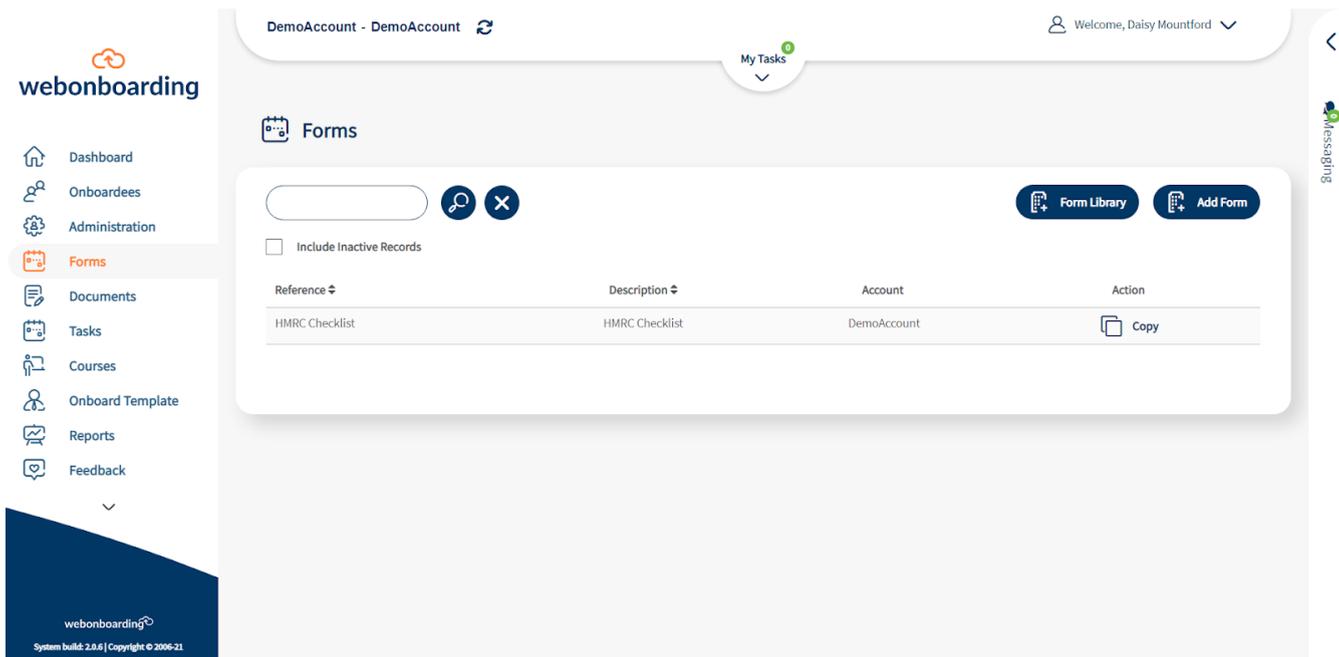


Forms.

Forms are questions built into the system, these can be created by HR admins and can contain a number of different types of questions.

Creating a form.

From the Dashboard or Left-hand side menu, navigate to forms.



Click, “add form” on the right hand side.



In the General tab, enter a short Reference and Description.

You can also add instructions for the onboardee here.

 Forms > HMRC Checklist

[Back](#) [+ Add](#) [Edit](#) [Copy Form](#)

General Companies

Name

Reference * HMRC Checklist

Description * HMRC Checklist

Instructions As a new employee your employer needs the information on this form before your first payday to tell HMRC about you and help them use the correct tax code. Fill in this form so that your employer can use it.

You can then start to build the questions within your form.

Every form should have at minimum one section and one field, so to start you must click “add new section” at the bottom right hand side.



Once you have clicked add new section you will be able to see more options to start to fill out the section details.

Section ~ Employee's personal details Saved ↑ ↓ ⌵

Section Label *

Section Key *

Description

Repeatable

Active

Fields Add New Field

You can then add a fields (questions) to the section you have created.

Field ~ Last name Text Mandatory Saved ↑ ↓ ⌵

Question Number

Label *

Field Key *

Description

Type *

Merge Field [Show Merge Fields](#)

Mandatory

Active

Admin Training

Forms

There are a 7 types of questions you can add to a form.

Text – A free text box allowing numbers, letters and symbols.

Numeric – A free text box only allowing numbers.

Date – Displays in a calendar format.

Radio button – Will allow you to create a multiple choice list.

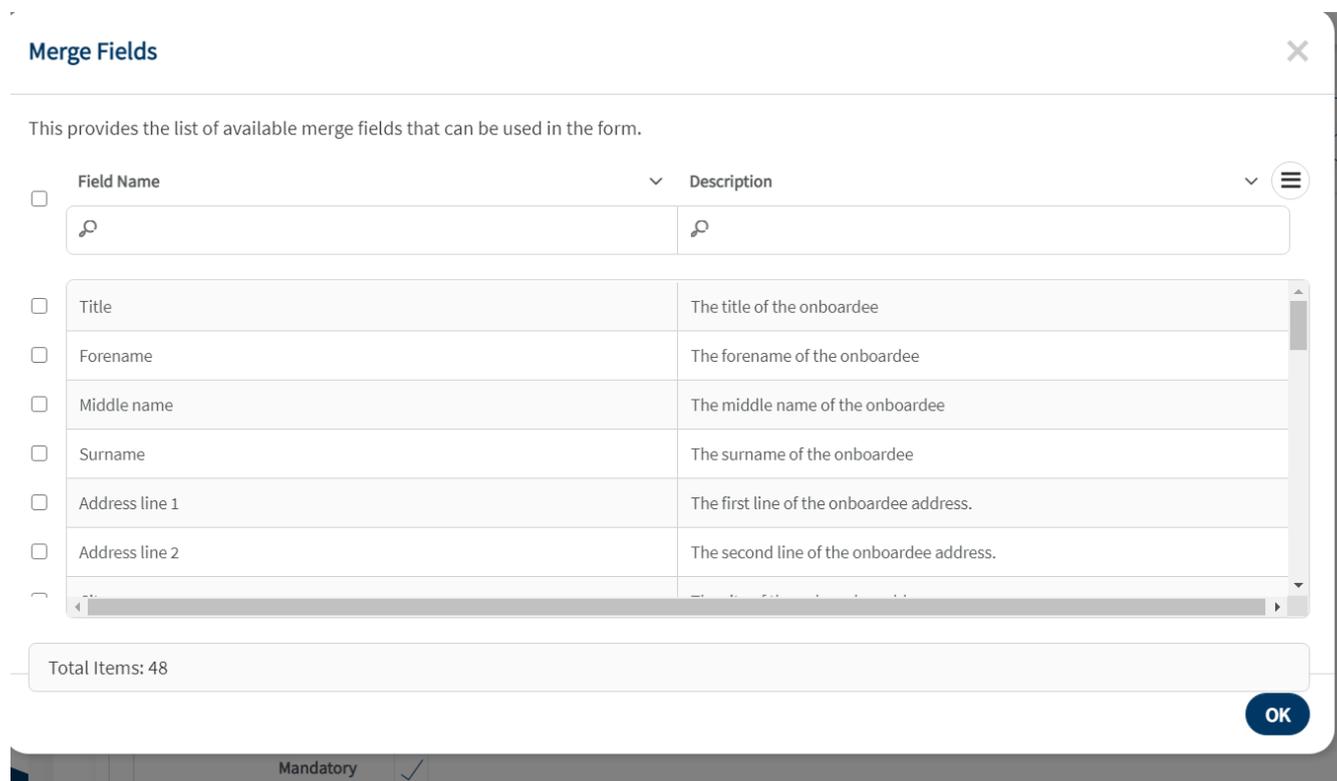
Drop down – Will allow you to create your own dropdown menu.

Text area – A larger free text box.

Boolean – Multiple choice list where more than 1 answer can be selected.

We have also added the option to add merge fields this would eliminate the pain point of an onboarder having to repeat information the system has already collected, for example first name and surname.

When you tick the merge field box the below will display.



The screenshot shows a dialog box titled "Merge Fields" with a close button (X) in the top right corner. Below the title, it says "This provides the list of available merge fields that can be used in the form." There is a search bar with a magnifying glass icon. Below that is a table with two columns: "Field Name" and "Description". Each row has a checkbox on the left. The table lists the following fields:

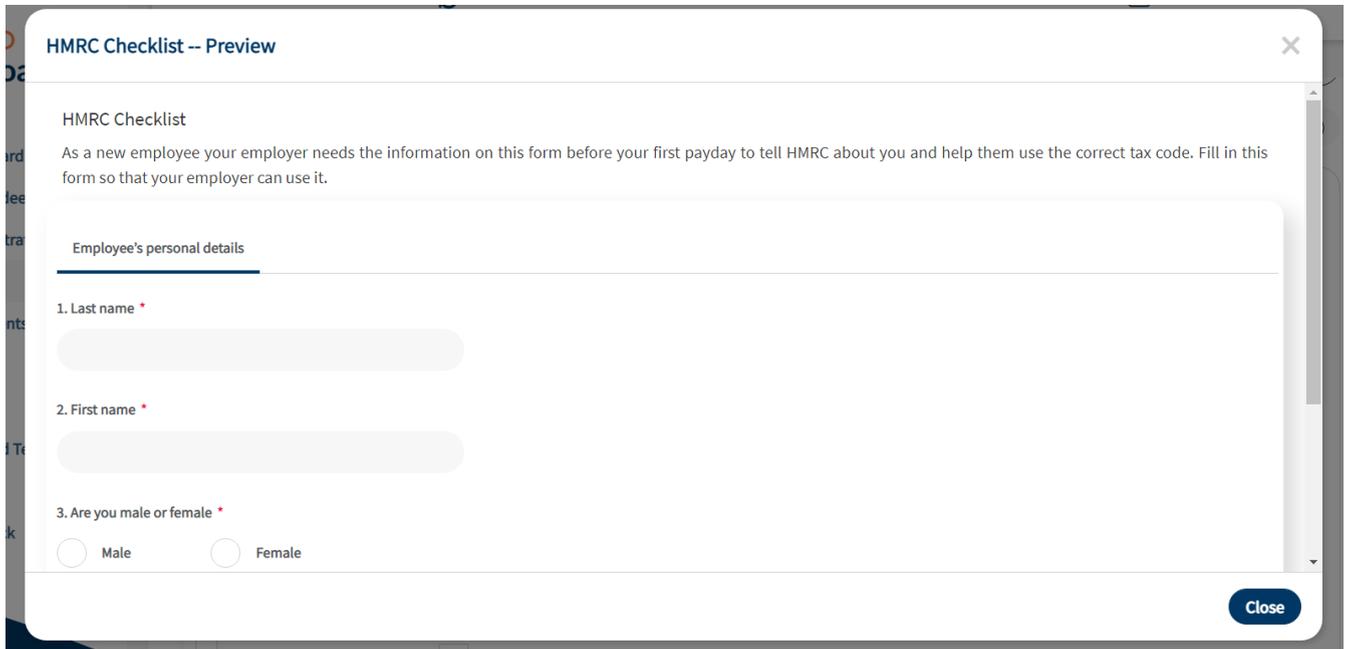
Field Name	Description
<input type="checkbox"/> Title	The title of the onboarder
<input type="checkbox"/> Forename	The forename of the onboarder
<input type="checkbox"/> Middle name	The middle name of the onboarder
<input type="checkbox"/> Surname	The surname of the onboarder
<input type="checkbox"/> Address line 1	The first line of the onboarder address.
<input type="checkbox"/> Address line 2	The second line of the onboarder address.

At the bottom of the dialog, there is a status bar that says "Total Items: 48" and an "OK" button.

When creating a form you can preview at any time using the preview button on the right hand side.



When you click this you will be able to see the sections and fields underneath as an onboarder would.

A screenshot of a web browser window titled 'HMRC Checklist -- Preview'. The window contains a form with the following elements:

- HMRC Checklist** (Section Header)
- Introductory text: "As a new employee your employer needs the information on this form before your first payday to tell HMRC about you and help them use the correct tax code. Fill in this form so that your employer can use it."
- Employee's personal details** (Section Header)
- 1. Last name * (Text input field)
- 2. First name * (Text input field)
- 3. Are you male or female * (Radio button selection for Male and Female)
- Close** button (Bottom right corner)

Once you have created your form you will need to select the companies related to this form, as you would with documents.

Please note, once a form has been started by an onboarder the form cannot be edited.