Onboarding - How to Setup Policies

Last Modified on 10/02/2026 3:06 pm CDT

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.

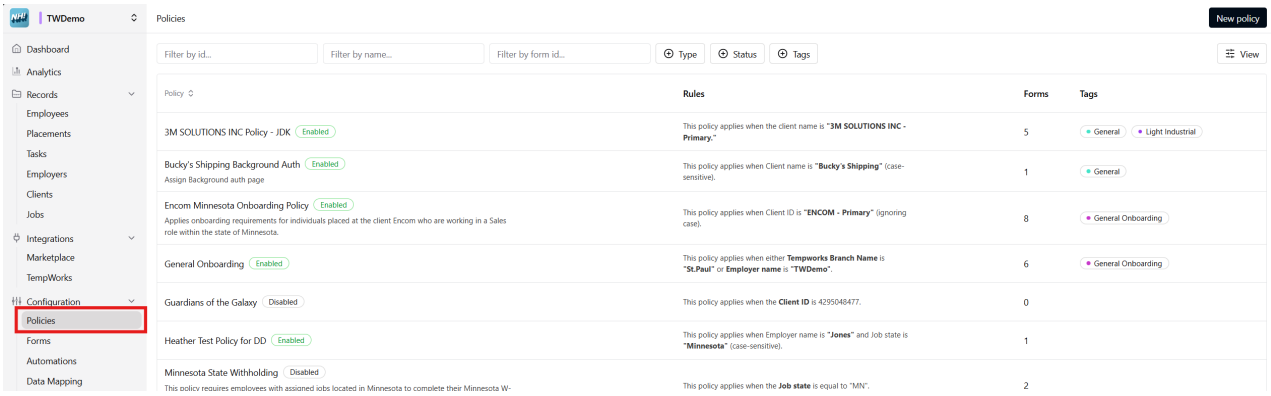
Every form that is a part of a placement is there because a policy states to include it. The policy engine decides what forms show up, and for whom.

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:



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.

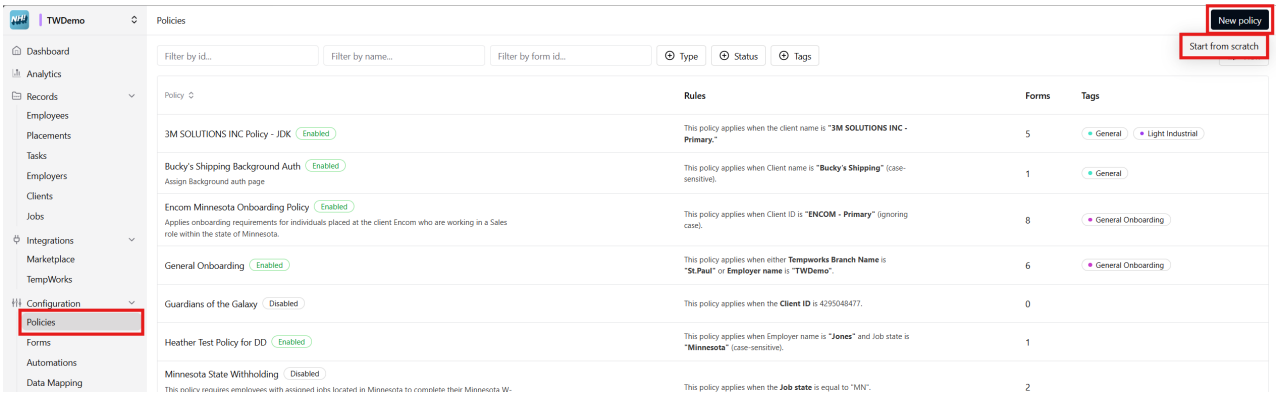
How to Create a Policy

The process consists of three steps:

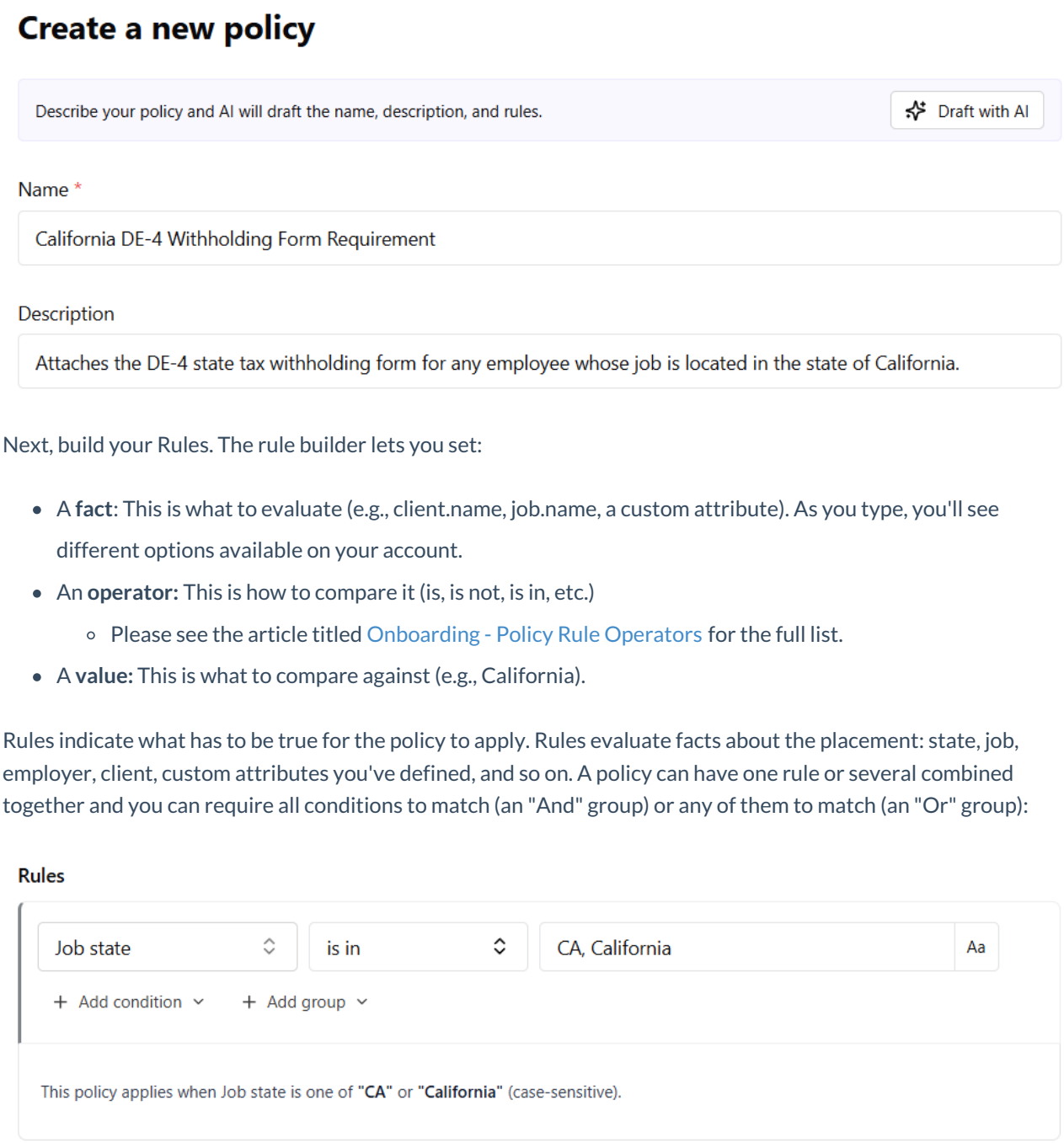
1. Create the Policy
2. Attach the Forms
3. Enable the Policy

Create the Policy

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



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



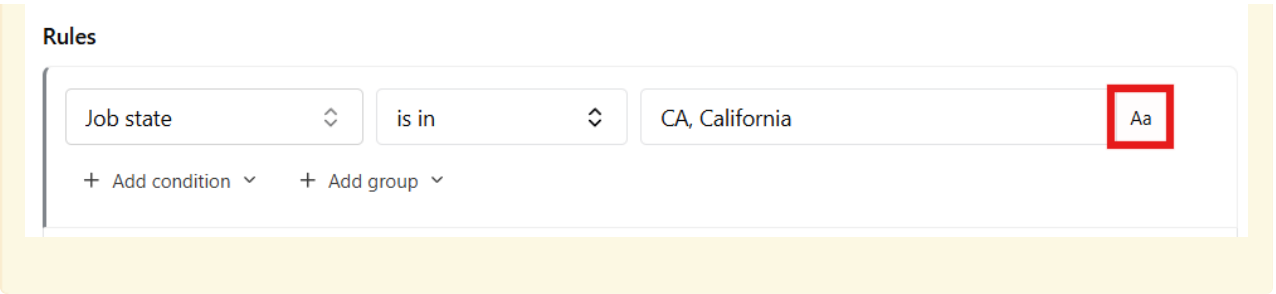
Next, build your Rules. The rule builder lets you set:

- 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).

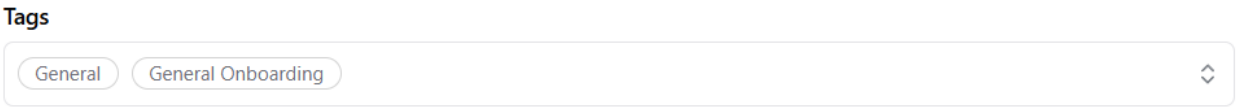
Rules indicate what has to be true for the policy to apply. Rules evaluate facts about the placement: state, job, employer, client, custom attributes you've defined, and so on. A policy can have one rule or several combined together and you can require all conditions to match (an "And" group) or any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

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.

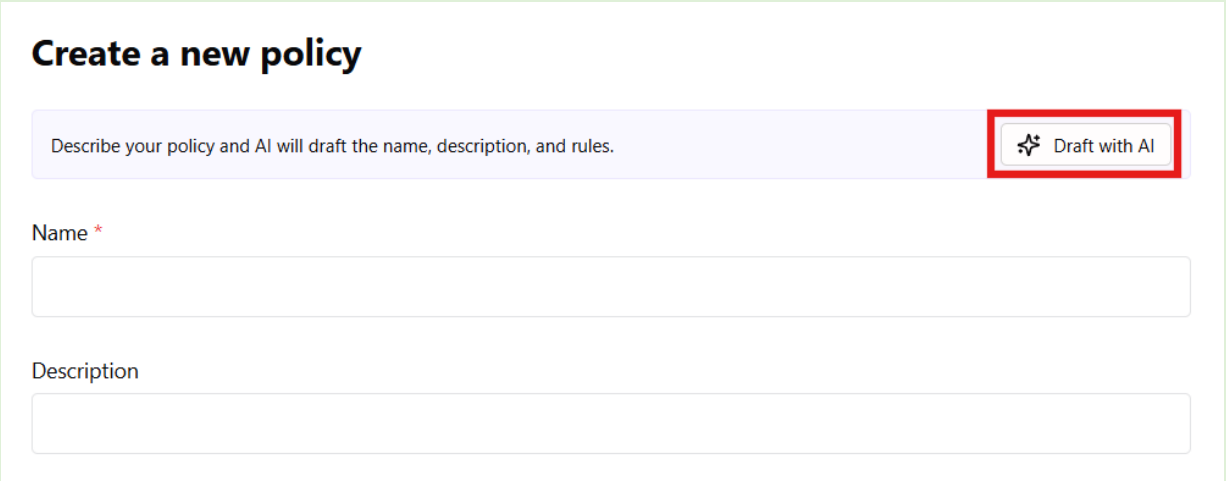
This can be configured via the "Aa" button when adding/editing the rules and form conditions. If enabled, the rule/condition is case-sensitive. If disabled, the rules will match regardless of case-sensitivity ("California", "california", and "CALIFORNIA" will all match):



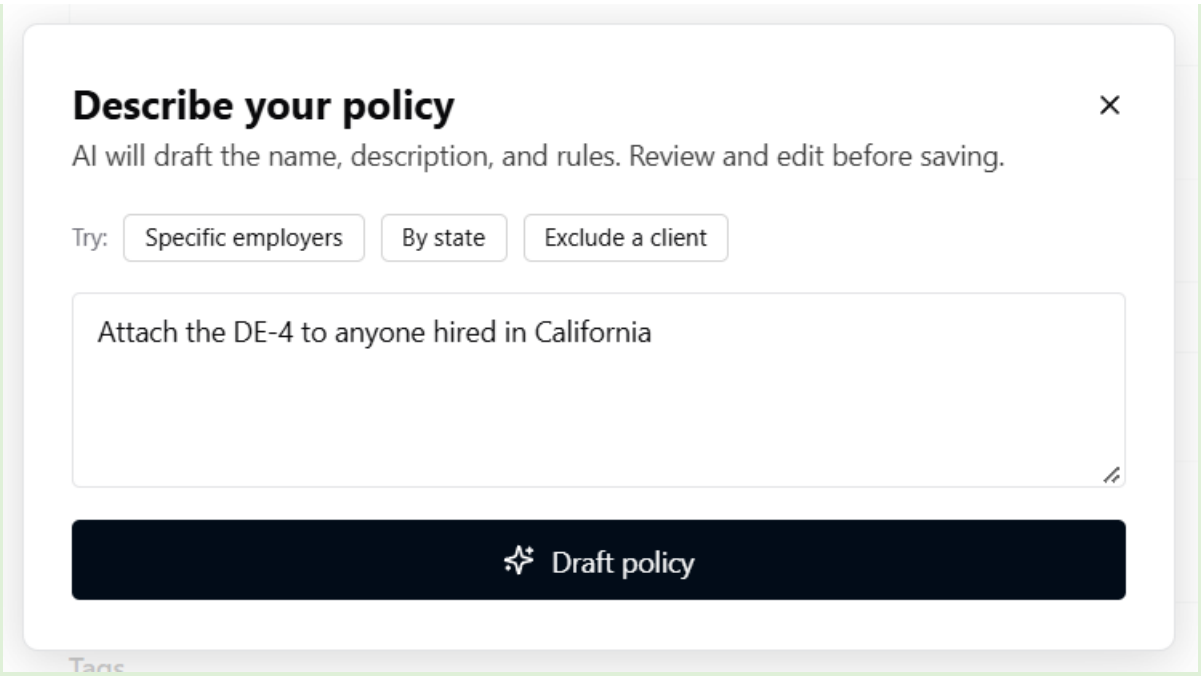
Optionally, you can add any "Tags" you use to organize policies:



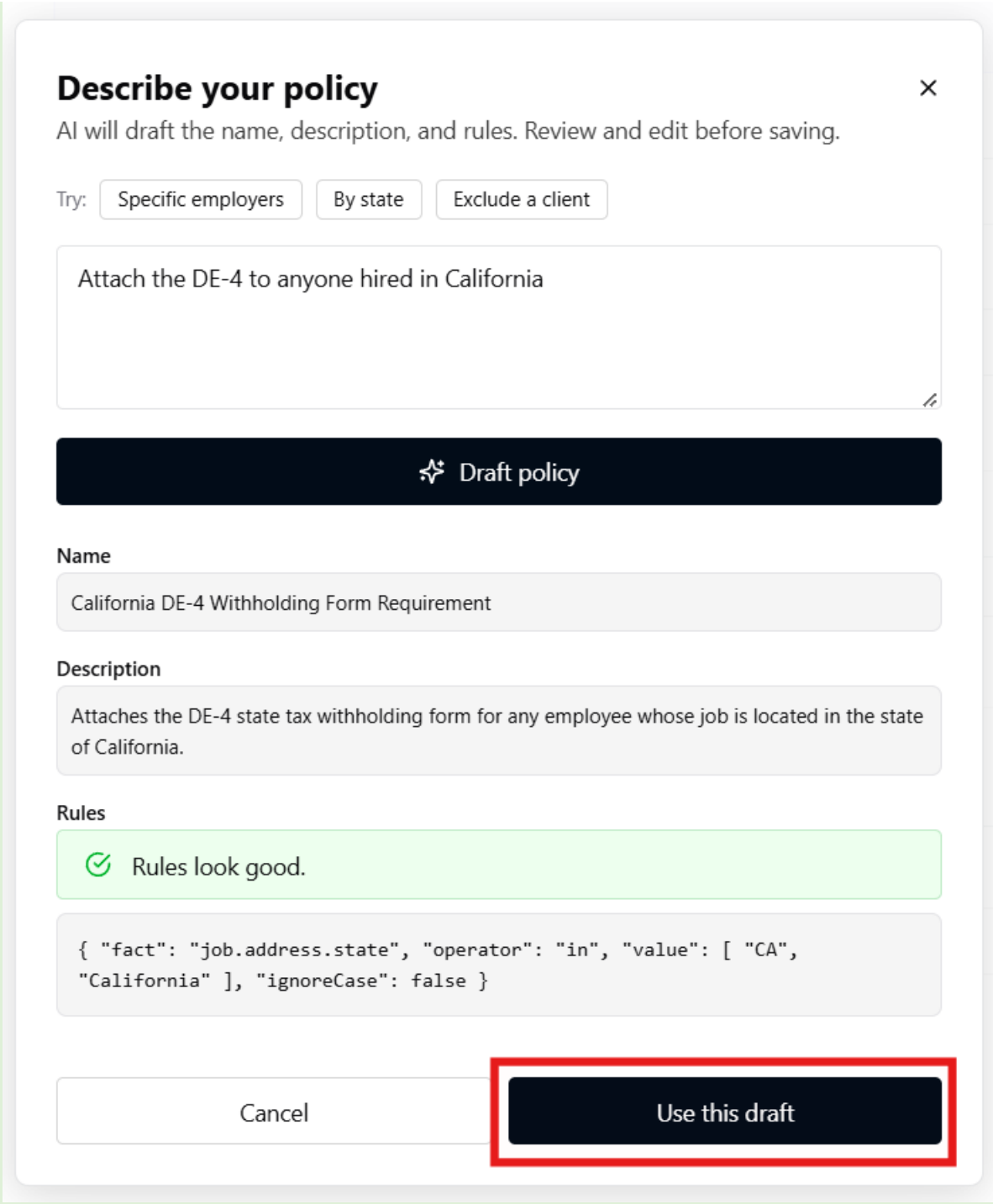
Note If you'd rather start from a description, the "Draft with AI" at the top of the form:



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

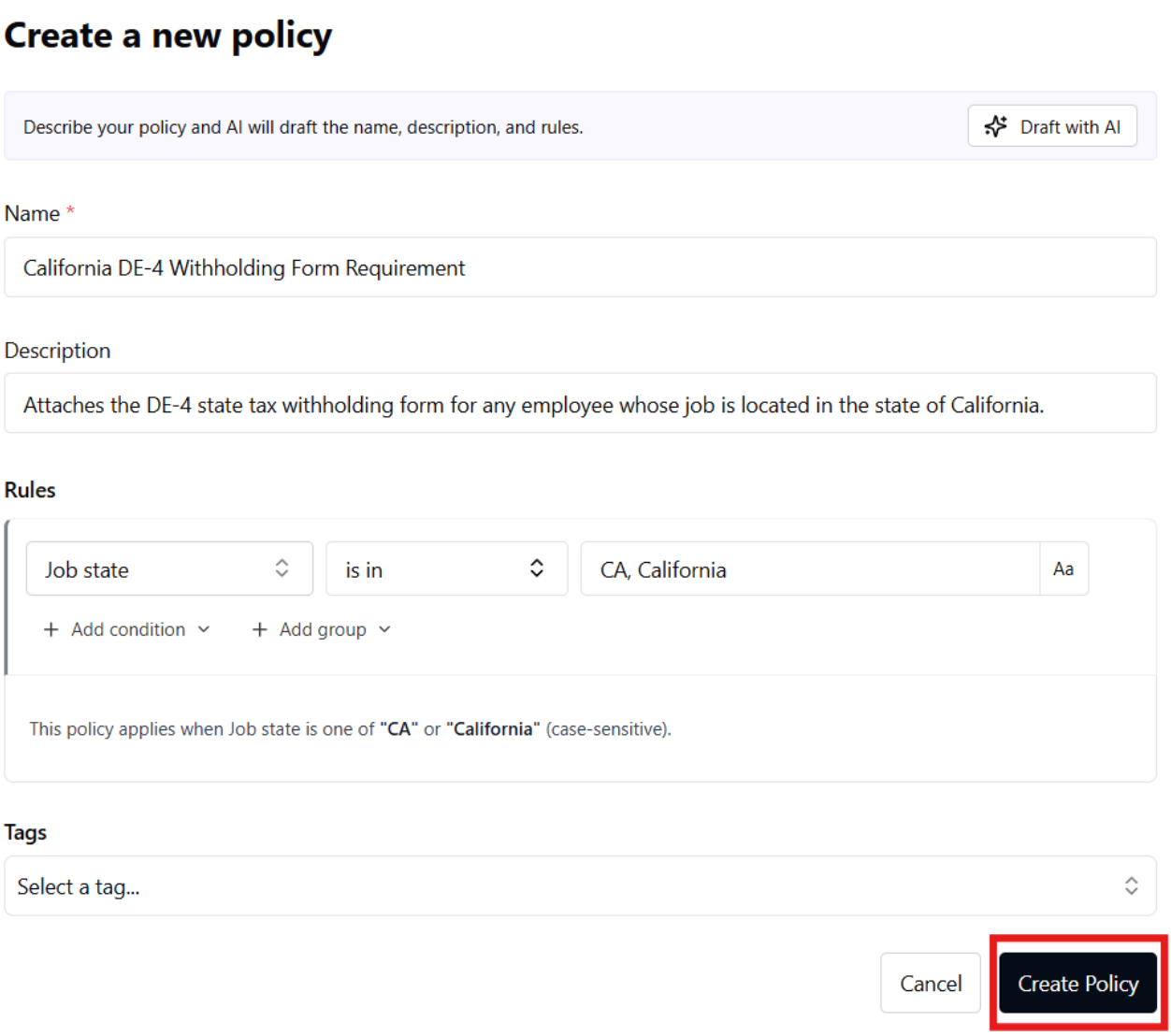


The AI will pre-fill the name, description, and rules. You can edit any of the information before saving. If everything looks the way you want it to, select "Use This Draft":



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

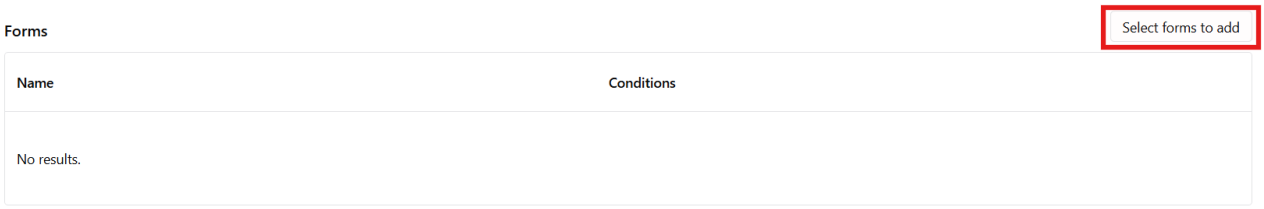
Once everything has been configured to your requirements, select "Create Policy":



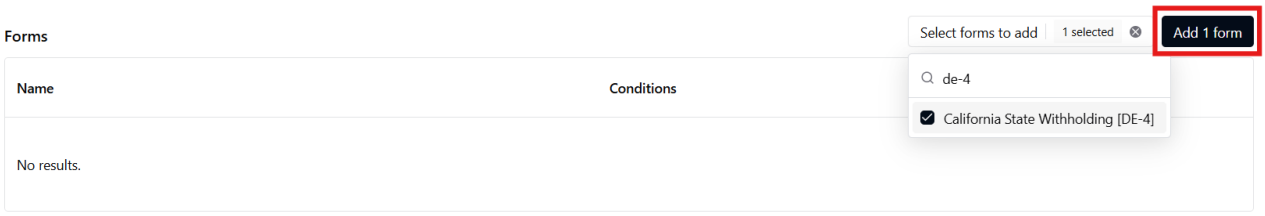
You will then be navigated to the policy's detail page where we will be adding the form(s).

Attach the Forms

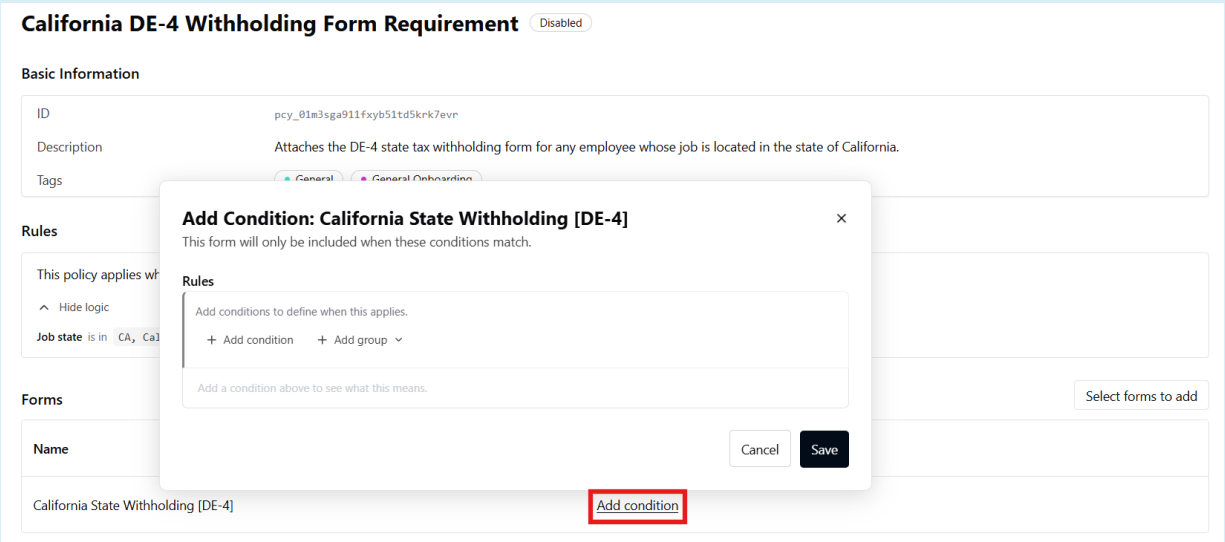
Within the policy details page, navigate to the Forms section and select the "Select forms to add" option:



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:



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:



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.

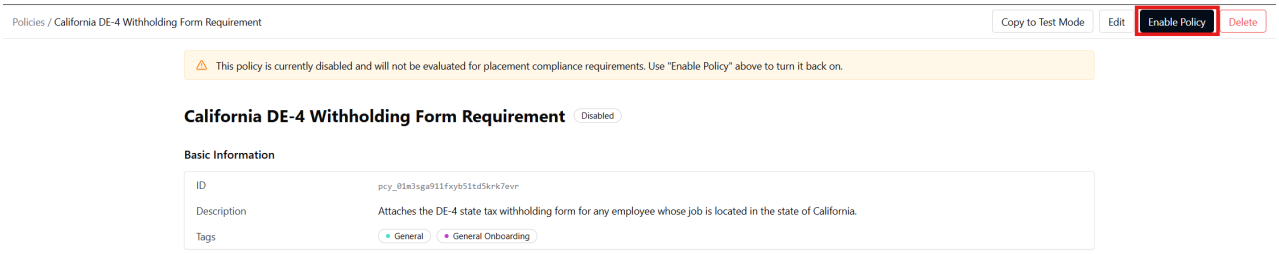
Forms without any conditions are assigned whenever the policy matches.

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

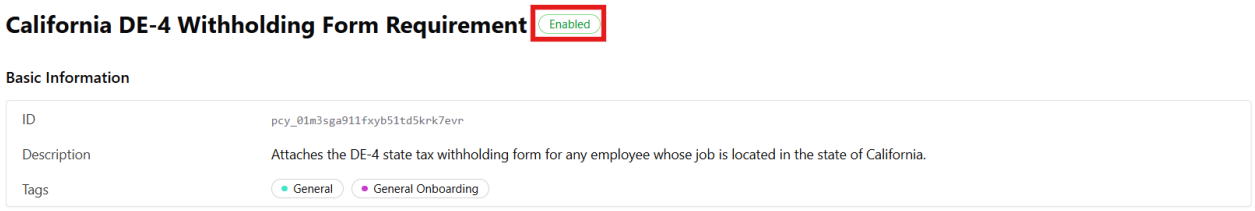
Enable the Policy

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



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...

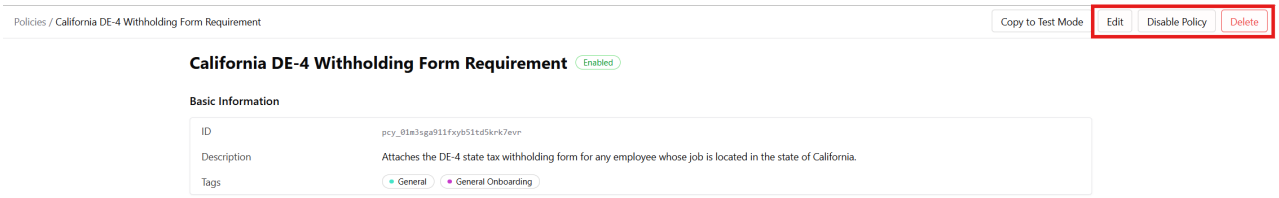
- That the policy's "Status" is "Enabled". A disabled policy will not trigger even if the rules match.
- That the values in your rule match what is stored on the placement exactly, case included.
- If you set per-form Conditions as those need to match as well. Forms whose form-level conditions do not 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:



Related Articles