

AVIONTÉ CONNECT

CONNECT



Paperless Placement: Go Digital with Front Office & Onboarding

Discover how to eliminate documentation barriers, digitize your onboarding packets, and create a seamless paperless placement process.

Introductions

Welcome to **CONNECT!** Thank you for joining our session.



Clarissa Brett

CUSTOMER SUCCESS
MANAGER

SUCCESS



Jen Moore

SENIOR PRODUCT
TRAINER

TRAINING



About This Session

1	Introductions
2	The Challenge We're Solving
3	Strategy 1: Documents Main Menu Tab
4	Strategy 2: Adobe Sign & Questionnaires
5	Strategy 3: Monitoring Progress
6	Implementation Roadmap
7	Q&A



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Why are we here?

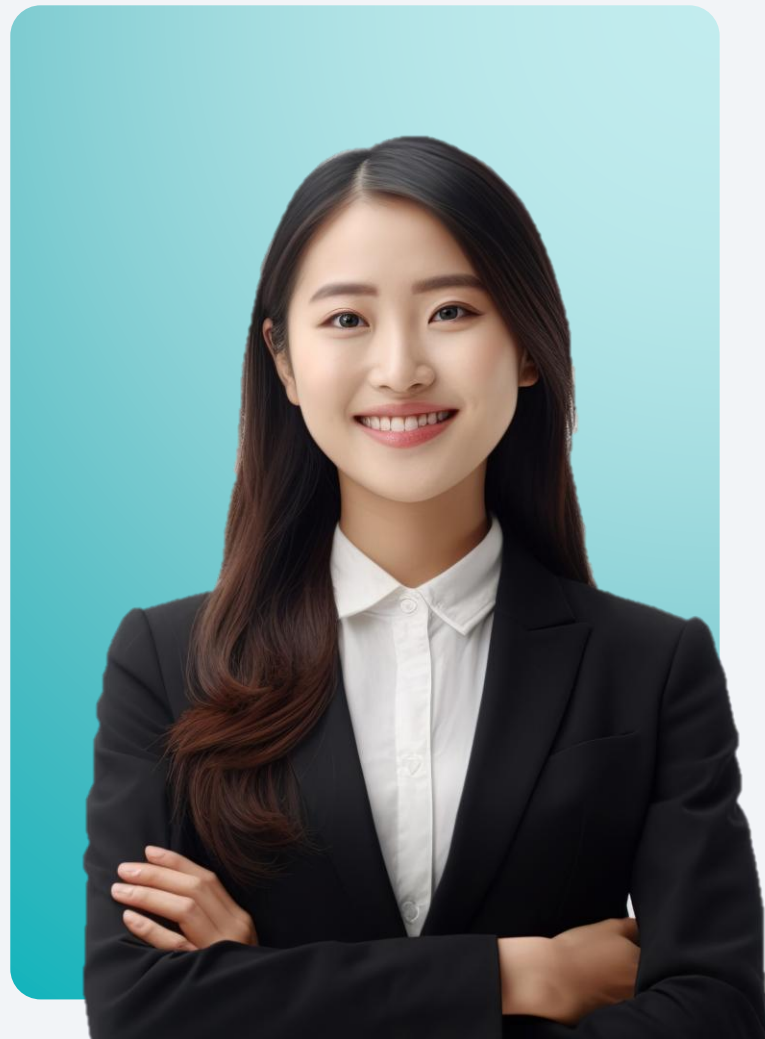
Our goal today in this session is to help firms identify and eliminate document barriers to create more efficient front office placement processes.



BY THE END OF THE SESSION

You will:

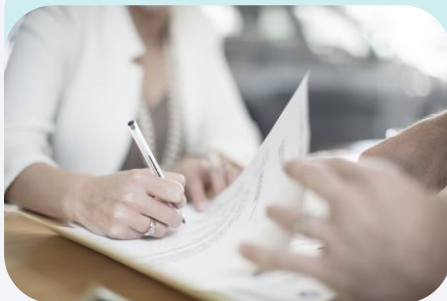
- feel equipped and confident about navigating and implementing paperless placements
- understand the big picture impact this can have on efficiency, sustainability and data management.



Sound Familiar?



Talent who cannot start tomorrow because forms are not back



Recruiters spend 30 minutes tracking down a single signature



A compliance audit that turns into a two-day search through email attachments



Staffing Operations of the Past



Onboarding documents emailed as attachments with no visibility on completion.



Talent required to come in person to sign forms, causing no-shows and delays.



Compliance documents stored in a mix of email, shared drives, and physical folders.



No central view of what is sent, pending, completed, or missing.



Audit prep becomes a manual, time-consuming scramble.



The Cost of Friction in Onboarding

34%

contractor dropout rate when onboarding requires paper or desktop-only access

Stafr, 2025

85%

85% of Gen Z say the entire job search and placement process feels outdated. This matters because Gen Z is now the primary candidate pool.

Talent Talk, 2025



Three Strategies for Paperless Placement

Centralize → Sign Digitally → Monitor & Audit

Strategy 1: Centralize with the Documents Tab



Organization

Create folders by type: job descriptions, handbooks, compliance forms, marketing materials.



Public vs. Private

Share Public folders with talent through the Talent Portal. Keep Private folders internal.

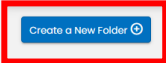
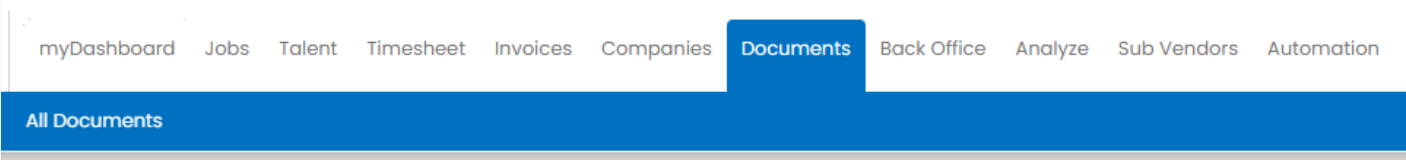


Instant Access

Files available to your full team instantly. No switching to SharePoint, no emailing attachments.

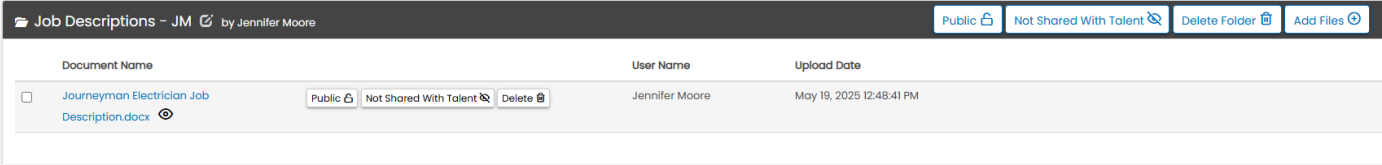
Documents Main Menu Tab

Located here →



← Create folder for documents

Add documents to folder →



Documents Main Menu Tab



**Document Max File
Size**

60 MB



Formats Accepted

DOC, DOCX, TXT, PDF,
PNG, JPG, BMP, XLS,
CSV, PPT



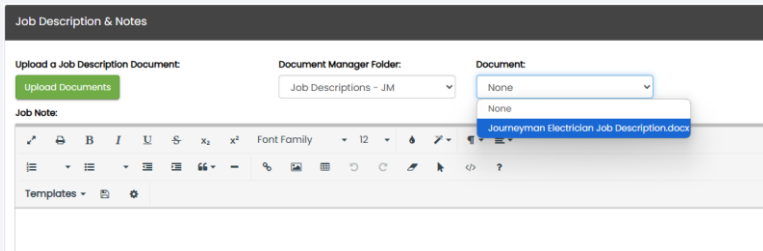
Make Life Easier

Two ways the Documents Tab can make life easier



Job Creation Process

If a user hires for similar jobs over and over, they can attach the Job Descriptions to newly created jobs quickly and easily.



Share Documents to the Talent Portal

Seamlessly share documents with your Talent in their portal with the click of a button



Strategy 2: Collect Signatures the Smart Way



Adobe Sign

For legally executed documents: I-9, W-4, state tax forms, client contracts.

Auto-fill from BOLD. Reusable templates. In-app tracking. Full digital signature trail.



Talent Questionnaires

For acknowledgements and sign-offs: handbooks, safety policies, company agreements.

Signature options: Draw, Type, Checkbox, or combinations. Completes in the portal on any device.

Best practice: Use both tools in one task packet. Adobe Sign handles the I-9 and tax forms. A Questionnaire handles the handbook acknowledgement. One session for talent.

Adobe Sign

Advantages of sending and signing documents through the Adobe Sign integration



Streamline onboarding process



Eliminates the need to switch between platforms



Send documents to employees effortlessly



Tracking to monitor completion status



Auto-fill features allow for direct insertion



Integration supports various file types

Talent Questionnaires

Common ways staffing teams use Talent Questionnaires during onboarding

- Staffing agency policies
- Safety briefings
- Employee handbook & acknowledgements
- Shift preferences
- Skill testing
- Ad hoc data collection

Please answer the following questions:

I understand that I need to bring steel toe boots every day ***Required**

- ☐ Yes
☐ No

My supervisor onsite has given me a tour ***Required**

- ☐ Yes
☐ No

Acknowledgement

By signing, I'm acknowledging that I understand the safety policies and procedures

***Required**

☐

Draw Signature

Type Signature

Clear Signature



Onboarding Task Packets

Onboarding Task Packets

Please choose an Onboarding Task Packet to View/Edit

Clerical Packet - New Hire	Food Service Packet	General Laborer	IT/Professional Packet
Light Industrial Packet - New Hire	Light Industrial Packet - Rehire	New Hire Packet	Warehouse Workers
			



Send & receive
document directly



Employee receives email
when document is ready
for completion



Auto-fill allows for info in
Avionte to be inserted
directly into documents



Avionte provides standard
Adobe templates for both
US and Canada



Symmetry: Paperless Tax Form Onboarding

Symmetry Tasks are built into Avionté 24/7 ONBOARDING to generate correctly completed federal, state, and local tax withholding forms — no recruiter intervention, no manual data entry.



Built into 24/7 Onboarding

Enabled in the Talent Onboarding Tasks utility and powered by a 24/7 ONBOARDING subscription. The federal W-4 is always on; state and local forms turn on as needed.



Guided Mode

Determines and sends the correct federal, state, and local forms from the talent's home address and worksite — and can go out early, before a placement exists.



Broad Form Coverage

US federal W-4 (English & Spanish), 40+ state withholding forms, and Canadian TD1 federal & provincial returns, all kept current.



Fully Paperless Talent Experience

Talent complete and e-sign in the Bold portal or the 24/7 mobile app. The W-4 pre-fills from their record, then finished forms save to Documents and map back to the talent record.

Strategy 3: Monitor Progress Without Chasing

Dashboard Widget - Onboarding Tasks

Live dashboard counts: Sent, Action Required, Completed, Overdue. Each number is a clickable link to task details.

Onboarding Compliance Report

Full view of onboarding documents by office, task type, talent status, and date range. Your Monday morning audit check.

Talent Adobe E-Signature Document

Exports completed e-signature documents by date range. Purpose-built for compliance reviews.

Talent Document Missing Report

Instantly flags talent with incomplete required Adobe documents. Run before every payroll cycle.

Dashboard Widget

Onboarding Tasks Widget



Displays a counter of onboarding tasks which shows the number of tasks/packets that are in Sent, Action Required, or Completed statuses.

Onboarding Tasks

62 Sent Tasks

1 Action Required

157 Completed Tasks

Onboarding Tasks

3 Sent Tasks

0 Action Required

0 Completed Tasks

0 Overdue Tasks

Name	Status	Onboarding Task	Workflow Name	Packet Name	Sender	Date Sent
zz.Jackson zzLong	Sent Tasks	DirectDeposit			Jennifer Moore	Jun 2, 2026
zz.Jackson zzLong	Sent Tasks	PersonalInformation			Jennifer Moore	Jun 2, 2026
zz.Jackson zzLong	Sent Tasks	Federal W4 (2024)			Jennifer Moore	Jun 2, 2026



Paperless Solutions for Onboarding

Monitor task completion status and stay updated every step of the way!

Onboarding Tasks

Status

Onboarding Task

Packet Name

Sender

Sent

Completed

Complete

View document

E-Verify

Complete

Direct Deposit

Jennifer Moore

05/14/26

05/14/26

Complete

Personal Info

Jennifer Moore

05/14/26

05/14/26



See It in Action: Three Steps

1

Send Onboarding Packet

- Talent Profile
- Onboarding tab

Send task packet with Adobe Sign I-9 + Questionnaire acknowledgement

2

Talent Completes

- Talent received notification of tasks to be completed and logs into their portal on any device
- Clicks Start

Completes forms in sequence

3

Monitor Status

- Dashboard → Onboarding Tasks Widget
- Click Sent count for live task list

Can also run the Analyze Report called Onboarding Compliance Report

Your 90-Day Implementation Roadmap

Days 1–30

Foundation

1

- Audit and clean up Documents Tab folders.
- Set up or review onboarding task packet templates.
- Enable the Onboarding Tasks Widget on your dashboard.

Days 31–60

Expand

2

- Build one Questionnaire with a Signature Question Type for your most-used acknowledgement.
- Test the full talent portal experience yourself before sending to candidates.

Days 61–90

Audit Ready

3

- Run the Onboarding Compliance Report and the Adobe E-Signature Missing Report on your current talent pool.
- Audit talent documents to ensure compliance.

Start small. Build habits. Scale with confidence.

How to Know It's Working

Packet Completion

improved in terms of turnaround time

Shorter Delays

in placements due to better compliance



Action Items After CONNECT:

1

Add the Onboarding Tasks Widget to your dashboard. It takes 30 seconds.

30 sec

2

Identify your top three onboarding documents and confirm each one lives in Adobe Sign or a Questionnaire — not an email attachment.

15 min

Questions?

Session Resources

Resource Link	Session Topic
Documents Tab	Strategy 1
Onboarding Tasks Widget	Strategy 2
Use the Adobe Sign Combined Documents	Strategy 2
BOLD Adobe Available Standard Templates	Strategy 2
Upload a Standard Document Form into Adobe Sign	Strategy 2
Create and Send Talent Questionnaires	Strategy 2
Using and Viewing the Adobe Sign Document Audit Report	Strategy 3
Talent Adobe E-Signature Document Missing Report	Strategy 3
Using and Viewing the Adobe Sign Document Audit Report	Strategy 3



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with Front Office and Onboarding**
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