, where you will have the ability to edit the action, or create a new action link to send directly to the employee:

VISIFILE DETAILS SYSTEMIQ DOCUMENTS MESSAGES JOB MATCHING ASSIGNMENTS STORY REFERENCES PAY SETUP ONBOARDING ONBOARDING 2.0 PAY HISTORY CUSTOM DATA TEST PAGE LINKEDIN MORE			
Direct Deposit Form (TempWorks Default)			
EDIT ACTION REQUEST CHANGE CREATE ACTION LINK			
OVERVIEW			
ID	task_uKEbNVIBRadRExvMbZoQt	Status	Requires Action
Next Action	Employee	Form	Direct Deposit Form (TempWorks Default)
Entities	Employer: High Tech Staffing Inc.	Progress	13% 1/8
Tags	Light Industrial, General Onboarding	Due at	—
Expiration at	—	Deletion scheduled at	—
Deletion allowed at	—	Created at	September 10th 2026 4:09 PM
Updated at	September 10th 2026 4:09 PM		

Note Additionally, you are able to complete employer actions directly within the search results. This can be completed by selecting the  icon to the right of the employee action:

Onboarding 2.0 Search - Search all assigned employee actions

Status Requires Action	Assignee Employer	Account TWDemo	Action Name
First Name	Last Name	Employee Branch St.Paul	Date Created (From) 8/1/2026
Date Created (To)			
MORE FILTERS			RESET SEARCH

1 result

Employee Name	Primary Email Address	Primary Phone Number	Employee Branch	Staffing Specialist	Requires Action
Hargroder, Susan	susanhargroder23@gmail.com	(612) 759-0350	St.Paul	onboarded Integration	2

Action Name	Date Created	Due Date	Date Expired	Date Updated	Date Completed	Assignee	Status	Employer Action
Employee Agreement Sample MH	8/19/2026		8/19/2026			Employer	Requires Action	
Employment Eligibility Verification (Standard I-9)	8/19/2026		8/19/2026			Employer	Requires Action	

The Onboarding 2.0 Tab

Once an employee record is created within Beyond, either manually or through registration within the Onboarding Portal, you have the ability to view, create, and edit employee actions directly on the employee record via the Onboarding 2.0 tab:

VISIFILE

DETAILS

SYSTEMIQ

DOCUMENTS

MESSAGES

JOB MATCHING

ASSIGNMENTS

STORY

REFERENCES

PAY SETUP

ONBOARDING

ONBOARDING 2.0

PAY HISTORY

CUSTOM DATA

TEST PAGE

LINKEDIN

MORE

Showing 12 of 12 Employee Actions

CREATE LINK FOR ALL EMPLOYEE ACTIONS

START ALL EMPLOYER ACTIONS

ASSIGN ACTION

Action Name	Progress	Date Created	Due Date	Date Expired	Date Completed	Assignee	Status	Employer Action
<input type="text" value="Filter..."/>	<input type="text" value="Filter..."/>	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="mm/dd/yyyy"/>	<div></div>	<div></div>	
Direct Deposit Form (TempWorks Default)	<div><div></div>13%</div>	9/11/2026				Employee	Requires Action	
Employee Agreement Samole MH	<div><div></div>78%</div>	9/11/2026				Employee	Requires Action	
Background Check Disclosure and Authorization	<div><div></div>25%</div>	9/11/2026				Employee	Requires Action	
TempWorks Resume Collection Form	<div><div></div></div>	9/11/2026				Employee	Requires Action	
Employment Eligibility Verification (Standard I-9)	<div><div></div>45%</div>	9/11/2026				Employee	Requires Action	
Direct Deposit Form (TempWorks Default)	<div><div></div>100%</div>	8/19/2026			8/19/2026	None	Completed	
Employee Agreement Samole MH	<div><div></div>100%</div>	8/19/2026			8/19/2026	None	Completed	
Background Check Disclosure and Authorization	<div><div></div>100%</div>	8/19/2026			8/19/2026	None	Completed	
TempWorks Resume Collection Form	<div><div></div>100%</div>	8/19/2026			8/19/2026	None	Completed	
TempWorks WebCenter User Account Setup Form	<div><div></div>100%</div>	8/19/2026			8/19/2026	None	Completed	
Direct Deposit Form	<div><div></div>100%</div>	8/19/2026			8/19/2026	None	Completed	
Employment Eligibility Verification (Standard I-9)	<div><div></div>100%</div>	8/19/2026			8/19/2026	None	Completed	

Within the Onboarding 2.0 tab, employee actions can have one of the following statuses:

- **Requires Action:** The form needs to be completed either by a recruiter or an employee. The "Assignee" column indicates who is next to complete the form.
- **Expired:** If an expiration date was set on the form, this status is shown when a form reaches its expiration date. The form will need to be resubmitted before an employee is able to complete the action.
- **Completed:** The form has been completed. In order to make any changes to the completed form, a "Request Change" action must be created.

Within the "Action Name" column, this is where you will see a list of forms that have been assigned to the employee. Selecting a form within the list will navigate you to view additional details related to the form:

Employment Eligibility Verification [Standard I-9]

EDIT ACTION

REQUEST CHANGE

CREATE ACTION LINK

OVERVIEW

ID

task_qAJVmB9rSUFxntNwjJWZ

Next Action

—

Entities

Employer: High Tech Staffing Inc.

Tags

I-9, Federal, Employment Eligibility

Expiration at

—

Deletion allowed at

—

Updated at

August 19th 2026 12:39 PM

FIELDS

Status

Completed

Form

Employment Eligibility Verification [Standard I-9]

Progress

100%

93/93

Due at

—

Deletion scheduled at

—

Created at

August 19th 2026 12:12 PM

Selecting the "Fields" tab will show you the information the employee had entered within each of the fields present within the form:

Employment Eligibility Verification [Standard I-9]				EDIT ACTION	REQUEST CHANGE	CREATE ACTION LINK
OVERVIEW		FIELDS				
Your information		Employee Submitted August 19th 2026 12:17 PM				▼
Confirm details		Employee Submitted August 19th 2026 12:17 PM				▲
Is the information above correct? *		<div> <div>✓</div> </div>				
2 empty fields						▼
Work Status		Employee Submitted August 19th 2026 12:18 PM				▲
Your work authorization status: *		Do you have a Social Security number? *				
us_citizen		<div> <div>✓</div> </div>				
Social Security Number *						
# . . .						
Documents		Employee Submitted August 19th 2026 12:19 PM				▲
Which document(s) are you providing? *		Select your List B document below *				
list_b_and_c		drivers_license				
Document Title *		Issuing Authority *				
Driver's License		MN				

Note Form fields including SSN's (Government Identification Numbers), etc. can be marked as "Sensitive" within the Onboarding Portal to mask the respective fields.

Assigning Employee Actions

Links can be created for employee actions via the following methods:

- **Create Link for all Employee Actions:** For all forms that have already been assigned to the employee to complete

Showing 12 of 12 Employee Actions

CREATE LINK FOR ALL EMPLOYEE ACTIONS

Action Name	Progress	Date Created ↓	Due Date	Date Expired	Date Completed	Assignee	Status	Employer Action
Filter...	Filter...	mm/dd/yyyy	mm/dd/yyyy	mm/dd/yyyy	mm/dd/yyyy			
Direct Deposit Form (TempWorks Default)	13%	9/11/2026				Employee	Requires Action	...
Employee Agreement Sample MH	78%	9/11/2026				Employee	Requires Action	...
Background Check Disclosure and Authorization	25%	9/11/2026				Employee	Requires Action	...
TempWorks Resume Collection Form		9/11/2026				Employee	Requires Action	...
Employment Eligibility Verification (Standard I-9)	45%	9/11/2026				Employee	Requires Action	...
Direct Deposit Form (TempWorks Default)	100%	8/19/2026			8/19/2026	None	Completed	...

- **Assign Action:** For new forms that need to be assigned to the employee to complete

Showing 12 of 12 Employee Actions

CREATE LINK FOR ALL EMPLOYEE ACTIONS

Action Name	Progress	Date Created ↓	Due Date	Date Expired	Date Completed	Assignee	Status	Employer Action
Filter...	Filter...	mm/dd/yyyy	mm/dd/yyyy	mm/dd/yyyy	mm/dd/yyyy			
Direct Deposit Form (TempWorks Default)	13%	9/11/2026				Employee	Requires Action	...
Employee Agreement Sample MH	78%	9/11/2026				Employee	Requires Action	...
Background Check Disclosure and Authorization	25%	9/11/2026				Employee	Requires Action	...
TempWorks Resume Collection Form		9/11/2026				Employee	Requires Action	...
Employment Eligibility Verification (Standard I-9)	45%	9/11/2026				Employee	Requires Action	...
Direct Deposit Form (TempWorks Default)	100%	8/19/2026			8/19/2026	None	Completed	...

Create Link for all Employee Actions

By selecting "Create Link for all Employee Actions", a new "Create Link" window will open, displaying the list of forms that have already been assigned to the employee:

Create Link

1 Select Actions

2 Generate Link

Create a link you can send to the employee to complete their actions

☒ Select All
 12 of 12 selected

☒ Background Check Disclosure and Authorization

☒ Background Check Disclosure and Authorization

☒ Direct Deposit Form

☒ Direct Deposit Form (TempWorks Default)

☒ Direct Deposit Form (TempWorks Default)

☒ Employee Agreement Sample MH

☒ Employee Agreement Sample MH

Locale

Auto

Redirect URL

https://example.com

CANCEL

NEXT >

It is within this window that you can select all of the forms within the list, or cater the list to what you need the employee to complete.

You can also select the "Locale" that will determine the language in which the forms are presented to the employee:

Locale

Auto

Auto

English

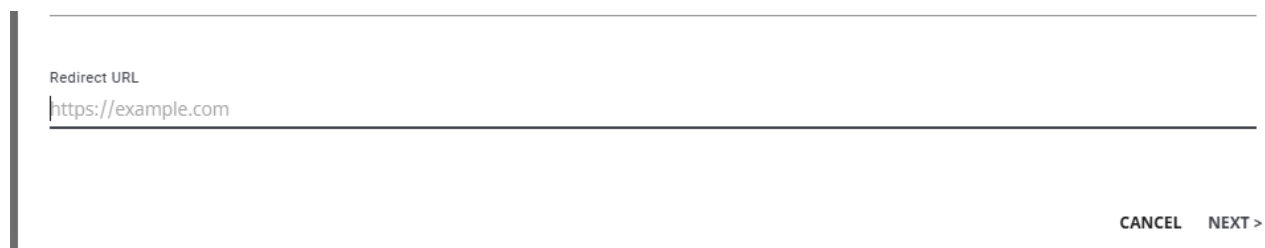
Spanish

CANCEL

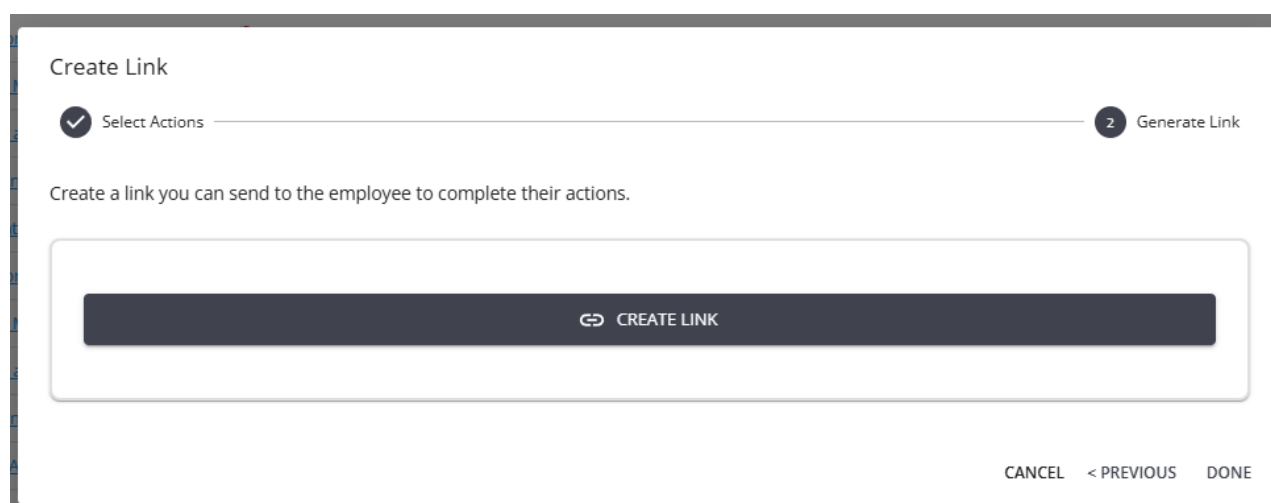
NEXT >

Note For more information on form localizations, please see the article titled [Onboarding - Form Translations](#).

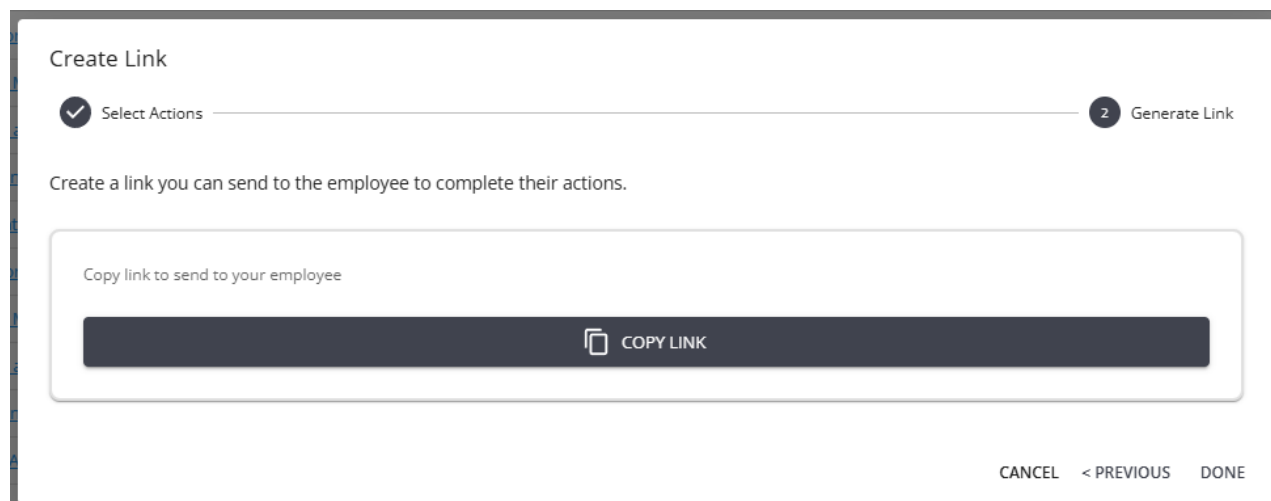
You can utilize the "Redirect URL" field to navigate the employee to the specified URL once the forms have been completed:

A screenshot of a form with a label "Redirect URL" and a text input field containing the URL "https://example.com". At the bottom right of the form are two buttons: "CANCEL" and "NEXT >".

Once finished, select "Next" and then select "Create Link":

A screenshot of the "Create Link" screen. At the top, there is a progress bar with two steps: "1 Select Actions" (which is active, indicated by a checkmark) and "2 Generate Link". Below the progress bar is the instruction "Create a link you can send to the employee to complete their actions." In the center, there is a large dark button with a link icon and the text "CREATE LINK". At the bottom right, there are three buttons: "CANCEL", "< PREVIOUS", and "DONE".

With the link created, select "Copy Link":

A screenshot of the "Create Link" screen, similar to the previous one, but with the "COPY LINK" button highlighted. The button has a copy icon and the text "COPY LINK". The rest of the screen, including the progress bar and instructions, is identical to the previous screenshot.

Note Once the link is copied, it will need to be sent to the employee for completion via email or text.

Note Optionally, you can select the  to the right of the individual action within the Onboarding 2.0 list

and select "Create Action Link" to open the "Create Link" window with that individual form selected from the list:

VISIFILE DETAILS SYSTEMIQ DOCUMENTS MESSAGES JOB MATCHING ASSIGNMENTS STORY REFERENCES PAY SETUP ONBOARDING ONBOARDING 2.0 PAY HISTORY CUSTOM DATA TEST PAGE LINKEDIN MORE									
Showing 12 of 12 Employee Actions					GD CREATE LINK FOR ALL EMPLOYEE ACTIONS		START ALL EMPLOYER ACTIONS		ASSIGN ACTION
Action Name	Progress	Date Created	Due Date	Date Expired	Date Completed	Assignee	Status	Employer Action	
Filter...	Filter...	mm/dd/yyyy	mm/dd/yyyy	mm/dd/yyyy	mm/dd/yyyy				
Direct Deposit Form (TempWorks Default)	13%	9/11/2026				Employee	Requires Action		
Employee Agreement Sample MH	78%	9/11/2026				Employee	Requires Action		
Background Check Disclosure and Authorization	25%	9/11/2026				Employee	Requires Action		
TempWorks Resume Collection Form		9/11/2026				Employee	Requires Action		

Create Link

1 Select Actions

2 Generate Link

Create a link you can send to the employee to complete their actions

☐ Select All

1 of 12 selected

☒ Background Check Disclosure and Authorization

☐ Background Check Disclosure and Authorization

☐ Direct Deposit Form

☐ Direct Deposit Form (TempWorks Default)

☐ Direct Deposit Form (TempWorks Default)

☐ Employee Agreement Sample MH

☐ Employee Agreement Sample MH

You can then proceed through the same steps as outlined above to create the action link and send to the employee to complete the form.

Assign Action

By selecting "Assign Action", a new window will open, allowing you the ability to assign new forms to the employee.

Within the "Assign Action" window, enter the following:

- **Form:** The name of the form within the Onboarding Portal
- **Employer:** The employer record within the Onboarding Portal
- (Optional) **Due Date:** Set a date in which the action needs to be completed by the employee
- (Optional) **Expiration Date:** Set a date in which the action will expire if not completed
- (Optional) **Deletion Allowed At:** Set this to prevent an action from being deleted until the specified time

- (Optional) **Deletion Scheduled At:** Set this to automatically delete the action at a specific time in the future

Note The same form is unable to be assigned twice.

Once the information has been entered, select "Submit" to assign the action to the employee:

Assign Action

* Form

Minnesota State Withholding [W-4MN]

* Employer

High Tech Staffing Inc

Due Date

09/25/2026 12:00 PM

Expiration Date

Deletion Allowed At

Set this field to prevent an action from being deleted until the specified time. This can be helpful when ensuring completed tasks are retained for compliance reasons.

Deletion Scheduled At

Set this field to automatically delete an action at a specific time in the future. This can be helpful when certain tasks need to be deleted after a specific retention period.

SAVE AS DRAFT

CANCEL

SUBMIT

At this point, the action will need to have a link created and sent to the employee for completion. This can be done via the "Create Action Link" option:

<div> <div>VISIFILE</div> <div>DETAILS</div> <div>SYSTEMIQ</div> <div>DOCUMENTS</div> <div>MESSAGES</div> <div>JOB MATCHING</div> <div>ASSIGNMENTS</div> <div>STORY</div> <div>REFERENCES</div> <div>PAY SETUP</div> <div>ONBOARDING</div> <div>ONBOARDING 2.0</div> <div>PAY HISTORY</div> <div>CUSTOM DATA</div> <div>TEST PAGE</div> <div>LINKEDIN</div> <div>MORE</div> </div>									
Showing 12 of 12 Employee Actions									
<div> <div>CREATE LINK FOR ALL EMPLOYEE ACTIONS</div> <div>START ALL EMPLOYER ACTIONS</div> <div>ASSIGN ACTION</div> </div>									
Action Name	Progress	Date Created	Due Date	Date Expired	Date Completed	Assignee	Status	Employer Action	
Filter...	Filter...	mm/dd/yyyy	mm/dd/yyyy	mm/dd/yyyy	mm/dd/yyyy				
Direct Deposit Form (TempWorks Default)	13%	9/11/2026				Employee	Requires Action		
Employee Agreement Sample MH	78%	9/11/2026				Employee	Requires Action		
Background Check Disclosure and Authorization	25%	9/11/2026				Employee	Requires Action		
TempWorks Resume Collection Form		9/11/2026				Employee	Requires Action		
									<div> <div>Request Change</div> <div>Edit Action</div> <div>Create Action Link</div> </div>

Note Actions can also be assigned via the "Onboarding 2.0" charm on the employee record:

The screenshot shows the top navigation bar with 'Onboarding 2.0' highlighted. A dropdown menu is open, showing 'Assign Action' as the selected option. Below the menu, there are buttons for 'CREATE LINK FOR ALL EMPLOYEE ACTIONS', 'START ALL EMPLOYER ACTIONS', and 'ASSIGN ACTION'. A table with columns 'Date Completed', 'Assignee', 'Status', and 'Employer Action' is partially visible.

Selecting "Assign Action" will navigate you through the same steps as outlined above.

Reviewing & Completing Actions

Depending on the action that has been submitted by the employee, it may require an employer action to be completed, such as the electronic signing of a form.

Employer actions can be completed via one of the following methods:

- The "Start All Employer Actions" option:

This screenshot shows the 'Start All Employer Actions' button highlighted with a red box. The table below lists employee actions with their progress, dates, and status.

Action Name	Progress	Date Created	Due Date	Date Expired	Date Completed	Assignee	Status	Employer Action
Minnesota State Withholding (TW-4MN)	50%	9/21/2026	9/25/2026			Employer	Requires Action	
Direct Deposit Form (TempWorks Default)	13%	9/11/2026				Employee	Requires Action	

- The  icon to the right of the individual employee action:

This screenshot shows the play icon in the 'Employer Action' column highlighted with a red box. The table below lists employee actions with their progress, dates, and status.

Action Name	Progress	Date Created	Due Date	Date Expired	Date Completed	Assignee	Status	Employer Action
Minnesota State Withholding (TW-4MN)	50%	9/21/2026	9/25/2026			Employer	Requires Action	
Direct Deposit Form (TempWorks Default)	13%	9/11/2026				Employee	Requires Action	

Once one of the options has been selected, the service rep portion of the form(s) that you will need to complete will open directly within Beyond:

← Employer Action

High Tech Staffing Inc.

Minnesota State Withholding [W-4MN]

Due on 09/25/2026

* Minnesota Withholding Tax ID Number

This is a seven-digit number used to report and pay Minnesota business taxes.

Submit

Language: English

Showing 13 of 13 Employees

Action Name	Status	Employer Action
Minnesota State Withholding [W-4MN]	Requires Action	
Direct Deposit Form (Payroll)	Requires Action	
Employee Agreement Signatures	Requires Action	
Background Check Disposition	Requires Action	
TempWorks Resume Submission	Requires Action	
Employment Eligibility Verification	Requires Action	
Direct Deposit Form (Payroll)	Requires Action	
Employee Agreement Signatures	Requires Action	
Background Check Disposition	Requires Action	
TempWorks Resume Submission	Requires Action	
TempWorks Web Calendar	Requires Action	
Direct Deposit Form	Requires Action	
Employment Eligibility Verification	Requires Action	

Once complete, you can select the back button in the top left corner or anywhere around the frame to close it:

← Employer Action

Tasks Summary

1 of 1 completed

Minnesota State Withholding [W-4MN] Completed

Showing 13 of 13 Employees

Action Name	Status	Employer Action
Minnesota State Withholding [W-4MN]	Completed	
Direct Deposit Form (Payroll)	Requires Action	
Employee Agreement Signatures	Requires Action	
Background Check Disposition	Requires Action	
TempWorks Resume Submission	Requires Action	
Employment Eligibility Verification	Requires Action	
Direct Deposit Form (Payroll)	Requires Action	
Employee Agreement Signatures	Requires Action	
Background Check Disposition	Requires Action	
TempWorks Resume Submission	Requires Action	
TempWorks Web Calendar	Requires Action	
Direct Deposit Form	Requires Action	
Employment Eligibility Verification	Requires Action	

Editing Actions & Requesting Changes

Once actions have been created, you have the ability to edit them or request the employee to make necessary changes before resubmitting.

Editing Actions

Actions can be edited by selecting the  to the right of the action and selecting "Edit Action":

Showing 13 of 13 Employee Actions

CREATE LINK FOR ALL EMPLOYEE ACTIONS START ALL EMPLOYER ACTIONS ASSIGN ACTION

Action Name	Progress	Date Created ↓	Due Date	Date Expired	Date Completed	Assignee	Status	Employer Action
Minnesota State Withholding (W-4MN)	50%	9/21/2026	9/25/2026			Employer	Requires Action	
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Employee Agreement Sample.MH	78%	9/11/2026				Employee	Requires Action	
Background Check Disclosure and Authorization	25%	9/11/2026				Employee	Requires Action	
TempWorks Resume Collection Form		9/11/2026				Employee	Requires Action	

Filter... Filter... mm/dd/yyyy mm/dd/yyyy mm/dd/yyyy mm/dd/yyyy

Request Change Edit Action Create Action Link

Within the "Edit Action" window, you can modify the following information:

- **Due Date:** Set a date in which the action needs to be completed by the employee
- **Expiration Date:** Set a date in which the action will expire if not completed
- **Deletion Allowed At:** Set this to prevent an action from being deleted until the specified time
- **Deletion Scheduled At:** Set this to automatically delete the action at a specific time in the future

Edit Action

Due Date
09/25/2026 12:00 PM

Expiration Date

Deletion Allowed At

Set this field to prevent an action from being deleted until the specified time. This can be helpful when ensuring completed tasks are retained for compliance reasons.

Deletion Scheduled At

Set this field to automatically delete an action at a specific time in the future. This can be helpful when certain tasks need to be deleted after a specific retention period.

Delete action and any submitted data

DELETE ACTION

CANCEL SAVE

Once the information has been entered, select "Save".

Note If you are a member of a Security Group that contains the "Can Delete Onboarding 2.0 Actions" permission, you can select the "Delete Action" option:

Delete action and any submitted data



DELETE ACTION

Please note that once an action is deleted, any submitted data from that action will also be deleted.

Requesting Changes

In the event an action has been submitted by the employee but, upon further review, you notice that the employee has filled out a form incorrectly; you can send a request to the employee to update the form for resubmission via the  option to the right of the action and selecting "Request Change":

Employment Eligibility Verification (Standard I-9)	45%	9/11/2026		Employee	Requires Action	
Direct Deposit Form (TempWorks Default)	100%	8/19/2026	8/19/2026	None	Completed	
Employee Agreement Sample MH	100%	8/19/2026	8/19/2026	None	Completed	
Background Check Disclosure and Authorization	100%	8/19/2026	8/19/2026	None	Completed	
TempWorks Resume Collection Form	100%	8/19/2026	8/19/2026	None	Completed	
TempWorks WebCenter User Account Setup Form	100%	8/19/2026	8/19/2026	None	Completed	
Direct Deposit Form	100%	8/19/2026	8/19/2026	None	Completed	
Employment Eligibility Verification (Standard I-9)	100%	8/19/2026	8/19/2026	None	Completed	

Request Change
 Edit Action
 Create Action Link

Note Selecting the "Request Change" option will open the "Action Change Request" window. This states that by selecting "Request Change", the form will be unlocked so that the employee can update the information and resubmit for approval:

Action Change Request

An action change request unlocks earlier completed sections of the action for edits and resubmission. If a change is requested for a completed action it would no longer be considered complete; all pages of the action need to be resubmitted to complete the action again.

Advanced

☐ Request a change starting from a specific section

CANCEL

REQUEST CHANGE

Related Articles