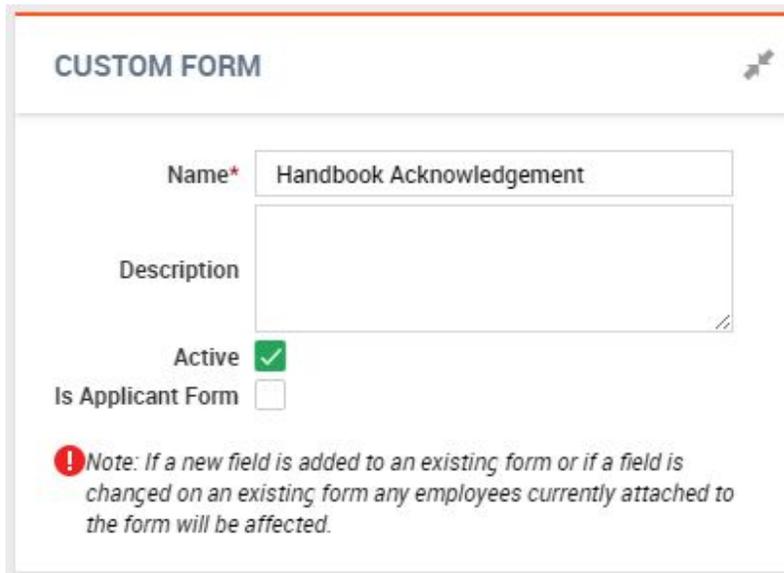


Custom Forms

- Custom Forms allow you to create a form that can be completed by the employee and submitted to their employee file.
- Go to **Company Settings > HR Setup > Custom Forms**
 - Click **ADD NEW** to create a new form
 - Give the form a name and description, then click **SAVE**



CUSTOM FORM

Name* Handbook Acknowledgement

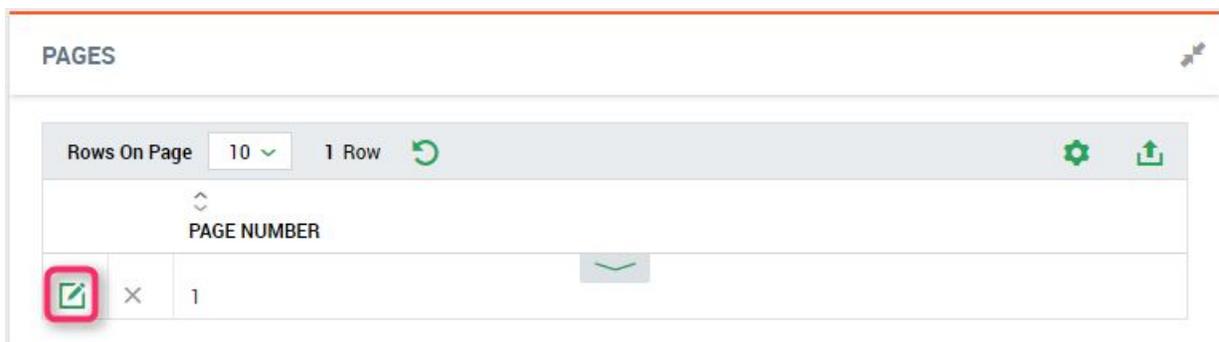
Description

Active

Is Applicant Form

! Note: If a new field is added to an existing form or if a field is changed on an existing form any employees currently attached to the form will be affected.

- Select the **ADD NEW PAGE** button to create pages for the newly saved form.
- Select the  icon to edit the page.



PAGES

Rows On Page 10 1 Row

PAGE NUMBER

	×	1
---	---	---

- There are two ways to edit a custom forms page
 - Adding a background image: Use this method if you already have a form created, and just need it to be filled in by an employee.
 - Fillable fields on the form will require more space than you might suspect. Be sure to space out the fields on your document to allow plenty of room to include a fillable field in the system.
 - Save each page of your form as a separate PDF document
 - Select **CHOOSE FILE** to upload each page as a background image.

FORM PAGE

Page Number

Page Format 8.5" x 11"

Change Background Image



Employee Handbook Acknowledgement

I, _____, acknowledge that I have received the Payroll Link employee handbook. I have read the handbook and agree to follow the guidelines and policies set forth.

Employee Signature

Date

- Your form is now ready to add fillable fields into the pre-created spaces
- Select
- A new field will appear at the top left of your form. Double click on the field, or select the  icon to edit the field

New Field 1



- Move the field into the space that needs to be filled in



Employee Handbook Acknowledgement

I, New Field 1, acknowledge that I have received the Payroll Link employee handbook. I have read the handbook and agree to follow the guidelines and policies set forth.

Employee Signature

Date

■ Update the Field Settings

The screenshot shows a 'FIELD SETTINGS' form with the following fields and values:

- a** Enabled:
- b** Read Only:
- c** Is Required:
- d** Name*: Employee Name
- e** Description: (Empty text area)
- f** Type: Characters
- g** Default Value: (Empty text box)
- h** Maximum Length: 0 (Maximum 255)
- i** Label: (Empty text box) (Maximum 255)
- j** Label Width: 100
- k** Label Height: 20
- Position: x: 91, y: 195
- Width: 150, Height: 30

- **a. Enabled:** Check this box to enable the field on your custom form
- **b. Read Only:** Check this box to make the field read only, so that it cannot be edited
- **c. Is Required:** Check this box to make the field required
- **d. Name:** Enter a name for the field
- **e. Description:** Optional description of the field. This will not show up on the form
- **f. Type:** Select from the drop down list of options
 - Radio Button: Used to add a dropdown list of options for the employee to choose from
 - If this type is selected, you will need to populate the list items
 - Select the “Is List” checkbox

The screenshot shows a 'LIST ITEMS' form with the 'Is List' checkbox highlighted by a red box.

- Add options one by one by selecting the **ADD** button or select **ADD MULTIPLE ITEMS** to enter several options at once. (If adding multiple items, put each item on a new line.)
- Employee: Used to pull employee information from the employee’s profile
 - If this type is selected, an additional setting option will appear that will allow you to choose the information you want to bring in.

The screenshot shows the following settings:

- Type: Employee
- Field: Full Name

- Sign: Will bring in an electronic signature field.
 - If this type is selected, an additional setting option will appear that will allow you to choose who should sign in this field.
 - g. **Default Value:** Optional value that will be pre-filled on the form
 - h. **Maximum Length:** Maximum number of characters allowed in the response
 - i. **Label:** This field will only be used when creating forms from scratch.
 - j. **Label Width/Height:** This field will only be used when creating forms from scratch
 - k. **Position:** Gives the position of the field on the page. This can be used to align fields vertically or horizontally, or to make minor adjustments to the field's placement.
 - l. **Width/Height:** Allows you to change the width and height of the fillable field. This can be extended to allow for longer responses, or reduced to allow the field to fit in a smaller space.
- Create a new fillable field for each field on your form.
 - Once the form is complete, select the *Preview* button to review it.



- Ensure that the fillable fields are not blocking any of the background text, and that all fields that are required are marked with an asterisk (*).

Preview

payroll link
Service. Performance. Integrity.

Employee Handbook Acknowledgement

I, , acknowledge that I have received the Payroll Link employee handbook. I have read the handbook and agree to follow the guidelines and policies set forth.

* Employee Signature

* Date

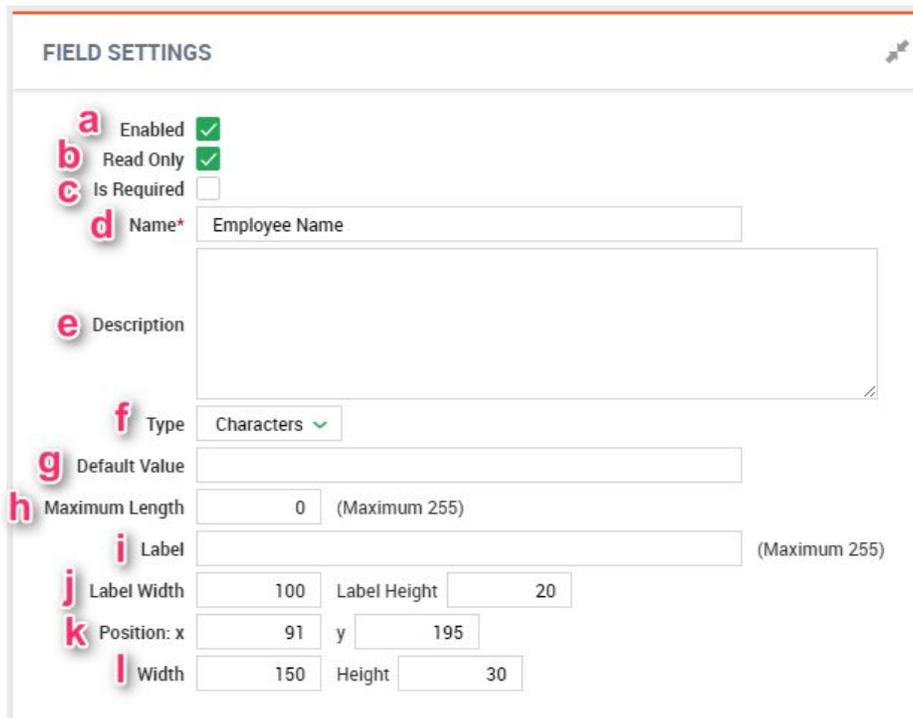
- Save the form

- Creating a form from scratch: Use this method if you need to create an entirely new form. Forms created this way will be very simplistic, and you may find that you prefer the look of forms with background images. If that is the case, it is recommended that you create the form using a word processing software and use the background image method instead.

- Select 
- A new field will appear at the top left of your form. Double click on the field, or select the  icon to edit the field



- Update the field settings



- a. **Enabled**: Check this box to enable the field on your custom form
- b. **Read Only**: Check this box to make the field read only, so that it cannot be edited
- c. **Is Required**: Check this box to make the field required
- d. **Name**: Enter a name for the field
- e. **Description**: Optional description of the field. This will not show up on the form
- f. **Type**: Select from the drop down list of options
 - Radio Button: Used to add a dropdown list of options for the employee to choose from
 - If this type is selected, you will need to populate the list items
 - Select the “Is List” checkbox



- Add options one by one by selecting the  button or select  to enter several options at once. (If adding multiple items, put each item on a new line.)
- Employee: Used to pull employee information from the employee's profile
 - If this type is selected, an additional setting option will appear that will allow you to choose the information you want to bring in.

Type 

Field 

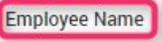
- Sign: Will bring in an electronic signature field.
 - If this type is selected, an additional setting option will appear that will allow you to choose who should sign in this field.
- g. **Default Value:** Optional value that will be pre-filled on the form
- h. **Maximum Length:** Maximum number of characters allowed in the response

Maximum Length (Maximum 255)

 Label (Maximum 255)

Label Width Label Height

Preview

 Employee Name

- i. **Label:** Enter the question or text that you want to appear before the fillable field
 - j. **Label Width/Height:** Allows you to change the width and height of the label.
 - k. **Position:** Gives the position of the field on the page. This can be used to align fields vertically or horizontally, or to make minor adjustments to the field's placement.
 - l. **Width/Height:** Allows you to change the width and height of the fillable field. This can be extended to allow for longer responses, or reduced to allow the field to fit in a smaller space.
- Create a new field and label for each fillable field needed on your form.
 - Once the form is complete, select the *Preview* button to review it.

Preview

Employee Name

I acknowledge that I have received the Payroll Link employee handbook. I have read the handbook and agree to follow the guidelines and policies set forth.* 

Date Signed 

- Save the form.

- Security Settings
 - New custom forms will not be available to attach to an HR Action or checklist, and will not be available under My Account > My Forms or My Employees > Forms until they have been added to the security profiles. At this time, you must contact Payroll Link to add a new form to your profile. Your Payroll Link representative will need the following information:
 - Which security profiles should have access to the form as an employee?
 - Which security profiles should have access to the forms completed by their employees?
 - Which security profiles should have access to attach the form to a checklist or HR Action?
 - If the form will be attached to an HR Action, which security profiles should be able to initiate that action?