

Onboarding - How to Setup Policies

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What is a Policy?

A policy is a rule that states: "When a placement matches these conditions, assign these forms."

Note Coming from HRCenter? A Policy can be thought of as a Workflow, now with far more customization options.

Every form that is a part of a placement is there because a policy states to include it. The policy engine decides what forms show up, and for whom.

Instead of having to assign every form to every candidate one by one, policies help streamline and automate the process.

Once you can think in policies, every new requirement maps to a question:

- "What's the rule?"
- "When does it apply?"
- "What does it assign?"

Policies can be found by navigating to the Onboarding Portal > Configuration > Policies:

Policy	Rules	Forms	Tags
3M SOLUTIONS INC Policy - JDK Enabled	This policy applies when the client name is "3M SOLUTIONS INC - Primary."	5	General Light Industrial
Bucky's Shipping Background Auth Enabled Assign Background auth page	This policy applies when Client name is "Bucky's Shipping" (case-sensitive).	1	General
Encom Minnesota Onboarding Policy Enabled Applies onboarding requirements for individuals placed at the client Encom who are working in a Sales role within the state of Minnesota.	This policy applies when Client ID is "ENCOM - Primary" (ignoring case).	8	General Onboarding
General Onboarding Enabled	This policy applies when either Tempworks Branch Name is "St Paul" or Employer name is "TWDemo".	6	General Onboarding
Guardians of the Galaxy Disabled	This policy applies when the Client ID is 425048477.	0	
Heather Test Policy for DD Enabled	This policy applies when Employer name is "Jones" and Job state is "Minnesota" (case-sensitive).	1	
Minnesota State Withholding Disabled This policy requires employees with assigned jobs located in Minnesota to complete their Minnesota W-	This policy applies when the Job state is equal to "MN".	2	

Note You will need the following permissions to access Policies:

- View Policies
- Create Policies

For more information on permissions, please see the article titled [Onboarding - User Groups and Permissions](#).

Before You Begin

Before you are able to begin creating policies, you must have the following:

- At least one form that has been **published** and **deployed**.
 - For more information, please see the article titled [Onboarding - How to Create Forms](#).
- The necessary permissions to create policies.
 - For more information, please see the article titled [Onboarding - User Groups and Permissions](#).

How to Create a Policy

The process consists of three steps:

1. Create the Policy
2. Attach the Forms
3. Enable the Policy

Create the Policy

Navigate to the Onboarding Portal > Configuration > Policies, select "New Policy" at the top right and select "Start from Scratch":

The screenshot shows the 'Policies' page in the Onboarding Portal. The left sidebar has a 'Policies' link highlighted under the 'Configuration' section. The main content area shows a table of existing policies. In the top right corner, there are two buttons: 'New policy' and 'Start from scratch', both of which are highlighted with red boxes.

Policy	Rules	Forms	Tags
3M SOLUTIONS INC Policy - JDK Enabled	This policy applies when the client name is "3M SOLUTIONS INC - Primary."	5	General Light Industrial
Bucky's Shipping Background Auth Enabled Assign Background auth page	This policy applies when Client name is "Bucky's Shipping" (case-sensitive).	1	General
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Guardians of the Galaxy Disabled	This policy applies when the Client ID is 4295048477.	0	
Heather Test Policy for DD Enabled	This policy applies when Employer name is "Jones" and Job state is "Minnesota" (case-sensitive).	1	
Minnesota State Withholding Disabled This policy requires employees with assigned jobs located in Minnesota to complete their Minnesota W-	This policy applies when the Job state is equal to "MN".	2	

Within the "Create a new policy" window, enter a name and a description (optional) for the policy:

Create a new policy

Describe your policy and AI will draft the name, description, and rules.

 Draft with AI

Name *

California DE-4 Withholding Form Requirement

Description

Attaches the DE-4 state tax withholding form for any employee whose job is located in the state of California.

Next, build your Rules. The rule builder lets you set:

- A **fact**: This is what to evaluate (e.g., client.name, job.name, a custom attribute). As you type, you'll see different options available on your account.
- An **operator**: This is how to compare it (is, is not, is in, etc.)
 - Please see the article titled [Onboarding - Policy Rule Operators](#) for the full list.
- A **value**: This is what to compare against (e.g., California).

Rules indicate what has to be true for the policy to apply. Rules evaluate facts about the placement: state, job, employer, client, custom attributes you've defined, and so on. A policy can have one rule or several combined together and you can require all conditions to match (an "And" group) or any of them to match (an "Or" group):

Rules

Job state



is in



CA, California

Aa

+ Add condition ▾

+ Add group ▾

This policy applies when Job state is one of "CA" or "California" (case-sensitive).

Note Conditions are exact-match (case sensitive) by default. California (capital C) won't match california (lowercase), and Forklift Driver (capital F and D) won't match forklift driver (lowercase). Make sure the value matches **exactly** what's stored on placements.

This can be configured via the "Aa" button when adding/editing the rules and form conditions. If enabled, the rule/condition is case-sensitive. If disabled, the rules will match regardless of case-sensitivity ("California", "california", and "CALIFORNIA" will all match):

Rules

Job state	is in	CA, California	Aa
+ Add condition + Add group			

Optionally, you can add any "Tags" you use to organize policies:

Tags

General General Onboarding

Note If you'd rather start from a description, the "Draft with AI" at the top of the form:

Create a new policy

Describe your policy and AI will draft the name, description, and rules.

 Draft with AI

Name *

Description

Describe what the policy should do in plain English ("attach the DE-4 to anyone hired in California") and select "Draft Policy":

Describe your policy



AI will draft the name, description, and rules. Review and edit before saving.

Try:

Specific employers

By state

Exclude a client

Attach the DE-4 to anyone hired in California



 Draft policy

The AI will pre-fill the name, description, and rules. You can edit any of the information before saving. If everything looks the way you want it to, select "Use This Draft":

Describe your policy



AI will draft the name, description, and rules. Review and edit before saving.

Try: Specific employers By state Exclude a client

Attach the DE-4 to anyone hired in California

 Draft policy

Name

California DE-4 Withholding Form Requirement

Description

Attaches the DE-4 state tax withholding form for any employee whose job is located in the state of California.

Rules

 Rules look good.

```
{ "fact": "job.address.state", "operator": "in", "value": [ "CA",  
"California" ], "ignoreCase": false }
```

Cancel

Use this draft

Please keep in mind that you will still need to add the forms to the policy. The AI will not add the forms.

Once everything has been configured to your requirements, select "Create Policy":

Create a new policy

Describe your policy and AI will draft the name, description, and rules.

 Draft with AI

Name *

California DE-4 Withholding Form Requirement

Description

Attaches the DE-4 state tax withholding form for any employee whose job is located in the state of California.

Rules

Job state



is in



CA, California

Aa

+ Add condition

+ Add group

This policy applies when Job state is one of "CA" or "California" (case-sensitive).

Tags

Select a tag...



Cancel

Create Policy

You will then be navigated to the policy's detail page where we will be adding the form(s).

Attach the Forms

Within the policy details page, navigate to the Forms section and select the "Select forms to add" option:

Forms

Select forms to add

Name

Conditions

No results.

Search for the form(s) you want to add to the policy, select the form(s) within the list, and select "Add # Form" to add the form(s) to the policy:

Forms

Name	Conditions
No results.	

Select forms to add 1 selected ✕ Add 1 form

Q de-4

☒ California State Withholding [DE-4]

Note Optionally, for any form included within a policy that should only be assigned under additional conditions, select "Add Conditions" in its row and set a form-level rule:

California DE-4 Withholding Form Requirement Disabled

Basic Information

ID

pcy_01m3sga911fxyb51td5krk7evr

Description

Attaches the DE-4 state tax withholding form for any employee whose job is located in the state of California.

Tags

General General Onboarding

Rules

This policy applies when

^ Hide logic

Job state is in CA, Ca

Forms

Name	Conditions
California State Withholding [DE-4]	Add condition

Add Condition: California State Withholding [DE-4] ✕

This form will only be included when these conditions match.

Rules

Add conditions to define when this applies.

+ Add condition + Add group ▼

Add a condition above to see what this means.

Cancel Save

Select forms to add

Select forms to add

1 selected ✕ Add 1 form

Q de-4

☒ California State Withholding [DE-4]

Imagine a "Warehouse Onboarding" policy that applies to **all** warehouse staff. Most forms (Hard Hat Acknowledgment, Safety Briefing) should be assigned to everyone in the warehouse. But the Forklift Certification should only be assigned to actual forklift drivers and not to every warehouse hire.

This is where Form-Level Conditions come in:

- **Rules:** "placement.custom_attributes.location" is "Warehouse"
- **Forms:**
 - Hard Hat Acknowledgment with no conditions set; assigned to every warehouse hire
 - Safety Briefing with no conditions set; assigned to every warehouse hire
 - Forklift Certification with the **"Condition" of: "job.name" is "Forklift Driver"**
- **Status:** "Enabled"

Now when a warehouse placement is created, the policy's rules are checked first. If they match, it then checks each form's conditions. The Hard Hat and Safety Briefing forms are assigned to every warehouse hire while the Forklift Certification is assigned only to forklift drivers.

Form-Level Conditions let you bundle related onboarding requirements into one policy instead of spreading them across many, keeping the right form on the right placement, without an abundance of overlapping policies.

Forms without any conditions are assigned whenever the policy matches.

Once the forms have been added, the policy is ready to be enabled.

Enable the Policy

Newly created policies start as disabled and will need to be manually enabled.

Select "Enable Policy" in the top right of the policy details page:

The screenshot shows the top of a web interface. At the top right, there are four buttons: 'Copy to Test Mode', 'Edit', 'Enable Policy' (highlighted with a red box), and 'Delete'. Below the header, a yellow warning banner states: 'This policy is currently disabled and will not be evaluated for placement compliance requirements. Use "Enable Policy" above to turn it back on.' The main heading is 'California DE-4 Withholding Form Requirement' followed by a 'Disabled' status badge. Under 'Basic Information', the ID is 'pcy_01m3sga911fxyb51td5krk7evr', the description is 'Attaches the DE-4 state tax withholding form for any employee whose job is located in the state of California.', and the tags are 'General' and 'General Onboarding'.

The policy details page will now show the "Status" as "Enabled":

California DE-4 Withholding Form Requirement **Enabled**

Basic Information

This screenshot shows the same policy details page but with the status changed to 'Enabled', indicated by a green badge. The 'Basic Information' section shows the same ID, description, and tags as the previous screenshot.

Once enabled, the policy can be tested and utilized throughout your business.

Testing the Policy

To test that the policy is working as intended, create a test placement that should match your policy's rules. The forms you attached should appear on that placement automatically.

In the event they do not, check...

- That the policy's "Status" is "Enabled". A disabled policy will not trigger even if the rules match.
- That the values in your rule match what is stored on the placement exactly, case included.
- If you set per-form Conditions as those need to match as well. Forms whose form-level conditions do not match will not be assigned even if the policy itself matches.
- If the policy was enabled before the placement was created. Policies don't re-evaluate retroactively on existing placements when you change them. Instead, you will need to manually re-run the policy evaluation.

Additional Policy Options

With the appropriate permissions, you will have the ability to...

- Edit a Policy
- Disable a Policy
- Delete a Policy

These options can be selected at the top right of the policy details page:

Policies / California DE-4 Withholding Form Requirement

Copy to Test Mode

Edit

Disable Policy

Delete

California DE-4 Withholding Form Requirement

Enabled

Basic Information

ID

pcy_01a3ga911fxyb51td5knk7evr

Description

Attaches the DE-4 state tax withholding form for any employee whose job is located in the state of California.

Tags

General

General Onboarding

Related Articles