

# Onboarding - Terminology

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The following table highlights verbiage that is used within the Onboarding Portal and their relation to TempWorks Software.

| Onboarding Portal      | TempWorks Software | Description                                                                                                                                                                                                                                                   |
|------------------------|--------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Admin Portal/Dashboard | HRCenter Admin     | The web interface where users configure policies, manage tasks, build forms, view candidate progress, and perform other administrative functions.                                                                                                             |
| AI Form Builder        | Form Builder       | The tool within the Onboarding Portal for converting paper documents (PDFs) into interactive digital forms with conditional logic, validation, and e-signature capabilities. The AI form builder can also be used without a PDF by using the AI Chat feature. |
| Automation             | N/A                | A directed graph of decision points and actions that runs when a specific event happens such as the automatic sending of an email once a task has been completed by a candidate.                                                                              |
| Client                 | Customer           | The company or organization where the employee will be working. Also called "Customer" in some contexts.                                                                                                                                                      |
| Compliance Library     | Default Forms      | Pre-built collection of federal and state-required forms (I-9, W-4, state tax withholding forms, etc.) that are automatically kept up-to-date with regulatory changes.                                                                                        |
| Connected Account      | Tenant             | Individual accounts for each employer or desired onboarding tenant.                                                                                                                                                                                           |
| Employee/Candidate     | Employee/Candidate | An Applicant/Candidate/Employee going through the onboarding process within the Onboarding Portal.                                                                                                                                                            |
| Employer               | Employer           | The legal employing entity responsible for compliance. This may be either your staffing agency itself or the client company, depending on the employment relationship and who has W-2 responsibility.                                                         |
| Employer-Ready         | Service Rep Step   | Status indicating that a candidate has completed all required employee-facing tasks and any remaining tasks are waiting for employer action (e.g., I-9 Section 2 verification).                                                                               |
| Entity Type            | Record Type        | Employees, Employers, Clients, and Jobs.                                                                                                                                                                                                                      |
| Form                   | Form               | A digital form template that needs to be completed, signed, or acknowledged by a candidate or employer. Can be from the Compliance Library or a custom form created with the AI Form Builder. Forms are assigned as tasks.                                    |

| Onboarding Portal       | TempWorks Software | Description                                                                                                                                                                                                                                                                            |
|-------------------------|--------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Integration Marketplace | N/A                | Ecosystem of third-party service integrations including background checks (Sterling, Checkr), E-Verify, drug screening (DISA), tax credits (WOTC), and other onboarding services.                                                                                                      |
| Job                     | Job Order          | A position or role that candidates are being placed into. Contains details like job title, description, location, and is associated with a client/customer. Used by the Policy Engine to determine which tasks should be assigned.                                                     |
| Location                | Worksite           | A physical work location or address associated with a job, client, or employer. Used to determine location-specific compliance requirements like state tax forms and labor law posters.                                                                                                |
| Magic Link              | N/A                | A secure, passwordless authentication method that allows seamless sign-in from one system (like TempWorks Beyond) to the Onboarding Portal without requiring separate credentials.                                                                                                     |
| Onboarding URL          | N/A                | A unique, secure link sent to candidates that provides access to their personalized onboarding portal where they can complete all assigned tasks.                                                                                                                                      |
| Organization            | Tenant             | Refers to a sub-account or customer entity. Used when an entity is required to manage multiple distinct accounts.                                                                                                                                                                      |
| Placement               | Assignment         | Represents a candidate's assignment to a specific employer, client, and job. Placements also support custom attributes. When a placement is created, the Policy Engine determines what tasks are relevant given the job, client, employer, employee, and custom attribute information. |
| Policy                  | N/A                | A rule-based configuration that determines which tasks/forms should be assigned to a candidate based on specific criteria including job, address, client, or other attributes. Policies automate the assignment of the intended forms.                                                 |
| Policy Engine           | N/A                | The system that evaluates placement attributes and automatically assigns the correct tasks based on configured policies. This is what determines which forms a candidate needs to complete.                                                                                            |

| Onboarding Portal | TempWorks Software                              | Description                                                                                                                                                                                                          |
|-------------------|-------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Record            | The individual employee, customer, or job order | The individual record for each entity type of employee, employer, client, or job.                                                                                                                                    |
| Task              | Page                                            | An individual onboarding item assigned to a candidate that requires completion (e.g., filling out a W-4, completing an I-9, signing a handbook). Tasks can have both employee-facing and employer-facing components. |
| User              | Service Rep/Administrator                       | An administrator, recruiter, or other internal staff member who has access to the Onboarding Portal dashboard to manage onboarding workflows and view candidate progress.                                            |

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