

Onboarding - How to Create Forms

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What are Forms?

A form is a reusable template. It defines what a candidate sees and does at a step in their onboarding workflow. You build a form once and it can be used across any placement it is added to.

Forms collect information including name, address, document upload, whatever the situation calls for, but they also do so much more...

- A form can also display information such as rich text, embedded videos, content blocks that pull in the candidate's name or any custom attribute.
- Combined with a signature field, a form becomes an acknowledgment such as a digital handbook the candidate reads and signs, an offer letter they confirm receipt of, a safety policy they attest to.
- And forms are also where you configure and execute integrations such as running a background check with a specific vendor package, syncing data to an HRIS, or kicking off any other connected workflow.

So a form is four things at once:

- A way to collect data from candidates.
- A way to display information to candidates.
- A way to capture acknowledgment via e-signature.
- A way to trigger integrations with external systems.

Most real-world onboarding forms blend two or more of these...

- A state tax form walks through the rules, collects the inputs, and ends with a signature.
- An employee handbook displays the policy with embedded video and ends with an e-signature.
- An offer letter renders the candidate's name, role, and pay rate from variables, then captures their acceptance.
- A background check form configures which vendor package to run, then kicks off the case as soon as the candidate submits.

Forms are accessible via the Onboarding Portal > Configuration > Forms:

Name	Status	Uploaded by	Batch	AI build	Waiting for	Added
State Capitals Quiz	Draft	derek.palm@tempworks.co...	3 weeks ago	Built	TWDemo	2026/9/9 11:40
Idaho State Withholding [ID W-4]	Deployed					2024/4/17 15:00
Michigan State Withholding [MI W-4]	Deployable					2024/4/17 10:55
Maine State Withholding [W-4ME]	Deployed					2024/4/15 17:06
Connecticut State Withholding [CT-W4]	Deployed					2024/4/9 16:29
Arizona State Withholding Election [A-4]	Deployed					2024/3/13 22:20
Wisconsin State Withholding [WT-4]	Deployable					2024/3/13 22:02

Note You will need the following permissions to access Forms:

- View Forms
- Create Forms

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

Creating a Form

Forms can be created via the following methods:

- Manually
- Uploading a File
- AI Form Builder

For this article, we will run through an example of uploading a file that will also utilize the AI Form Builder.

Begin by navigating to the Onboarding Portal > Configuration > Forms and select "New Form":

Name	Status	Uploaded by	Batch	AI build	Waiting for	Added
State Capitals Quiz	Draft	derek.palm@tempworks.co...	3 weeks ago	Built	TWDemo	2026/9/9 11:40
Idaho State Withholding [ID W-4]	Deployed					2024/4/17 15:00
Michigan State Withholding [MI W-4]	Deployable					2024/4/17 10:55
Maine State Withholding [W-4ME]	Deployed					2024/4/15 17:06
Connecticut State Withholding [CT-W4]	Deployed					2024/4/9 16:29
Arizona State Withholding Election [A-4]	Deployed					2024/3/13 22:20

Either drag and drop the file(s) into the field or select "browse your computer" to locate the file(s):

Note Up to 50 files can be uploaded at a time.

New forms

Upload documents or paste text, and we'll turn them into digital forms



Drop files here
or browse your computer

Accepts .pdf, .html, .txt, .json, .md, .csv, and .zip files · up to 50 at a time

or

Describe the form you want to build...

 Add to list

OTHER OPTIONS



Create a New Form
Build from scratch

>

Once the files have been added, rename any file whose filename isn't the form name you want. The name you set here becomes the form's name within the Onboarding Portal:

Files 1 of 50 Clear all

**Settings for all forms**
Employer · No tags · English

Forms to create 0 with own settings

**Employee Handbook**
PDF · Auto-detect • Ready

Drop files or paste text to add more.

1 form Create 1 form

PDF upload • Ready Remove

Employee Handbook

Form name ⓘ

Document type ⓘ

Description · optional

Overwrite settings for this form
When enabled, the settings below will overwrite common settings from the batch

☐

Source file

Employee-Handbook-for-Nonprofits-and-Small-Businesses.pdf · 40 pages · 399.6 kB

Set the "Document Type" on each file or keep it on "Auto-Detect":

PDF upload Ready Remove

Employee Handbook

Form name ?

Employee Handbook

Description · optional

Leave blank and we'll write one from the content

Overwrite settings for this form
When enabled, the settings below will overwrite common settings

Document type ?

Auto-detect

- ✓ Auto-detect
- Handbook / posters
- Policy / disclosure
- Tax / withholding
- Identity / document verification
- Quiz / training test
- Generic

Within the "Settings for all forms" window, select the intended "Output Language", add any relevant "Tags" and, once complete, select "Create # Forms":

Files 1 of 50 Clear all

Settings for all forms
Employer · No tags · English

Forms to create 0 with own settings

Filter by form or file name

Employee Handbook PDF · Handbook / posters Ready

Drop files or paste text to add more.

1 form

Settings for this form
Applied to every form that does not have its own settings. A form with own settings keeps them.

Output language ?

English

Task reuse criteria ?

1 selected

Tags

Select a tag...

Placements with matching **Employer** share the same task.

☐ Request Onboarded support
Our team reviews the generated forms before they go live. You can leave instructions on each form.

Create 1 form

A banner will display that states the form is currently being built by the AI Form Builder. The status can be tracked by selecting "Track this upload" within the banner:

New forms

Upload documents or paste text, and we'll turn them into digital forms

✓ 1 form is being built. They'll appear in your forms list as they're ready — you can keep adding more here. [Track this upload](#)



Drop files here
or browse your computer

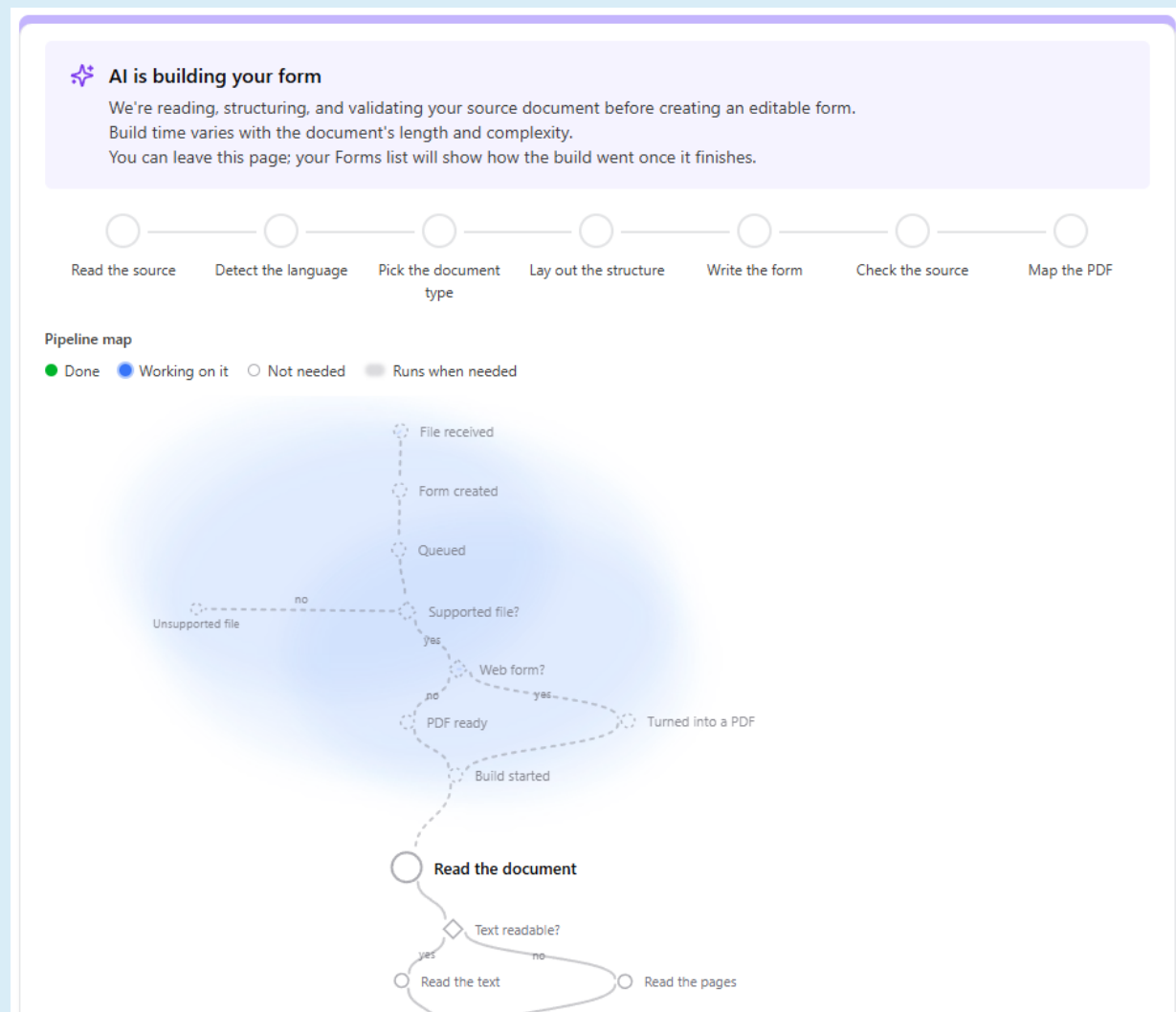
Accepts .pdf, .html, .txt, .json, .md, .csv, and .zip files · up to 50 at a time

or

Describe the form you want to build...

Add to list

Note The form creation process may take an extended period of time depending on the number of files being uploaded:



Once the AI Form Builder has finished creating the form based on the uploaded file, if successful, you will see the form have the status of "Built":

My Forms							
Filter by name...		Tags	Type	Waiting for	AI build	Uploaded by	Batch
							View
☐	Name	Status	Uploaded by	Batch	AI build	Waiting for	Added
☐	Employee Handbook	Draft	joshua.kramer@tempworks...	6 minutes ago	Built	TWDemo <1h	2026/10/2 13:36

Reviewing the Form

Selecting the form will navigate you to that form's dashboard. Within this dashboard, you can add/edit the following:

- Display Name
- Display Description
- Release Notes
- Days Before Task Due

Draft (Editable)
tt_01m3yye1grf7f8kepgmjt看1an0
Deploy (Live Mode)
Open Editor

Display Name
Employee Handbook

Display Description
Employee Handbook and Acknowledgment Form

This is the name and description that candidates see. They are set to the form name/description when a version is first created. You can modify them here for specific versions.

Release Notes
Initial release

Days Before Task Due

When this field is set, tasks are due this number of days after creation.

It is also within the form's dashboard where you can...

- Deploy the form to be assigned to employees for completion.
- Edit the form to make any necessary changes before redeployment.
- Preview the form to review any changes.
- Delete the form if it is no longer needed within the organization.

Draft (Editable)
tt_01m3yye1grf7f8kepgmjtw1an0

Deploy (Live Mode)
Open Editor

Preview
Version History
Deprecate
Delete

Display Name
Employee Handbook

Display Description
Employee Handbook and Acknowledgment Form

This is the name and description that candidates see. They are set to the form name/description created. You can modify them here for specific versions.

Release Notes
Initial release

Days Before Task Due

When this field is set, tasks are due this number of days after creation.

To continue with the example, let's go ahead and select "Open Editor" to verify how the AI has built the form.

Within the Form Builder, we can see how our entire employee handbook has been added as a form, including a link to the multi-page PDF handbook that we have uploaded along with the generated field for the employee signature:

Employee Handbook
Draft

Canvas
PDF
Translations

PAGES - 1

Acknowledgment
Employee

Please review the [Employee Handbook]...
form.content_1

I acknowledge that I have received a cop...
form.content_2

* Signature of Employee
form.signature_of_employee

Acknowledgment

Please review the [Employee Handbook](#) by clicking [here](#). This handbook covers: Welcome; Workplace Commitments; Company Policies and Procedures; Employment Classification; Attendance Policies; Leave Policies; Work Performance; Discipline Policy; Employee Health and Safety; Employee Benefits; and Termination Policies.

I acknowledge that I have received a copy of the Employee Handbook. I understand that I am responsible for reading the information contained in the Handbook.

I understand that the Handbook is intended to provide me with a general overview of the company's policies and procedures. I acknowledge that nothing in this Handbook is to be interpreted as a contract, expressed or implied, or an inducement for employment, nor does it guarantee my employment for any period of time.

I understand and accept that my employment with the company is at-will. I have the right to resign at any time with or without cause, just as the company may terminate my employment at any time with or without cause or notice, subject to applicable laws. I understand my at-will employment cannot be altered by any verbal statement or alleged verbal agreement made by company personnel. It can only be changed by a legally binding, written contract covering employment status.

I acknowledge that the company may revise, suspend, revoke, terminate, change or remove, prospectively or retroactively, any of the policies or procedures of the company, whether outlined in this Handbook or elsewhere, in whole or in part, with or without notice at any time, at the company's sole discretion.

* Signature of Employee

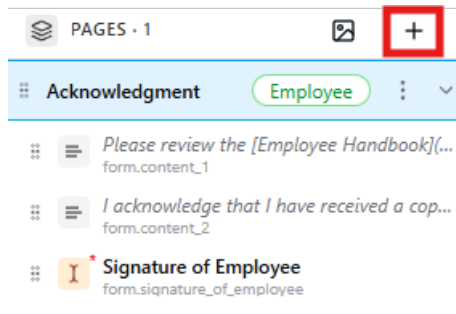
Signature

Note Always remember to review the generated field mappings. AI output is a strong starting point but always spot-check.

Adding an Employer Page

While we are currently capturing the employee signature to confirm their reviewing of the handbook, we also need the employer to sign.

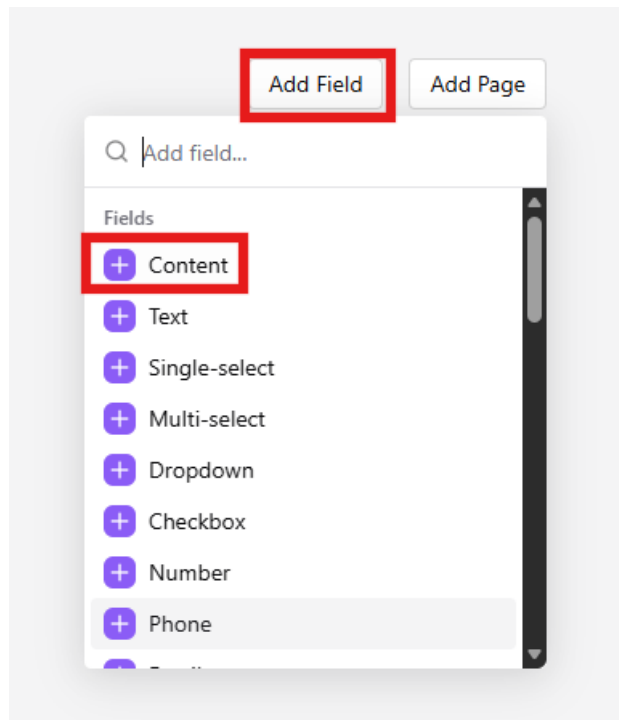
For this, we will want to add an additional page by selecting the "+" at the top left of the form builder to open the "Add a page" window:



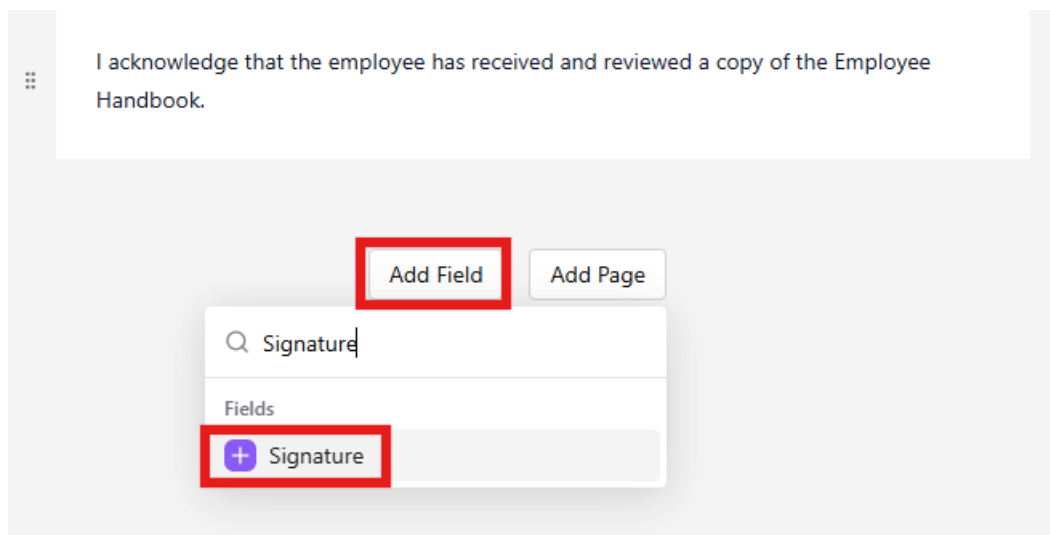
Within the "Add a page" window, enter the name of the page and select "Employer" from the "Assignee" dropdown. Select "Add page":

A screenshot of a dialog box titled 'Add a page'. At the top right is a close button (X). Below the title is the text 'Optionally enable add-ons for extra capabilities.' There are two input fields: 'Page name' with the text 'Employer Signature' and 'Assignee' with a dropdown menu showing 'Employer'. Below these is a section for 'Add-ons (optional)' with the text 'Layer extra capabilities onto this page. You can change these later from page settings.' There are two add-on options: 'Quiz' (with a 'New' tag) and 'Require authentication' (with a 'New' tag). At the bottom right are two buttons: 'Cancel' and 'Add page'.

Within the new page, select "Add Field" and select "Content" as we want to include confirmation text that the employee has received and reviewed the handbook:



Add the appropriate information within the "Content" block and then select "Add Field" and select "Signature":



We can open the settings of the signature field by selecting the gear icon to verify the field is setup how we want:

Signature formfield_01m3z22...

form.signature_5382

Require handwritten signature ?

Signature Field Configuration

Configure how the signature name is collected and displayed

How This Field Works

- **Template Mode:** Pulls name from existing form data (e.g., employee.first_name)
- **Manual Entry Mode:** User types their name when signing
- **Mixed Mode:** Falls back to manual entry if template data is missing

Template Paths

Enter field paths (one per line) to build the signature name. Leave empty to allow manual name entry.

employee.first_name
employee.last_name
or leave empty for manual entry

Manual entry: Users will type their name

Delete Save

With the form content configured how we want, we can now decide whether a form translation is needed.

Adding a Form Translation

Forms support translations at the "version" level. Each language is added as a separate translation while the version is within a "Draft" status. Once the version is published, its translations are locked.

Note Candidates see the form in their selected language. An employee who picks Spanish sees Spanish labels, help text, and options as they fill the form out.

Once the form is submitted, the underlying field paths and entered information within the form stay consistent in English.

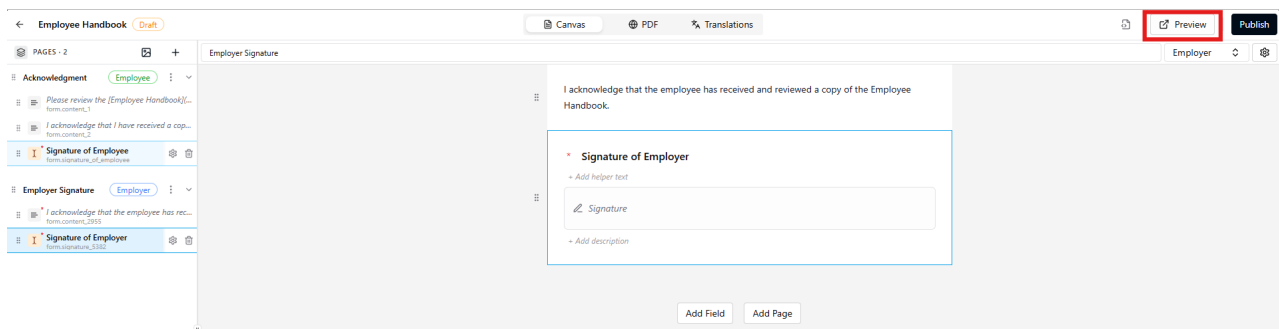
If a signed document has to be in the employee's own language for your records or for a regulator, you will need a separate form built on a PDF in that specific language, and a policy that assigns it based on the employee's preferred language.

For instructions on adding a language to a form, please see the article titled [Onboarding - Form Translations](#).

Once complete, we are ready to preview the form before publishing and deploying.

Previewing the Form

Select "Preview" at the top right to open a preview of the form and allow us to run through the steps with test data:



The screenshot shows the 'Employee Handbook' form in a 'Draft' state. The interface includes a top navigation bar with 'Canvas', 'PDF', and 'Translations' tabs. On the right, there are 'Preview' and 'Publish' buttons, with 'Preview' highlighted by a red box. A left sidebar lists the form's pages: 'Acknowledgment' (Employee), 'Signature of Employee' (Employee), 'Employer Signature' (Employer), and 'Signature of Employer' (Employer). The main area displays the 'Employer Signature' page, which contains a text block stating 'I acknowledge that the employee has received and reviewed a copy of the Employee Handbook.' Below this is a signature field labeled 'Signature of Employer' with a placeholder for a signature and an 'Add description' option. At the bottom, there are 'Add Field' and 'Add Page' buttons.

Within the preview, we can complete the steps provided within the form, including the signing as the employee and employer:

Employee Handbook

Please review the [Employee Handbook](#) by clicking [here](#). This handbook covers: Welcome; Workplace Commitments; Company Policies and Procedures; Employment Classification; Attendance Policies; Leave Policies; Work Performance; Discipline Policy; Employee Health and Safety; Employee Benefits; and Termination Policies.

I acknowledge that I have received a copy of the Employee Handbook. I understand that I am responsible for reading the information contained in the Handbook.

I understand that the Handbook is intended to provide me with a general overview of the company's policies and procedures. I acknowledge that nothing in this Handbook is to be interpreted as a contract, expressed or implied, or an inducement for employment, nor does it guarantee my employment for any period of time.

I understand and accept that my employment with the company is at-will. I have the right to resign at any time with or without cause, just as the company may terminate my employment at any time with or without cause or notice, subject to applicable laws. I understand my at-will employment cannot be altered by any verbal statement or alleged verbal agreement made by company personnel. It can only be changed by a legally binding, written contract covering employment status.

I acknowledge that the company may revise, suspend, revoke, terminate, change or remove, prospectively or retroactively, any of the policies or procedures of the company, whether outlined in this Handbook or elsewhere, in whole or in part, with or without notice at any time, at the company's sole discretion.

* Signature of Employee

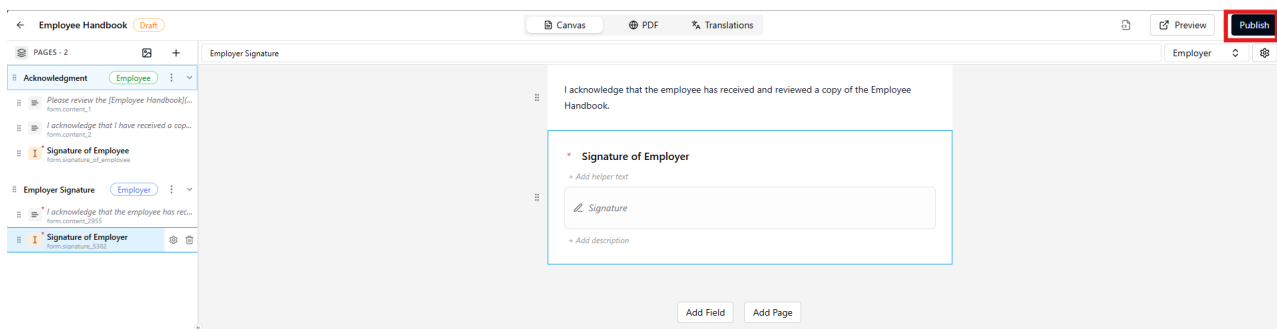
 John Doe  

Save & Next >

Once we have finished previewing that the form functions as intended, we can move to publishing and deploying the form for employees to complete.

Publishing and Deploying the Form

Close the "Preview" window and back within the Form Builder, select "Publish" at the top right:



Within the "Deploy Form Version" window, select "Deploy (live)":

Deploy Form Version

This action cannot be undone. The version will be published (if draft) and deployed to live mode so that it can be used by new tasks.

Languages Summary ?

Locale	Status	Progress
English	Visible to candidates	5/5

Release Notes ?

Initial release

☒ Mark the build status as done (non-reversible)
 ☒ Deprecate all currently published blueprint versions.

Cancel

Deploy (live)

At this point, if you have a policy created that you want to immediately add the form to, select it from the dropdown. Or you can create a new policy with this form. If you do not want to add the form to a policy at this time, select "Cancel":

Note For more information on creating policies, please see the article titled [Onboarding - How to Setup Policies](#).

Add to Policy

×

Add this form to a policy so it can create tasks under placements.

Select an existing policy

3M SOLUTIONS INC Policy - JDK⌵

Create a new policy

Start fresh with a new onboarding policy.

Cancel

Add form to policy

With the form published and deployed, in the event any additional edits are required, a new "Draft" version of the form will need to be created:

Versions 1Tasks 0Expiration Rules 0

Deployed (Read-only)

PreviewNew Draft⋮

tt_01m3z0bj5pe4s92a2x3vv0xg8f

Display Name	Employee Handbook
Display Description	
Version	1.0.0
Release Notes	Initial release
Days Before Task Due	–
Assigned Tasks	0
Deployed	6 minutes ago

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