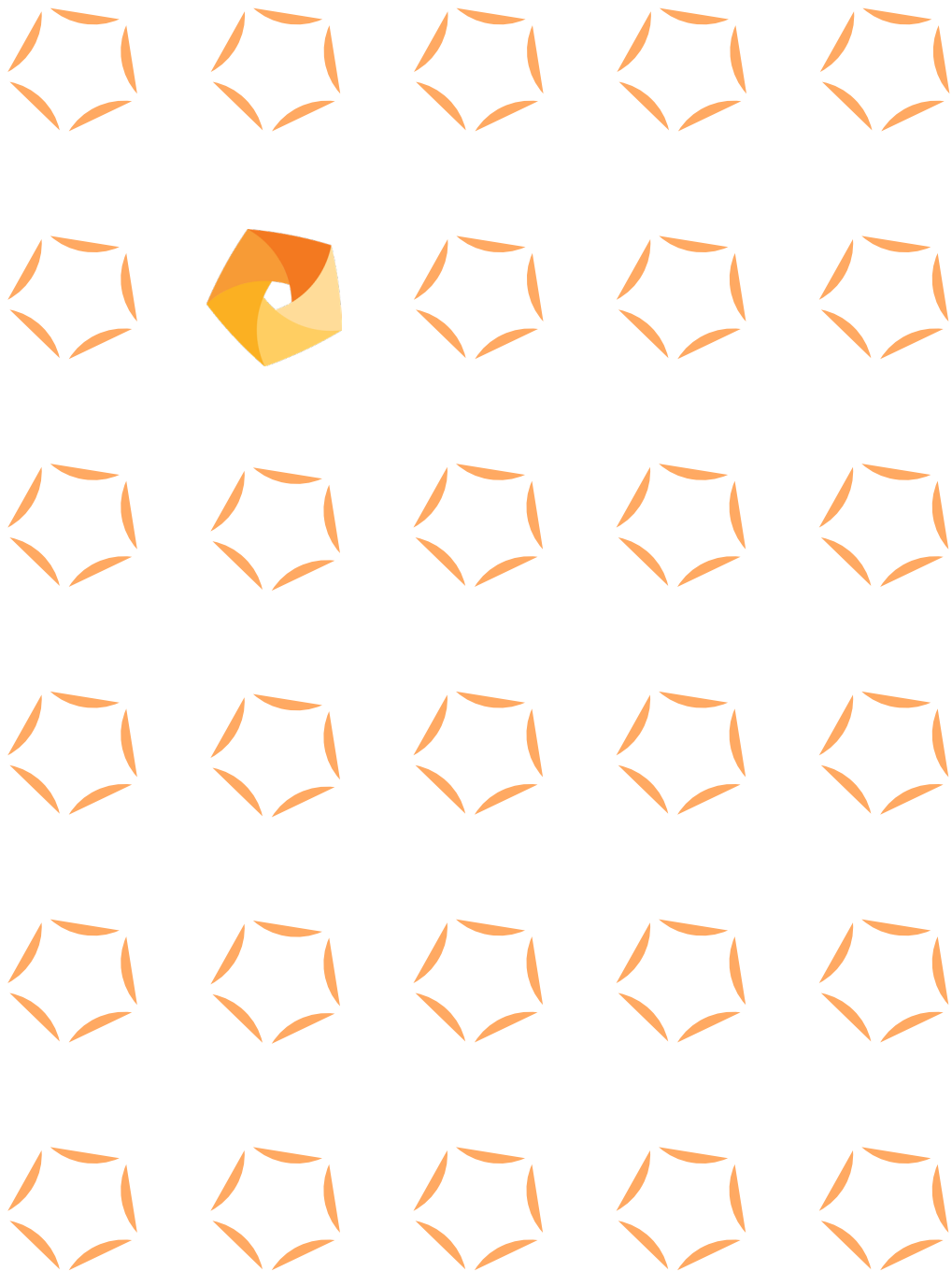


Creating and Editing Onboarding Templates

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



Topics

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

How to create a new template

How to update an existing template



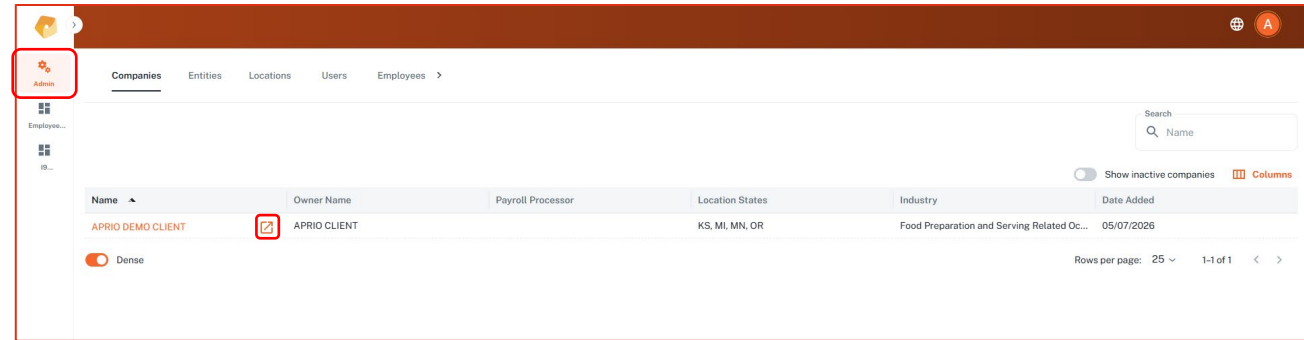


How to create a new template

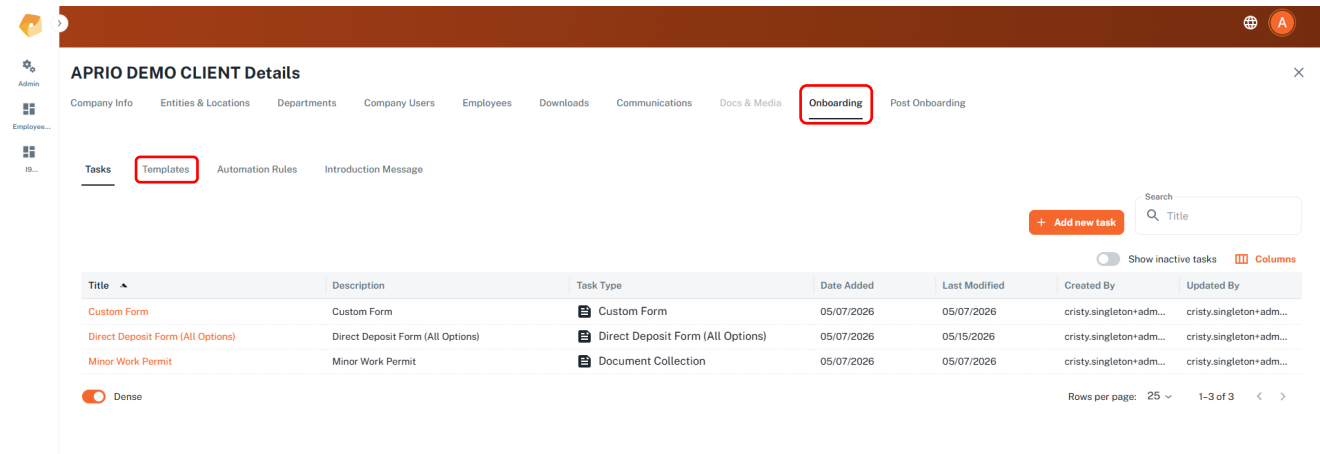
How to create a new template



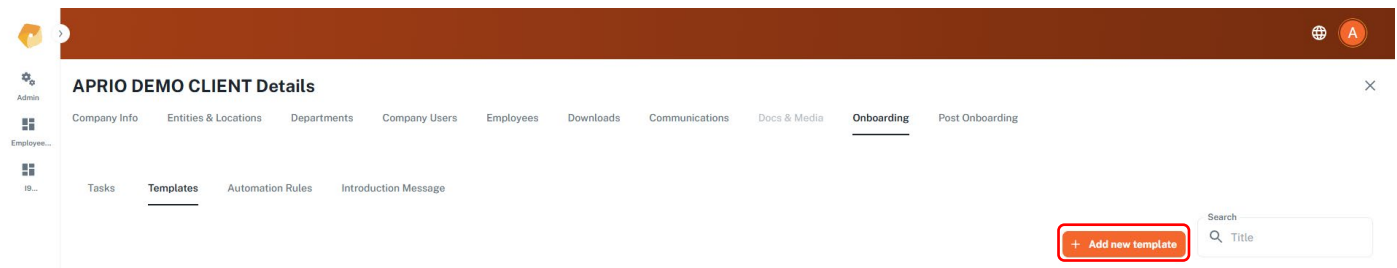
In the **Admin** section, open the Company Details by selecting the open icon next to your company name.



Select the **Onboarding** tab, and then select the **Templates** sub-tab.



Select the **+Add New Template** option.



How to create a new template



On the **Overview** tab, enter a **Template Title**. The **Display Title** and **Description** fields are optional.

Use the **Location** dropdown to choose whether the template will be available at all locations or only specific ones. This step is required before assigning the template to employees.

Click **Save** when finished to create your new template.

A screenshot of the 'Create New Template' form in the Aprio CONNECT application. The interface has a dark brown header bar with a home icon, a globe icon, and a user profile icon. Below the header, there's a sidebar with icons for Admin, Employee..., and a third icon. The main content area has three tabs: 'Overview' (selected and highlighted with a red box), 'Task Library', and 'Change Log'. The 'Overview' tab contains several input fields: 'Template Title *' (with a red box around it and the text 'Template Title' inside), 'Display Title' (with the text 'What appears internally. Used to determine assignments.' below it), 'Description' (with the text 'What appears for employees. Defaults to Template Title if left blank.' below it), and 'Location' (a dropdown menu with a red box around it). To the right of the form is a 'Preview Template' button. At the bottom right, there are 'Close' and 'Save' buttons. A dashed box in the center of the form contains the text 'Add a task to the template from the Task Library tab.'

How to create a new template



Navigate to the **Task Library** tab and select **+ Add** next to any task to include it in the template.

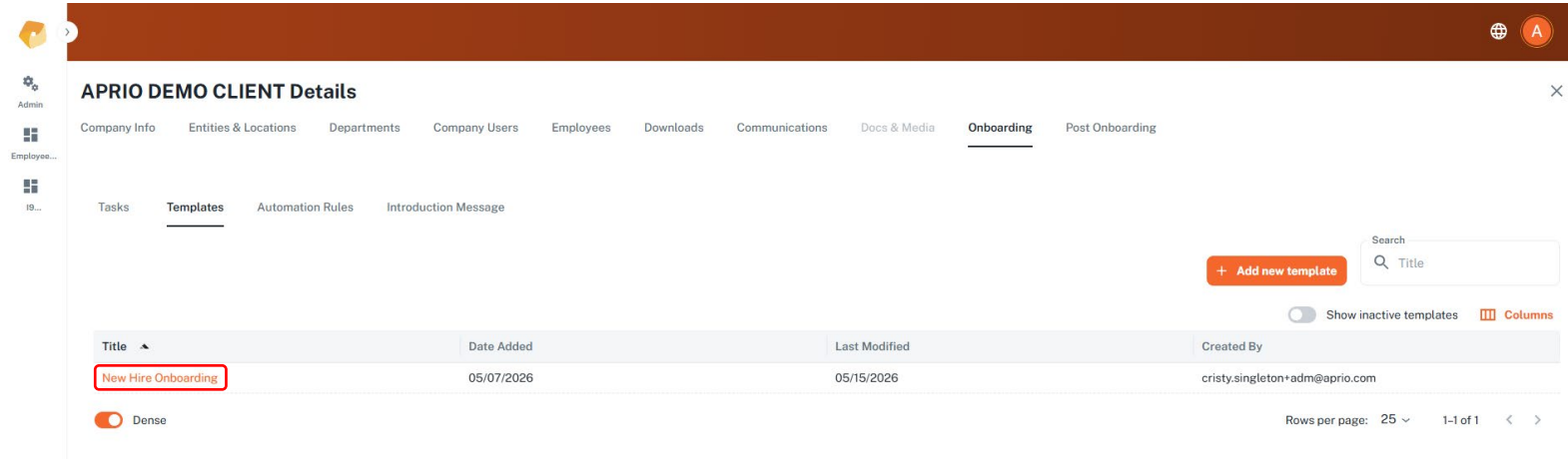
Use the drag handle icon to reorder tasks as needed — task order is flexible for new hires. To remove a task, select **x Remove** next to it.

Select the **Preview Template** to review the onboarding process before finalizing. When ready, click **Save** to complete your template setup.

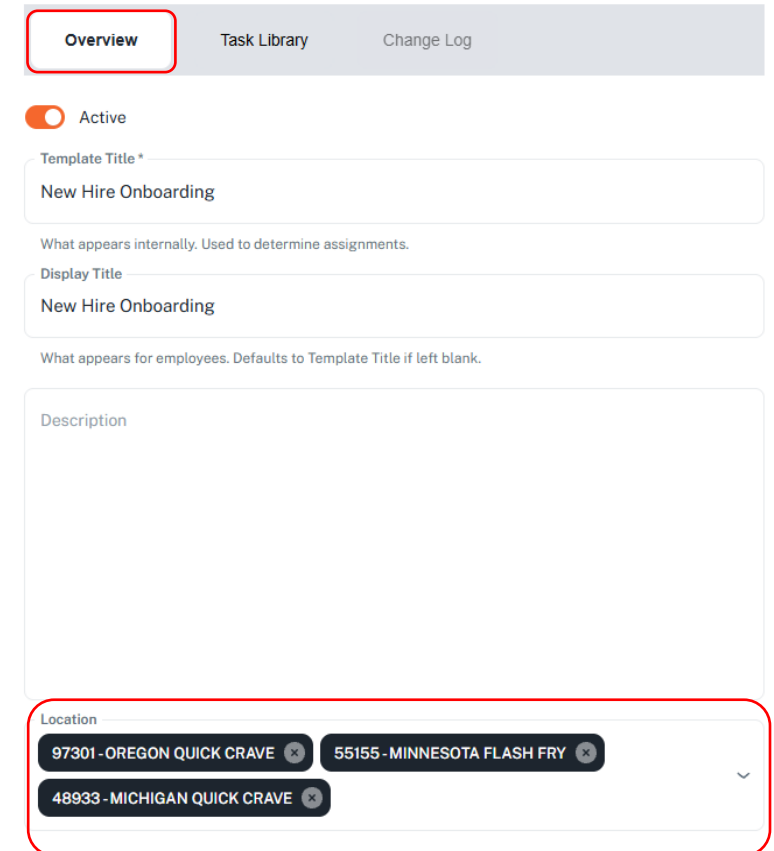
The screenshot displays the Aprio CONNECT user interface. On the left, a sidebar contains navigation icons for Admin, Employee..., and IS... The main content area is divided into two panels. The left panel, titled "Task Library", has tabs for "Overview", "Task Library" (which is selected and highlighted with a red box), and "Change Log". Below the tabs, it states "Added tasks will appear here." and "To manage tasks go to the Onboarding > Tasks tab". A list of tasks is shown, each with a drag handle icon (three dots) and a "+ Add" button. The tasks are: "Form I-9", "Form I-9: Document Upload", "State W4 Form", "Federal W4 Form", "WOTC Intake Form", "Custom Form" (Created: 05/07/2026), "Minor Work Permit" (Created: 05/07/2026), and "Direct Deposit Form (All Options)". The "Form I-9" task's "+ Add" button is highlighted with a red box. The right panel, titled "New Hire Onboarding", shows a list of tasks already added to the template. Each task has a drag handle icon and an "x Remove" button. The tasks are: "Custom Form" (Created: 05/07/2026), "Employee Pay Form" (Created: 05/07/2026), "WOTC Intake Form" (Created: 05/07/2026), "Federal W-4" (Created: 05/07/2026), "State W4" (Created: 05/07/2026), and "Form I-9" (Created: 05/07/2026). A "Preview Template" button (with a camera icon) is highlighted with a red box at the top right of this panel. At the bottom of the right panel, there is a dashed box containing the text "Add a task to the template from the Task Library tab. Drag a card to re-order the template". At the bottom right of the entire interface, there are "Close" and "Save" buttons.

How to create a new template

Your new template will appear in the **Templates** tab after it has been saved.



To confirm that it is available to add to new hires, make sure the template has been assigned to the same location where the new hire was added. This can be completed in the **Overview** tab.



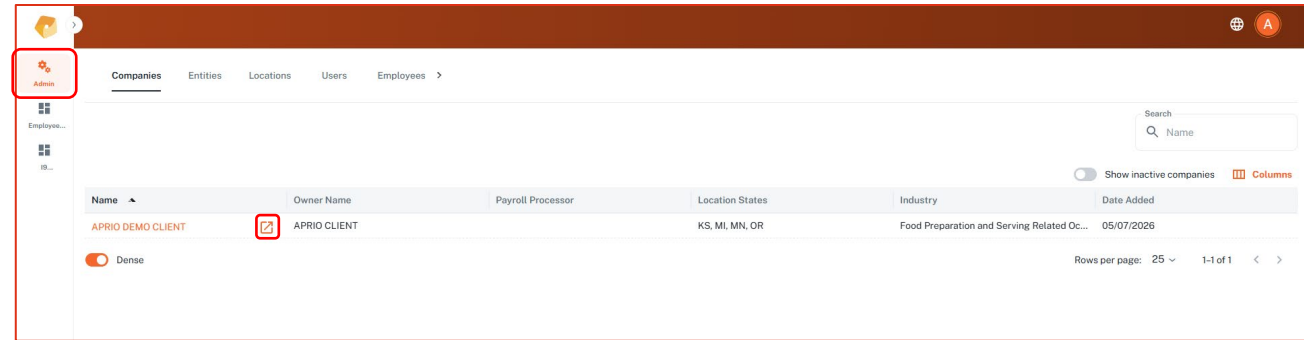


How to edit an existing template

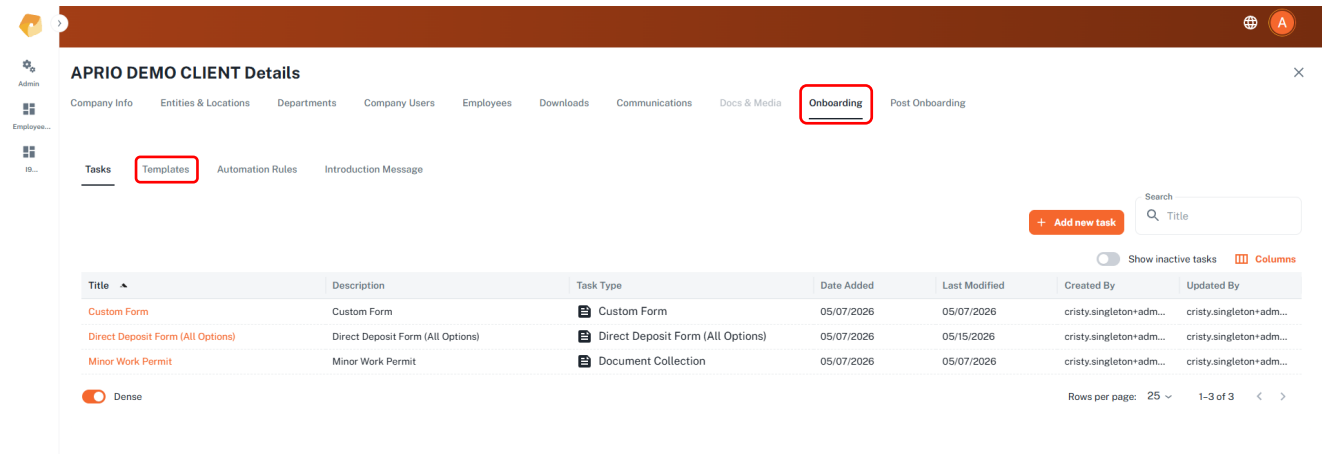
How to edit an existing template



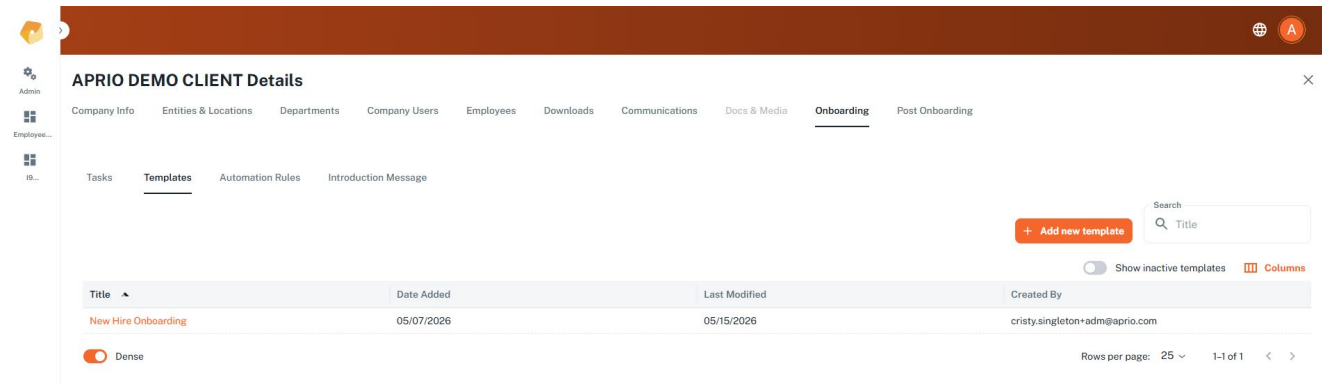
In the **Admin** section, open the Company Details by selecting the open icon next to your company name.



Select the **Onboarding** tab, and then select the **Templates** sub-tab.



Select the name of the template you would like to edit.



How to edit an existing template



On the **Overview** tab, update the **Template Title**, **Display Title**, or **Description** as needed, or use the **Location** dropdown to update where the template is available. Once all updates have been made to this section, click **Save** to apply your changes.

A screenshot of the Aprio CONNECT web application showing the 'Edit Template' interface. The interface has a dark brown header bar with a globe icon and a user profile icon labeled 'A'. On the left is a sidebar with navigation links: 'Admin' (gear icon), 'Employee...' (person icon), and 'i9...' (ID card icon). The main content area has three tabs: 'Overview' (highlighted with a red border), 'Task Library', and 'Change Log'. Under the 'Overview' tab, there are three text input fields: 'Template Title *' (containing 'Template Title'), 'Display Title', and 'Description'. Below these is a 'Location' dropdown menu. A red box highlights the 'Template Title' field, and another red box highlights the 'Location' dropdown. To the right of the input fields is a large light gray box with a dashed border containing the text 'Add a task to the template from the Task Library tab.' and a 'Preview Template' button with a camera icon. At the bottom right of the interface are 'Close' and 'Save' buttons. A small grid of six icons is visible in the center of the main content area.

How to manage users in Aprio Connect



To deactivate the user, turn off the **Active** toggle. To force a password change on the next login, select **Force Password Change**. To resend the user’s sign-up email with their credentials, select **Resend Sign Up Email**.

Edit User RYAN HALL

☒ Active

Force Password Change

Resend Sign Up Email

To add more locations or departments, or change roles and permissions, select **Add Role**. To remove the role, location, or department, select the trashcan icon. Click **Save Changes** once finished.

Roles and Permissions					+ Add Role
Role	Entity	Location	Department	Actions	
Location Manager	APRIO ENTITY	KANSAS FLASH FRY	TEAM MEMBER		
Location Manager	APRIO ENTITY	MINNESOTA FLASH FRY	TEAM MEMBER		
Location Manager	APRIO ENTITY	MICHIGAN QUICK CRAVE	TEAM MEMBER		
Location Manager	APRIO ENTITY	OREGON QUICK CRAVE	TEAM MEMBER		