



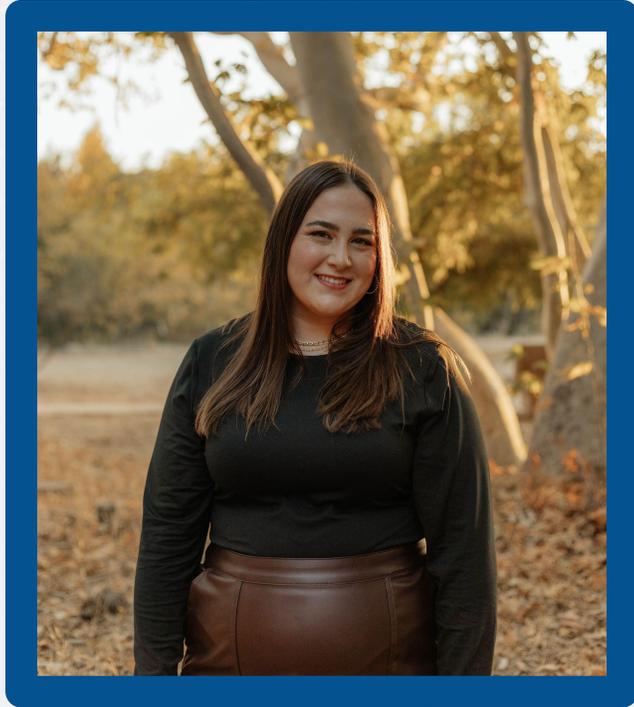
TEAM Software
by WORKWAVE®

Building a Seamless Onboarding Experience with Hire by WorkWave

Tuesday, February 3, 2026

1:15PM – 2PM

Meet your Presenters



Jordan Craig

Implementation Specialist, TEAM Software



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Sr. Implementation Specialist, TEAM Software

Agenda

- ★ Review existing Forms
- ★ Edit and Replace Forms
- ★ Map forms to complete fields of information within your packet
- ★ Upload New Forms
- ★ Discover ways to designate which forms go to which New Hires.
- ★ Company Profile Review & Updates

Forms Maintained by EHX

- ★ Employee I9
- ★ Federal Tax Withholding Forms (W4/W9)
- ★ State Tax Withholding Forms
- ★ Work Opportunity Tax Credit (WOTC) forms
- ★ Voluntary Self-Identification of Disability Form (Form CC-305)
- ★ Generic Medical Questionnaires
- ★ Certain State-Specific Required Forms
 - CA Wage Theft Notice
 - CA Predesignation of Personal Physician
 - CA Disability Insurance Provisions Form
 - CA Family Leave Form
 - CA Program for Unemployed Form
 - CA General/Sexual Harassment Form
 - D.C. Notice of Hire
 - MN Employee Notice
 - NJ Earned Sick Leave Form
 - NY Notice of Pay Rate and Payday
 - NY Security Application Form
 - OR State of Oregon Agreement Form

Custom Fields Master List

Onboarding Custom Questions (Page 5-6 of Master List)

- Questions asked in the Onboarding Interview for the New Hire to answer

Employee Profile Custom Questions (Page 6-7 of Master List)

- Questions asked in the Employee Profile for the hiring person to answer about the employee they are hiring.

Custom Form vs Policy Acknowledgement

Custom Forms appear at the end of the completed Onboarding Packet.

When to turn Custom Form **On:**

- Document has a signature or other information filled in – It's mapped.
 - Acknowledgement Forms
 - Contracts/Agreements
 - Authorization Forms (Direct Deposit or Background Checks)



Include as Custom Form *

Yes

[Sample Employee Handbook](#)

When to turn Custom Form **Off:**

- Document does not need to be included in the completed packet.
 - Entire employee handbook
 - FYI Forms to the Employee (no signature required)
 - State Mandated Forms (Anti-Harassment Forms)
- Disabling these types of documents as a custom form can help keep the final packet short/small file size.



Include as Custom Form *

No

Custom Form vs Policy Acknowledgement

Policy Acknowledgments appear in the Onboarding Interview for the Employee to Acknowledge.

Onboarding - Jordan Test Employee

- 1) Welcome!
- 2) Personal Info
- 3) Contact Information
- 4) Other Info
- 5) Emergency Contacts
- 6) Policies**

Policies

| | |
|--------------------|---------------------|
| Policy Name | Time Keeping Policy |
| Policy Description | Time Keeping Policy |

You must click the link to view the policy AND agree to its terms to continue this section. [View Policy](#)

Please review the attached policy. There is information that will be populated at the end of the onboarding process. By selecting "yes" you acknowledge that you have reviewed this policy and understand that it will be digitally signed. Please make sure to review this completed form that is presented at the final signing stage.

Do you agree to the terms of this policy? *(Required)*

Yes

No

[Back](#) [Continue Questions](#)

Custom Form vs Policy Acknowledgement

Policy Acknowledgments appear in the Onboarding Interview for the Employee to Acknowledge.

Ask yourself: Does the employee need to read and acknowledge this document during onboarding?

If yes: Enable it as a Policy Acknowledgement.

Include as a Policy Acknowledgement in Interview

What does this mean?

Yes

Custom Form vs Policy Acknowledgement

Policy Acknowledgments appear in the Onboarding Interview for the Employee to Acknowledge.

Rare Scenarios where Policy Acknowledgment is set to 'No':

- Documents filled out by the hiring personnel that should be included in the final packet (as a custom form) but not necessarily presented to the employee to acknowledge.
 - Ex: Employee Information Forms

Include as a Policy Acknowledgement in Interview

What does this mean?

No ▼

Custom Fields Master List



Session Feedback

- Login to the Event Mobile App
- Add this session to your schedule
- Click Survey
- Give it a rating 1-5 stars

Questions?