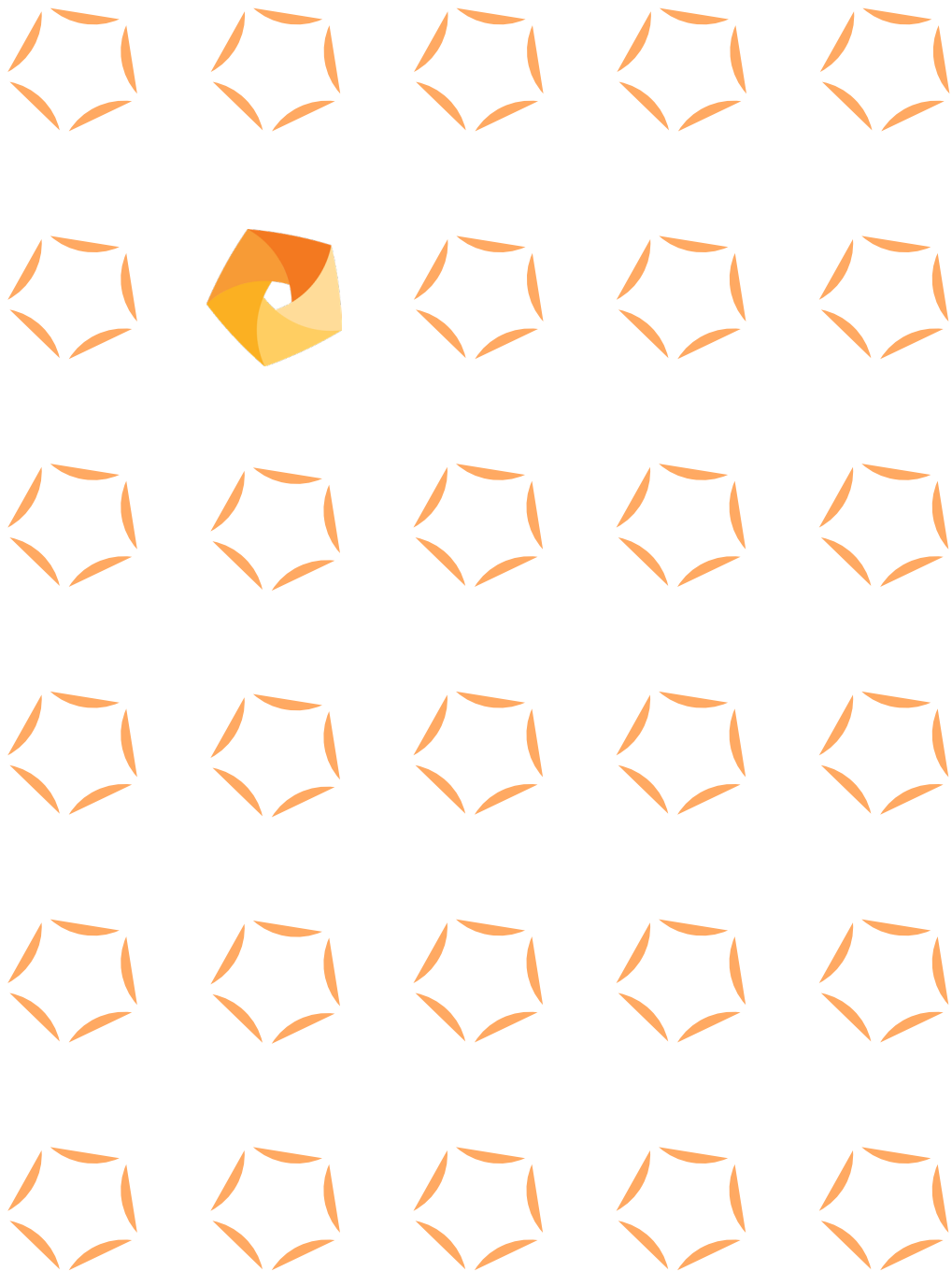


How to Create and Edit Onboarding Tasks

FOLLOW THESE STEPS TO SET UP NEW TASKS OR UPDATE EXISTING ONES FOR YOUR ONBOARDING WORKFLOW



Topics

This instructional presentation covers the two topics below. To skip ahead, click the button.



Learn more about available task options

How to create a new task

How to update an existing task



Available task options

Available task options



Custom Form: Build a custom web form from scratch using a variety of field types to collect information directly from a new hire.

Document Collection: Request that new hires upload one or more documents, such as a work permit, food handler's permit, or certification.

Document Signature: Upload a document for the new hire to review and electronically acknowledge with a signature only. No additional fields can be added.

Fillable PDF: Upload a PDF and add fillable fields within the document. Certain fields can be mapped to system data, allowing information to populate automatically where supported.

Video: Assign a video for the new hire to watch, with the option to require it for a specified period before completion. A signature acknowledgment can also be required after the video is watched.

Direct Deposit Form (All Options): Payroll distributions election form with options for Checking, Savings, Pay Card, and Paper Check.

Direct Deposit Form (Direct Deposit Only): Payroll distributions election form with options for Checking and Savings.

Direct Deposit Form (Paper Check): Payroll distributions election form with options for Checking, Savings, and Paper Check.

Direct Deposit Form (Pay Card): Payroll distributions election form with options for Checking, Savings, and Pay Card.

Available task options



TASK TYPE	DESCRIPTION
Custom Form	Build a custom web form from scratch using a variety of field types to collect information directly from a new hire.
Document Collection	Request that new hires upload one or more documents, such as a work permit, food handler's permit, or certification.
Document Signature	Upload a document for the new hire to review and electronically acknowledge with a signature only. No additional fields can be added.
Fillable PDF	Upload a PDF and add fillable fields within the document. Certain fields can be mapped to system data, allowing information to populate automatically where supported.
Video	Assign a video for the new hire to watch, with the option to require it for a specified period before completion. A signature acknowledgment can also be required after the video is watched.
Direct Deposit Form (All Options)	Payroll distributions election form with options for Checking, Savings, Pay Card, and Paper Check.
Direct Deposit Form (Direct Deposit Only)	Payroll distributions election form with options for Checking and Savings.
Direct Deposit Form (Paper Check)	Payroll distributions election form with options for Checking, Savings, and Paper Check.
Direct Deposit Form (Pay Card)	Payroll distributions election form with options for Checking, Savings, and Pay Card.



How to create a new task

How to create a new task



In the **Admin** section, open the Company Details by selecting the open icon next to your company name.

Admin

Companies Entities Locations Users Employees >

Search
Q Name

Show inactive companies Columns

Name	Owner Name	Payroll Processor	Location States	Industry	Date Added
APRIO DEMO CLIENT	APRIO CLIENT		KS, MI, MN, OR	Food Preparation and Serving Related Oc...	05/07/2026

Dense

Rows per page: 25 1-1 of 1 < >

Navigate to the **Onboarding** tab — the **Tasks** sub-tab is selected by default.

APRIO DEMO CLIENT Details

Company Info Entities & Locations Departments Company Users Employees Downloads Communications Docs & Media Onboarding Post Onboarding

Tasks Templates Automation Rules Introduction Message

+ Add new task

Search
Q Title

Show inactive tasks Columns

Title	Description	Task Type	Date Added	Last Modified	Created By	Updated By
Custom Form	Custom Form	Custom Form	05/07/2026	05/07/2026	cristy.singleton+adm...	cristy.singleton+adm...
Direct Deposit Form (All Options)	Direct Deposit Form (All Options)	Direct Deposit Form (All Options)	05/07/2026	05/15/2026	cristy.singleton+adm...	cristy.singleton+adm...
Minor Work Permit	Minor Work Permit	Document Collection	05/07/2026	05/07/2026	cristy.singleton+adm...	cristy.singleton+adm...

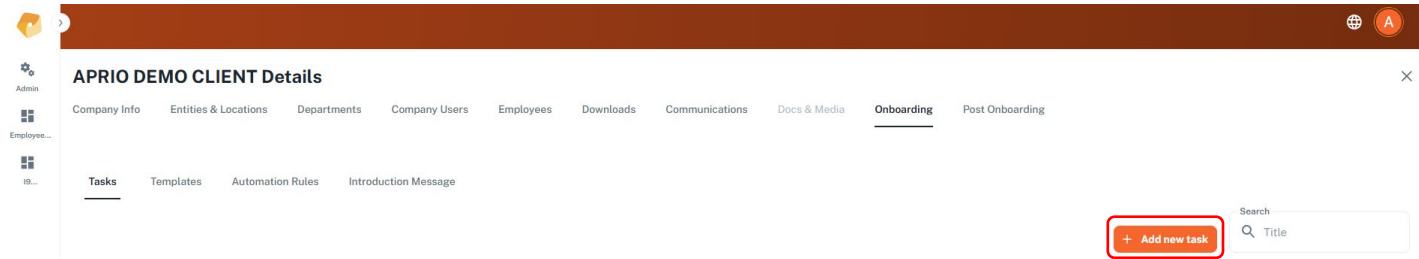
Dense

Rows per page: 25 1-3 of 3 < >

How to create a new task



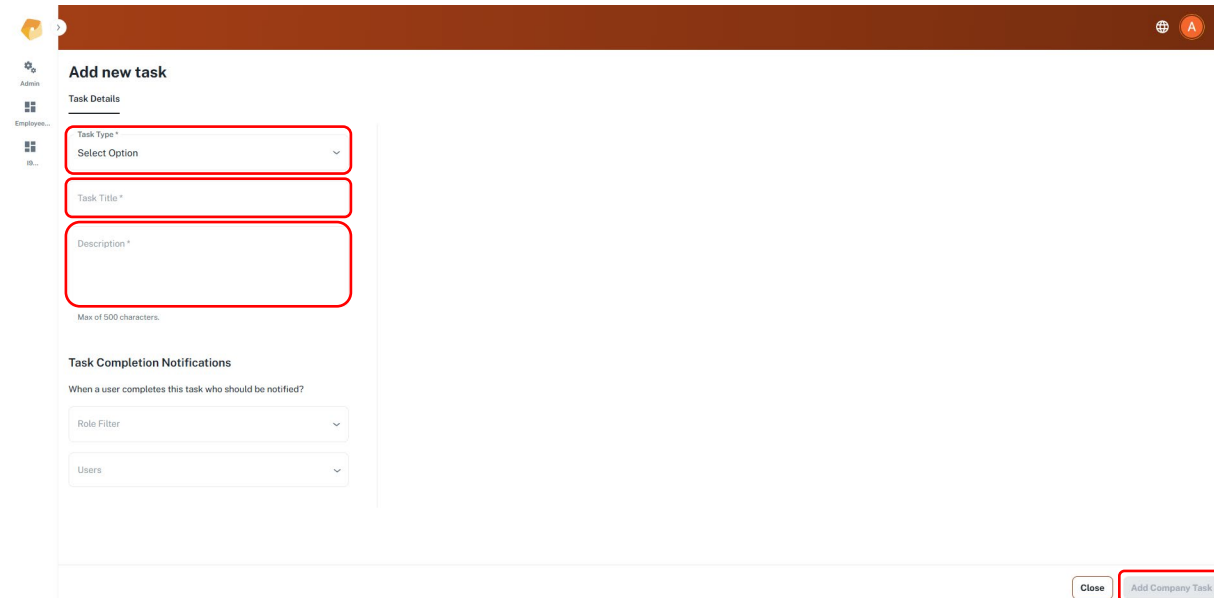
To add a new template, select the **+Add New Task** option.



Select the task type from the **Task Type** dropdown, then enter a **Task Title** and **Description**.

To notify a user in your organization each time a new hire completes this task, select the appropriate **Role Type** and **User** from the corresponding dropdown menus.

When all required information has been entered, click **Add Company Task** to save.



How to create a new task



Select the **Builder** tab and add any options or fields by choosing the **+ Add** button next to each item. Required fields are marked with an asterisk (*). In the example below, an English Label and English Description are required.

To remove a field, select the **Remove** button.

Open the **Preview** tab to review your task with the added fields.

Once your task is set up to your preferences, click **Save Changes** to create your new task.

The screenshot displays the Aprio Builder interface for creating a new task. The interface is divided into several sections:

- Header:** A dark blue bar at the top with a globe icon and a user profile icon labeled 'A'.
- Left Sidebar:** Contains navigation links for 'Admin', 'Employee...', and '19...'. Below these are icons for 'Task Details', 'Builder' (selected), and 'Preview'.
- Field Types:** A list of available field types categorized into 'Basic Input Fields' and 'Basic Selection Fields'.
 - Basic Input Fields:** Includes 'Short Answer' (single-line input), 'Long Answer' (multi-line input), and 'Number' (restricted to numerical values). Each has an '+ Add' button.
 - Basic Selection Fields:** Includes 'Select List' (dropdown menu), 'Radio Buttons' (set of options), and 'Checkbox' (set of options). Each has an '+ Add' button.
- Composite Fields:** A section at the bottom of the sidebar with a 'Name' field and an '+ Add' button.
- Custom Form Builder:** The main area where the task form is configured. It shows a 'Short Answer' field with two input boxes: 'Label - EN *' (required) and 'Label - ES'. Below these are 'Description - EN *' (required) and 'Description - ES'. A note indicates 'Will display below the field on the form.' Below the form fields is a 'FIELD OPTIONS' section with a 'Required' checkbox.
- Buttons:** At the bottom right, there are 'Close' and 'Save Changes' buttons.



How to edit an existing task

How to edit an existing task



In the **Admin** section, open the Company Details by selecting the open icon next to your company name.

The screenshot shows the Admin section of the Aprio CONNECT interface. The 'Admin' icon in the sidebar is highlighted with a red box. The 'Companies' tab is selected. The table lists companies, and the 'APRIO DEMO CLIENT' entry has an edit icon (pencil) highlighted with a red box.

Name	Owner Name	Payroll Processor	Location States	Industry	Date Added
APRIO DEMO CLIENT	APRIO CLIENT		KS, MI, MN, OR	Food Preparation and Serving Related Oc...	05/07/2026

Navigate to the **Onboarding** tab — the **Tasks** sub-tab is selected by default.

The screenshot shows the Onboarding tab of the Aprio CONNECT interface. The 'Onboarding' tab in the top navigation bar is highlighted with a red box. The 'Tasks' sub-tab in the left navigation bar is also highlighted with a red box.

Title	Description	Task Type	Date Added	Last Modified	Created By	Updated By
Custom Form	Custom Form	Custom Form	05/07/2026	05/07/2026	cristy.singleton+adm...	cristy.singleton+adm...
Direct Deposit Form (All Options)	Direct Deposit Form (All Options)	Direct Deposit Form (All Options)	05/07/2026	05/15/2026	cristy.singleton+adm...	cristy.singleton+adm...
Minor Work Permit	Minor Work Permit	Document Collection	05/07/2026	05/07/2026	cristy.singleton+adm...	cristy.singleton+adm...

How to edit an existing task



Select the task you would like to edit.

The screenshot shows the 'APRIO DEMO CLIENT Details' page with the 'Onboarding' tab selected. Under the 'Tasks' sub-tab, a list of tasks is displayed. The 'Custom Form' task is highlighted with a red box. The table below shows the details of the tasks.

Title	Description	Task Type	Date Added	Last Modified	Created By	Updated By
Custom Form	Custom Form	Custom Form	05/07/2026	05/07/2026	cristy.singleton+adm...	cristy.singleton+adm...
Direct Deposit Form (All Options)	Direct Deposit Form (All Options)	Direct Deposit Form (All Options)	05/07/2026	05/15/2026	cristy.singleton+adm...	cristy.singleton+adm...
Minor Work Permit	Minor Work Permit	Document Collection	05/07/2026	05/07/2026	cristy.singleton+adm...	cristy.singleton+adm...

Additional UI elements include a search bar, an 'Add new task' button, a 'Show inactive tasks' toggle, and a 'Columns' button. The bottom of the table shows 'Rows per page: 25' and '1-3 of 3'.

The **Task Details** will open by default. Make any necessary changes to this tab, if needed, then select the **Builder** tab.

The screenshot shows the 'Custom Form' page with the 'Builder' tab selected. The 'Task Details' tab is also visible. The 'Active' toggle is turned on. The 'Task Type' dropdown is set to 'Custom Form'. The description for 'Custom Form' is 'Build a custom web form to collect data from an employee.'

How to edit an existing task



Make any necessary updates, then open the **Preview** tab to review your changes. Once all updates are complete, select **Save Changes** to apply them.

The screenshot displays the Aprio Custom Form Builder interface. At the top, a dark brown header bar contains a navigation menu with icons for Admin, Employee..., and 19... On the left side, a sidebar lists the 'Custom Form' title and tabs for 'Task Details', 'Builder', and 'Preview'. The 'Preview' tab is currently selected and highlighted with a red border. Below the tabs, the 'Field Types' section is visible, categorized into 'Basic Input Fields' and 'Basic Selection Fields'. Under 'Basic Input Fields', there are three options: 'Short Answer' (single-line input), 'Long Answer' (multi-line input), and 'Number' (numerical values). Under 'Basic Selection Fields', there are three options: 'Select List' (single selection), 'Radio Buttons' (one selection at a time), and 'Checkbox' (multiple selections). Each field type has a corresponding icon and a description. To the right of the field types, a large preview area shows the 'Custom Form' layout. It contains three field types: 'Checkbox', 'Select List', and 'Signature'. Each field has a 'Remove' button and an 'Expand' button. Below the fields, a 'CUSTOM FORM TIPS' section provides guidance on being efficient and avoiding duplication. At the bottom right, there are two buttons: 'Close' and 'Save Changes', with 'Save Changes' highlighted by a red border.

Custom Form

Task Details **Builder** **Preview**

Field Types

Basic Input Fields

- Short Answer**
Single-line input for short text entries. **+ Add**
- Long Answer**
Multi-line input for longer text entries. **+ Add**
- Number**
Input field restricted to numerical values. **+ Add**

Basic Selection Fields

- Select List**
Dropdown menu allowing single selection from multiple options. **+ Add**
- Radio Buttons**
Set of options where only one can be selected at a time. **+ Add**
- Checkbox**
Set of options where multiple selections are allowed. **+ Add**

Composite Fields

- Name** **+ Add**

Custom Form

Custom Form

- Checkbox**
Set of options where multiple selections are allowed. **Remove** **Expand**
- Select List**
Dropdown menu allowing single selection from multiple options. **Remove** **Expand**
- Signature**
Field capturing a user's signature input. **Remove** **Expand**

CUSTOM FORM TIPS

Be Efficient
Add a field for each piece of information you need to gather first, then drag and drop to re-order. As a final step, add sections and page breaks where needed.

Avoid Duplication
Every submission will be attached to a record. Think of it as adding another page to a longer document. You don't need to collect basic details every time, like name and contact information, that information can be pulled in as needed for export/review.

Close **Save Changes**