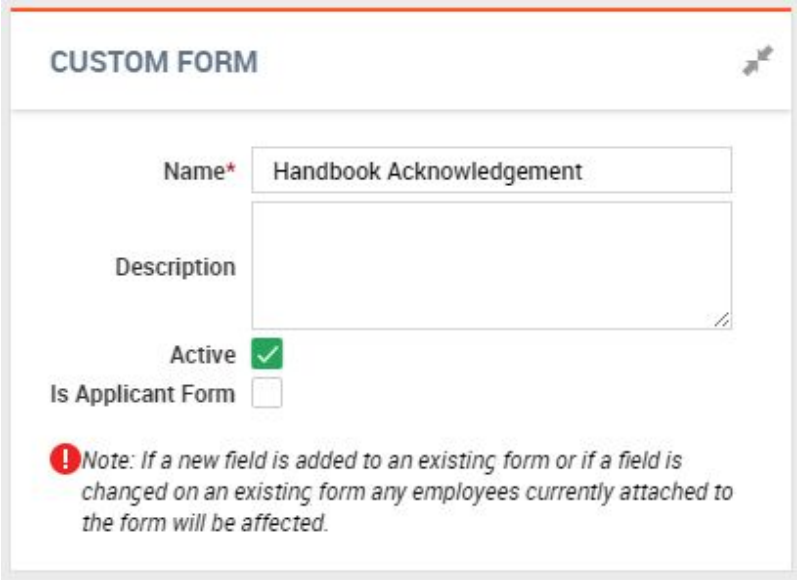
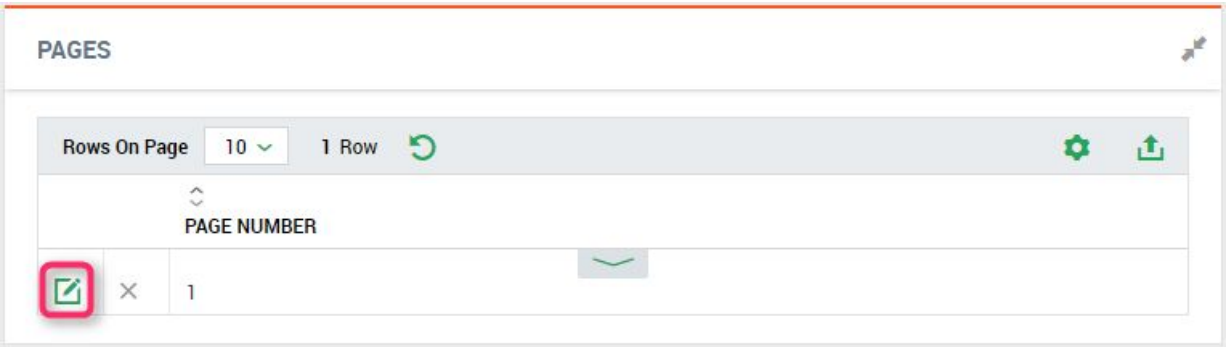
# Custom Forms

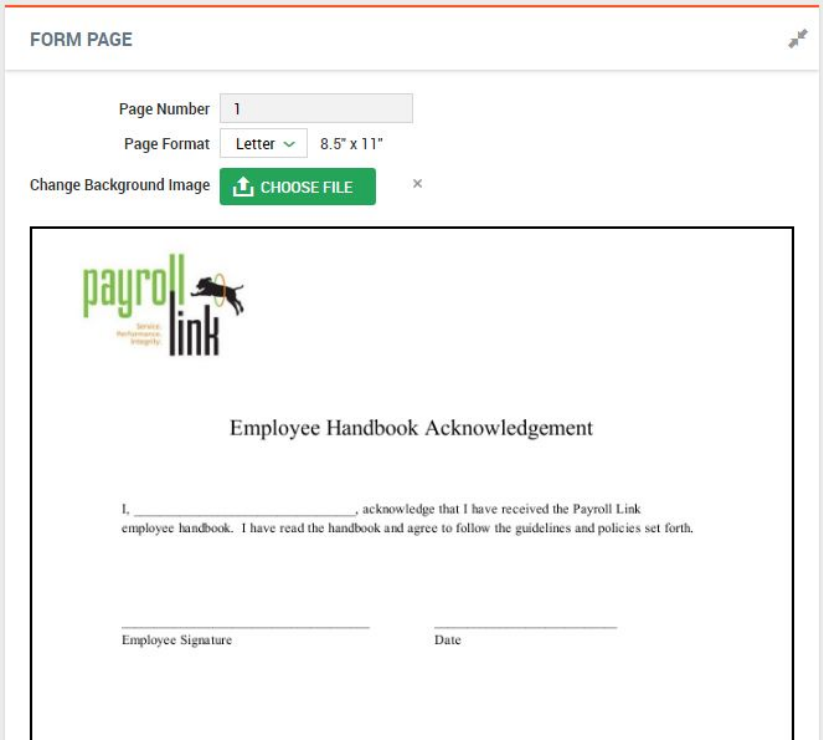
- Custom Forms allow you to create a form that can be completed by the employee and submitted to their employee file.
- Go to **Company Settings > HR Setup > Custom Forms**
    - Click ADD NEW to create a new form
    - Give the form a name and description, then click SAVE




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

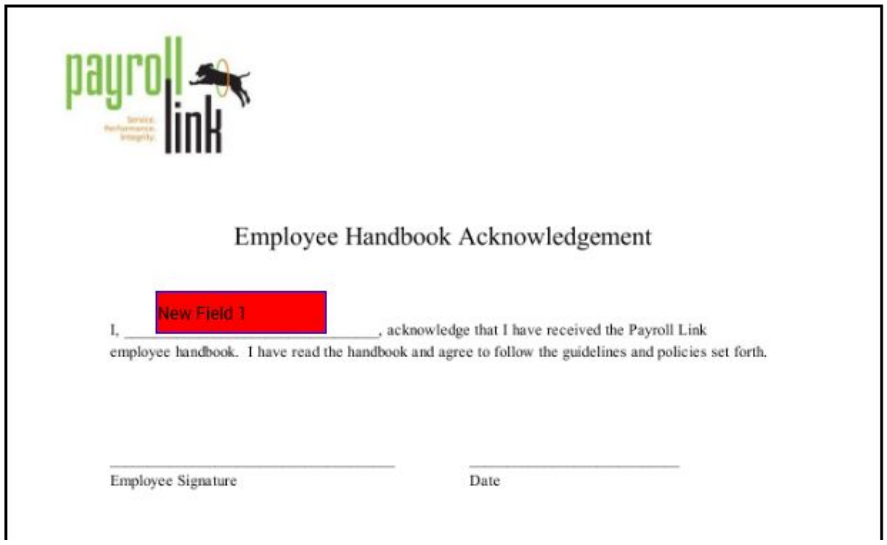



- There are two ways to edit a custom forms page
    - Adding a background image: Use this method if you already have a form created, and just need it to be filled in by an employee.
        - Fillable fields on the form will require more space than you might suspect. Be sure to space out the fields 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.

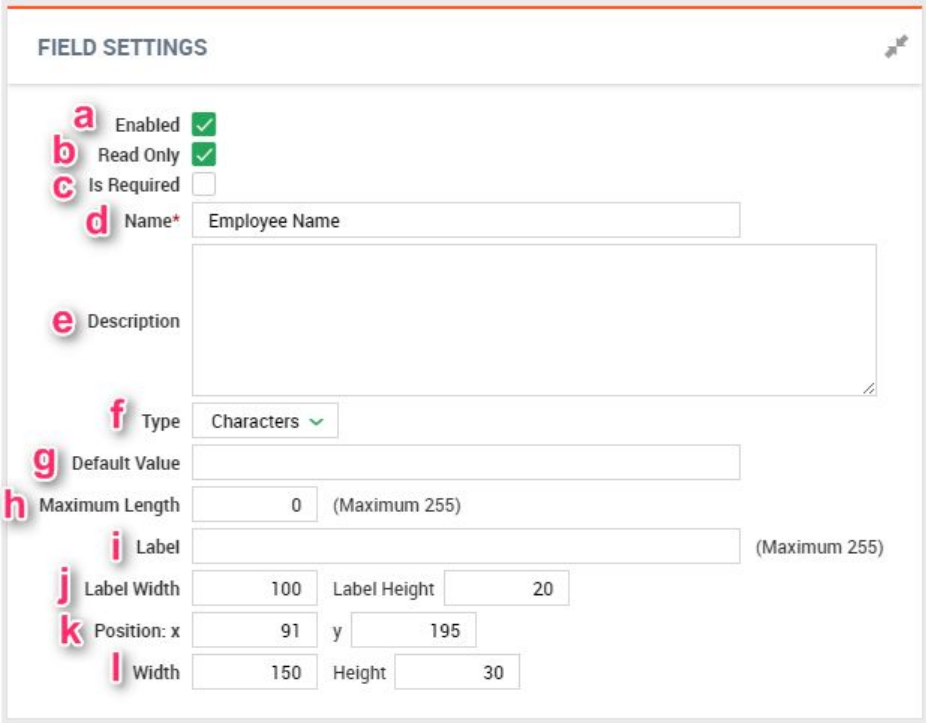



- Your form is now ready to add fillable fields into the pre-created spaces
- Select ADD NEW FIELD
- A new field will appear at the top left of your form. Double click on the field, or select the icon to edit the field

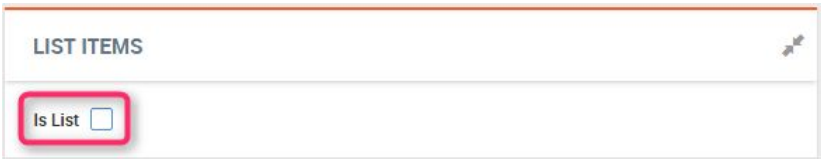

- Move the field into the space that needs to be filled in



- Update the Field Settings



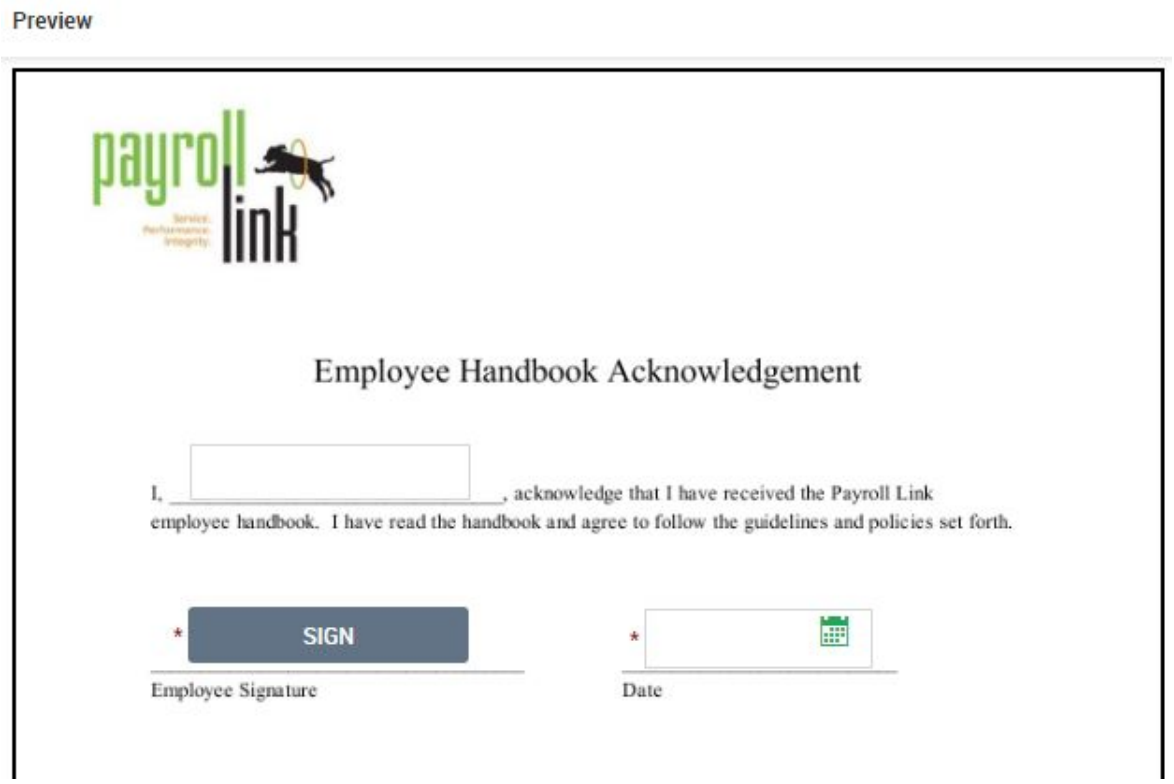

- a. **Enabled**: Check this box to enable the field on your custom form
- b. **Read Only**: Check this box to make the field read only, so that it cannot be edited
- c. **Is Required**: Check this box to make the field required
- d. **Name**: Enter a name for the field
- e. **Description**: Optional 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 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.

        - 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 (*).

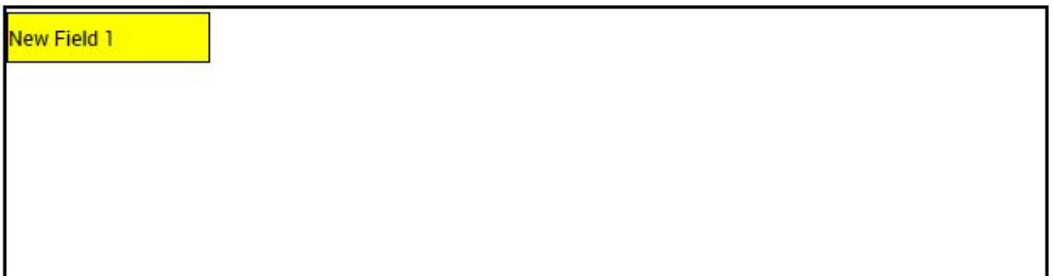



- Save the form

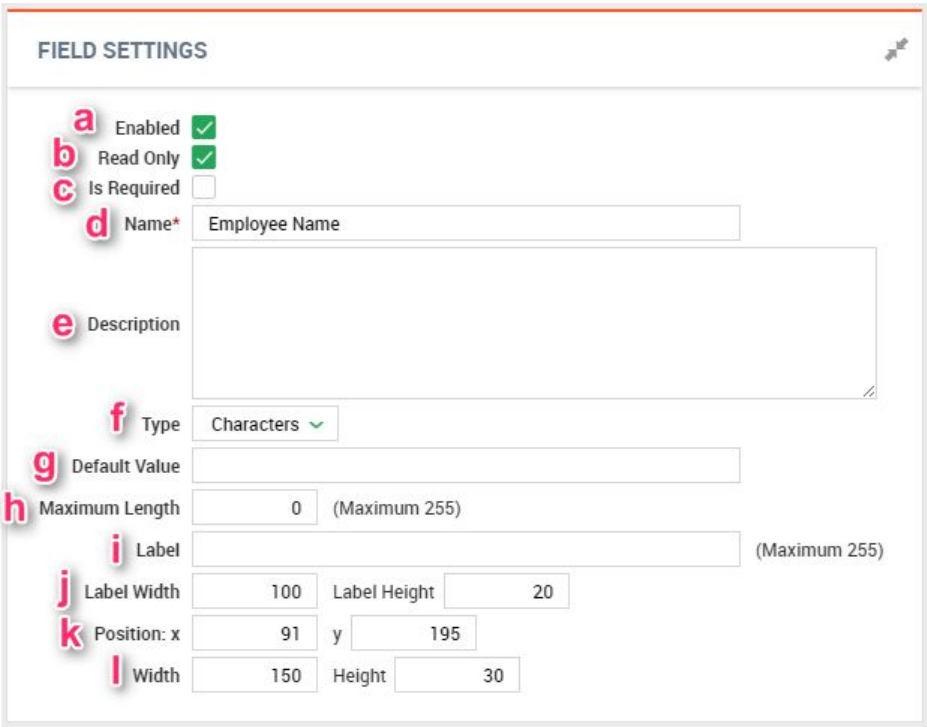
- Creating a form from scratch: Use this method if you need to create an entirely new form. Forms created this way will be very simplistic, and you may find that you prefer the look of forms with background images. If that is the case, it is recommended that you create the form using a word processing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

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- 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
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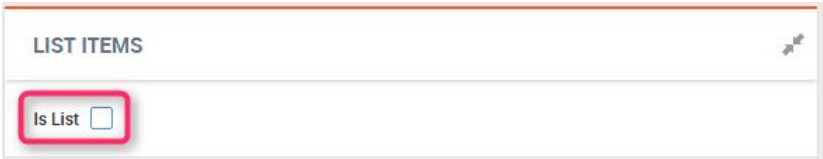

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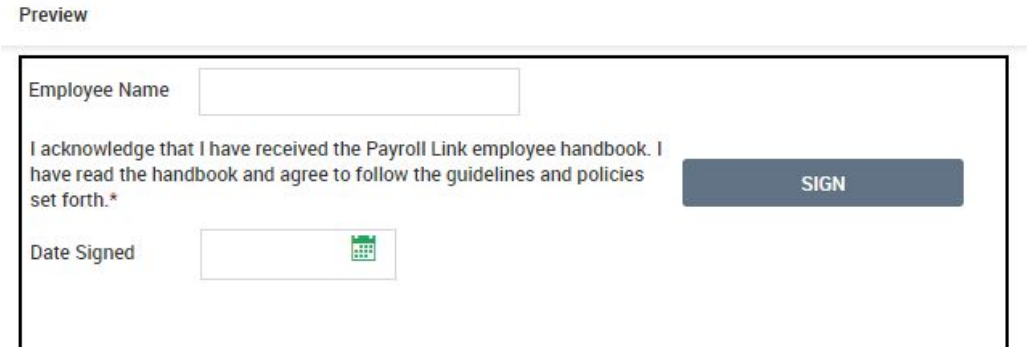
- Employee: Used to pull employee information from the employee's profile
  - If this type is selected, an additional setting option will appear that will allow you to choose the information you want to bring in.


- 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**: 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.


- 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?