

Onboarding - Form Sequencing & Stages

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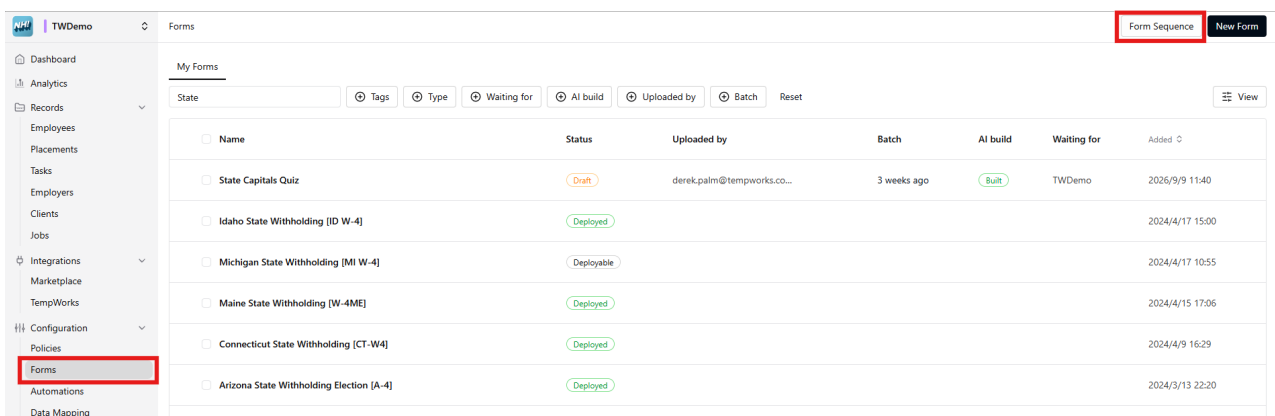
Overview

When adding forms to a policy, you may want employees to complete the forms with a specific order. This is where sequencing and stages come in.

- **Sequencing** sets the order forms show up in. The employee can still utilize the top navigation bar to fill out forms in whatever order they like.
- **Stages** gate the forms. The employee can't get to Stage 2 until everything in Stage 1 is complete, can't reach Stage 3 until Stage 2 is complete, and so on.

Sequencing is a suggested order of the forms and **stages** enforce the order.

Sequencing and Stages can be accessed via the Onboarding Portal > Configuration > Forms > Form Sequence:



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

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](#).

When to Use Sequencing vs Stages

Use **sequencing** when you want forms to appear in a sensible order but don't mind if the employee jumps ahead.

Good for when there's a natural flow but no hard dependency.

Use **stages** when the order of the forms within the workflow matters, and one step has to clear before the rest make sense.

- The classic stage use case is a "gate". For example, an account runs a background check before any other paperwork and doesn't want the employee filling out tax and direct-deposit forms until that background check comes back clean. By placing the background check in Stage 1 and everything else in a later stage, the workflow holds the later forms until Stage 1 is done.
- Another common gate is policy acknowledgment. If an account needs employees to read a handbook or policy before they sign off on it, sequencing alone can't hold them to that order, an employee could open the acknowledgment form and sign it before opening the policy. Put the policy form in an earlier stage than its acknowledgment, and the acknowledgment stays "Locked" until the policy is complete.

Building Stages

Begin by navigating to the Onboarding Portal > Configuration > Forms > Form Sequence:

TWDemo

Dashboard

Analytics

Records

- Employees
- Placements
- Tasks
- Employers
- Clients
- Jobs

Integrations

- Marketplace
- TempWorks

Configuration

- Policies
- Forms**
- Automations
- Data Mapping

Forms

Form Sequence

New Form

My Forms

State

- Tags
- Type
- Waiting for
- AI build
- Uploaded by
- Batch

Reset

View

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
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Connecticut State Withholding (CT-W4)	Deployed					2024/4/9 16:29
Arizona State Withholding Election (A-4)	Deployed					2024/3/13 22:20

Within the "Form Sequence" window, select "New Stage" at the top right:

Form Sequence

Forms are grouped by stages. During onboarding, tasks are locked until all tasks from prior stages are completed. Form position in a stage also determines the default form sequence during onboarding.

Stage 1 (9 forms)

One Page Application- JDK

TempWorks Resume Collection Form Global

Background Check Disclosure and Authorization

TempWorks WebCenter User Account Setup Form Global

Federal Withholding [W-4] Global

Direct Deposit Form Global

Experian WOTC Global

I-9 Reverification Global

Employment Eligibility Verification [Standard I-9] Global

Unordered Forms

These forms don't belong to any stage and will be displayed at the end of onboarding. Drag them to the left to add to a stage.

Advance Notice Required When Employers Decide to Cease Providing a Health Care Benefit Plan Global

Alabama State Withholding [A4] Global

Alaska Labor Law Posters Global

Application Completion and Final Acknowledgment

Arizona Labor Law Posters Global

Arizona State Withholding Election [A-4] Global

Arkansas Labor Law Posters Global

Arkansas State Withholding [AR4EC] Global

Background check authorization form template

Enter a name for the Stage and select "Create Stage":

Create New Stage

Complete Application

Cancel

Create Stage

You will see the new stage appear as an empty group:

Stage 1 (9 forms)

One Page Application- JDK

TempWorks Resume Collection Form Global

Background Check Disclosure and Authorization

TempWorks WebCenter User Account Setup Form Global

Federal Withholding [W-4] Global

Direct Deposit Form Global

Experian WOTC Global

I-9 Reverification Global

Employment Eligibility Verification [Standard I-9] Global

Complete Application (0 forms)

No forms in this stage. Drag forms from the right to add them.

Unordered Forms

These forms don't belong to any stage and will be displayed at the end of onboarding. Drag them to the left to add to a stage.

Advance Notice Required When Employers Decide to Cease Providing a Health Care Benefit Plan Global

Alabama State Withholding [A4] Global

Alaska Labor Law Posters Global

Application Completion and Final Acknowledgment

Arizona Labor Law Posters Global

Arizona State Withholding Election [A-4] Global

Arkansas Labor Law Posters Global

Arkansas State Withholding [AR4EC] Global

Background check authorization form template

Continue to add the rest of your stages in the order you want them to run, top to bottom.

Once complete, move each form into the stage where it belongs. Any form you don't place stays in the Unordered Forms list:

Form Sequence

Forms are grouped by stages. During onboarding, tasks are locked until all tasks from prior stages are completed. Form position in a stage also determines the default form sequence during onboarding.

Complete Application (9 forms)

One Page Application- JDK

TempWorks Resume Collection Form Global

Background Check Disclosure and Authorization

TempWorks WebCenter User Account Setup Form Global

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Experian WOTC Global

Employment Eligibility Verification [Standard I-9] Global

I-9 Reverification Global

Unordered Forms

These forms don't belong to any stage and will be displayed at the end of onboarding. Drag them to the left to add to a stage.

Advance Notice Required When Employers Decide to Cease Providing a Health Care Benefit Plan Global

Alabama State Withholding [A4] Global

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Arkansas Labor Law Posters Global

Arkansas State Withholding [AR4EC] Global

Background check authorization form template

Note The "Select Multiple" option can be used to move more than one form at a time to a Stage:

Forms

Select Multiple
New Stage

Form Sequence

Forms are grouped by stages. During onboarding, tasks are locked until all tasks from prior stages are completed. Form position in a stage also determines the default form sequence during onboarding.

Complete Application (9 forms)

- One Page Application- JDK
- TempWorks Resume Collection Form Global

Unordered Forms

These forms don't belong to any stage and will be displayed at the end of onboarding. Drag them to the left to add to a stage.

- Advance Notice Required When Employers Decide to Cease Providing a Health Care Benefit Plan Global

Within a stage, drag the forms into the order the employee should see them. This is the sequencing part as it sets the order inside that stage:

Complete Application (9 forms)

- One Page Application- JDK
- TempWorks Resume Collection Form Global
- Background Check Disclosure and Authorization
- TempWorks WebCenter User Account Setup Form Global
- Federal Withholding [W-4] Global
- Direct Deposit Form Global
- Experian WOTC Global
- Employment Eligibility Verification [Standard I-9] Global
- I-9 Reverification Global

Note Please keep in mind the following relating to form sequencing and stages:

- Stages are **global**, meaning the forms will be sequenced/gated as they are within the stage(s) regardless if a policy has a different sequence of any of those same forms.
- Forms left in the Unordered Forms list are not gated as they fall outside the stage order. Forms within this list will be sequenced based on how they are listed within the policy they are added to.
- If a form isn't behaving like part of the gate, confirm it is added to a stage and not sitting in the unordered list.

What Employees See

The employee works through the current stage first, based on the forms included within the policy.

Forms in later stages show a "Locked" badge and can't be opened until every form in the earlier stage is complete.

Once the stage clears, the next stage unlocks on its own.

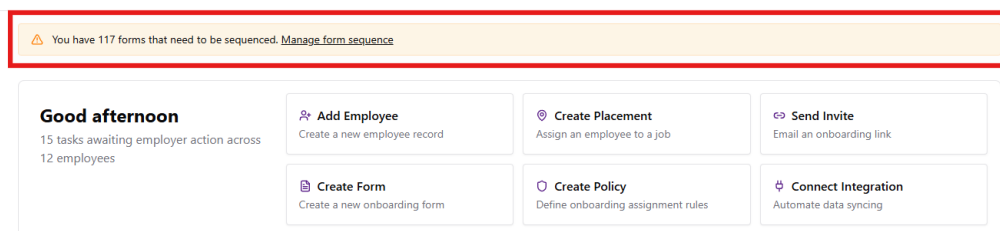
Within a stage, forms are ordered the way you sequenced them, but the employee can still move between them freely using the top navigational bar. The lock only applies across stages, not within an individual stage.

Note For more information on employees completing Onboarding Actions, please see the article titled [Onboarding - The Applicant Process](#).

Clearing the "Needs to be Sequenced" Banner

When forms in your account are not part of a sequence, the Onboarding Dashboard shows a banner that states "You have # of forms that need to be sequenced" with a "Manage form sequence" button that opens the "Form Sequence" window:

Dashboard



The screenshot shows the Onboarding Dashboard interface. At the top, a yellow banner with a red border contains a warning icon and the text: "You have 117 forms that need to be sequenced. [Manage form sequence](#)". Below the banner is a grid of six action buttons arranged in two rows of three. The first row includes "Add Employee" (Create a new employee record), "Create Placement" (Assign an employee to a job), and "Send Invite" (Email an onboarding link). The second row includes "Create Form" (Create a new onboarding form), "Create Policy" (Define onboarding assignment rules), and "Connect Integration" (Automate data syncing). To the left of the grid, a sidebar displays a greeting "Good afternoon" and a status "15 tasks awaiting employer action across 12 employees".

To clear it, move each flagged form into a stage, or into the sequencing order within a stage.

Related Articles