How to Complete Forms via the SiteConnect Mobile App

Here you will learn how to access and complete Forms you have been assigned in the SiteConnect Mobile App

Index:

- [Accessing your Forms](#)
- [Filtering your Forms](#)
- [Accessing your Forms via Site](#)
- [Creating Forms via the Mobile App](#)

Accessing your Forms

To start off with you may have received a notification from Site Connect stating that you have a Form in your profile that needs completing.

The forms that you have been notified to complete by your company will appear on the **Dashboard** of the app as soon as you log in. Just log into the SiteConnect app, then you should see the following **My Forms** box on your Dashboard. this will show the number of Forms you have completed and the number of Outstanding Forms that you have yet to complete
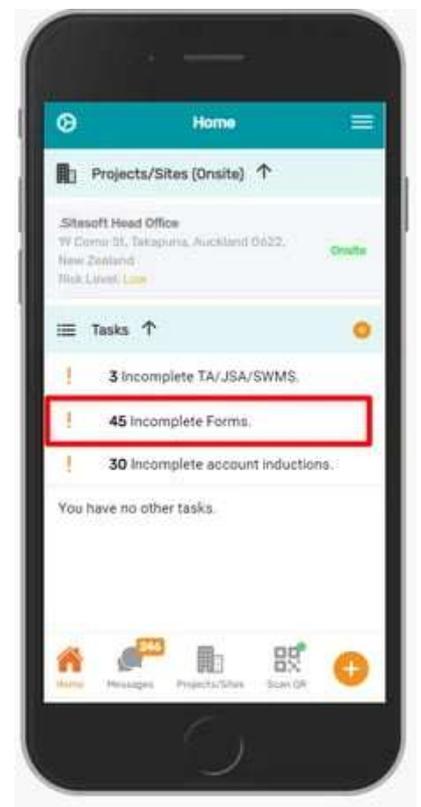
Simply click this box to access a list of all of your assigned Forms. These will show in the Status column as either Assigned (if you have not entered the form yet), In Progress (if you have entered the form and not finished it) or Submitted when this form has been completed.

Click any one of these Forms to then access the content and complete it. You will be able to either fill in information or tick/select options based on the Form that you are completing.

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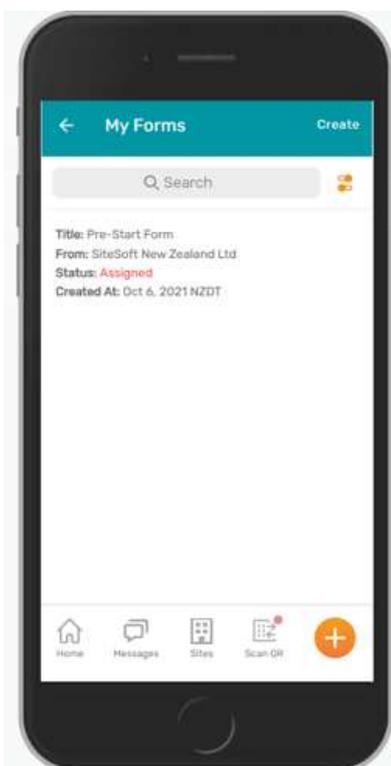
Once you have completed the Form click **Save & Close at the bottom** to submit the form. Your managers will the be notified that you have submitted this and will be able to view your answers on their end.

If you have not finished the Form yet but need to leave you can also click **Save Progress** and come back to the Form at a later time.
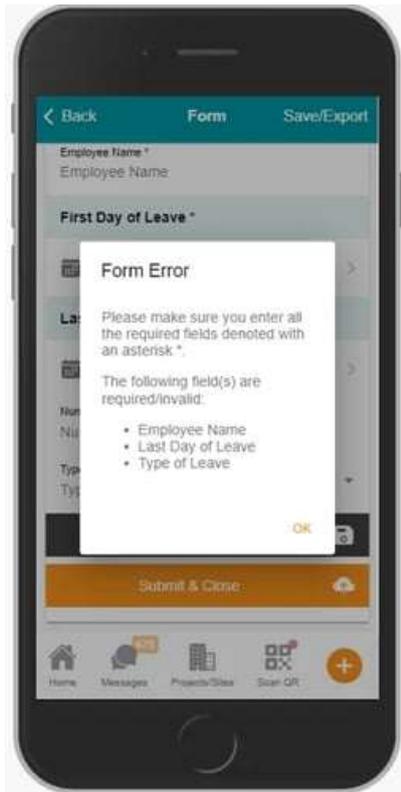
If all required fields have not been completed you will get a prompt advising which fields need to be completed.
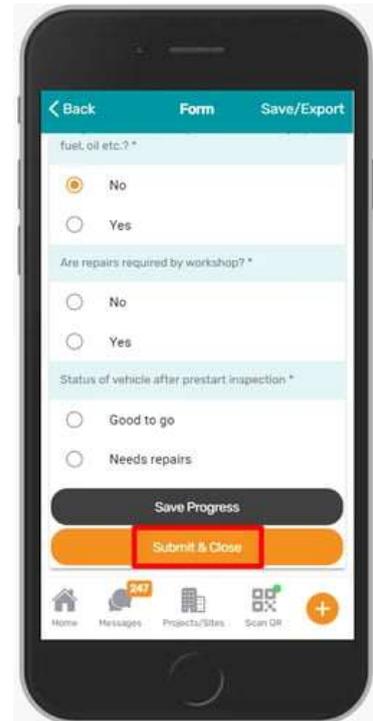
You can also access your Forms by clicking the three horizontal lines on the upper right hand corner and then clicking **My Forms** on the menu that appears.
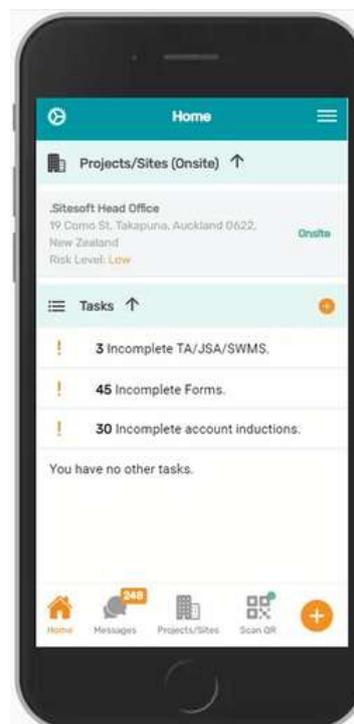
Filtering your Forms

In the **My Forms** menu you can also filter your list to your liking. When you click on MY Forms you can then click the Orange Filter icon on the upper right hand corner next to the Search bar.

From here you can then filter the My Forms list by the following criteria:
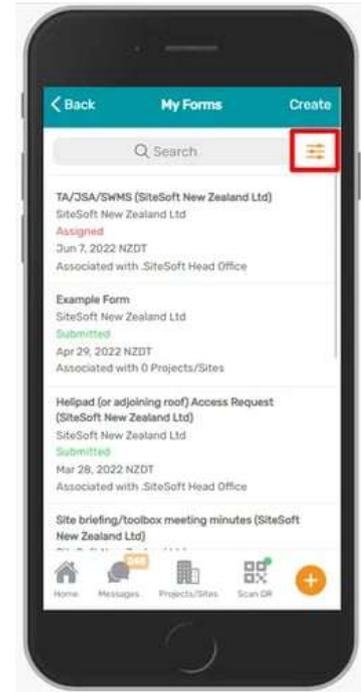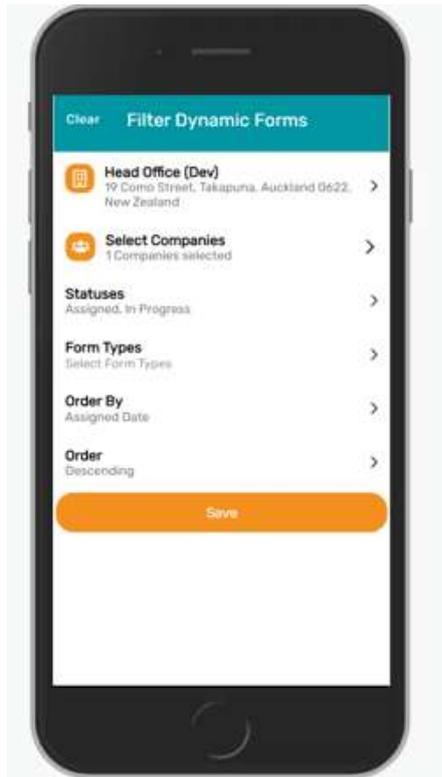
- **Select Sites-** filter the list for Forms relevant to selected Sites at the very top of the page

- **Select Companies-** you can filter Forms which have bee sent to you by specific companies

- **Statuses-** either Assigned, In Progress or Submitted

- **Form Types-** either a standard Form or a Site Induction

- **Order by-** can choose to order the list via the Assigned Date, Form Title (alphabetical) or Form Type

- **Order-** can also choose to order the form based on these other criteria in ascending or descending order

You can also click **Clear** on the upper left hand corner to clear these filters and start again or **click Save** to apply your filters and access your My Forms list again.

Accessing Forms Via the Onsite screen

You can also access your Forms from the Details screen of a site.

To do this go to the Site that you wish to complete the Form for.

Once in the **Details** screen for that Site, click on the **My Forms** icon that appears on this screen.

Selecting Form Templates via the Mobile App

When in your **My Forms** list you will also see the **Create** prompt on the upper right hand corner.
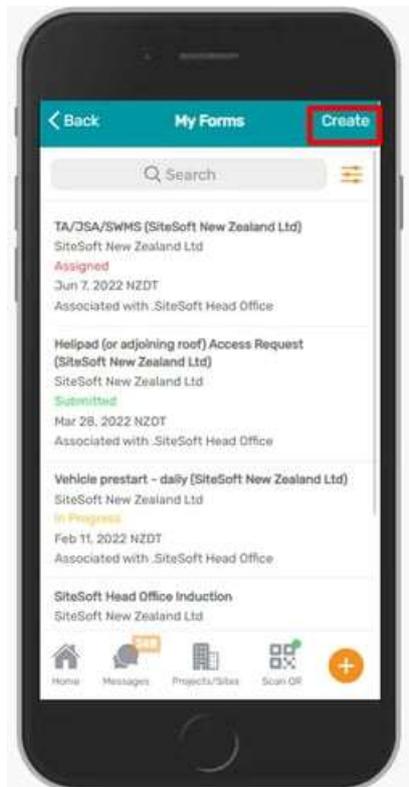
From here you will be able to select **Form Templates** that have been created by Administrators.

When you click **Create**, you will be prompted to select a **Site** to assign the Form to at the top of the page.

This will auto default to the Site that you are currently signed into.

To change the Site the Form is for, please click the Site description at the top of the page and then select the applicable Site by scrolling or searching for it.

Once you have selected a Site, you will need to select a Template.
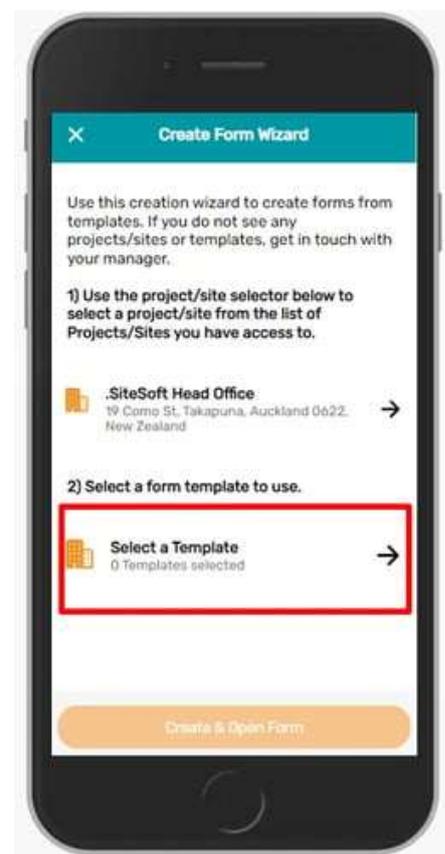
If the template you are looking for is not available please contact the Administrator of the Account.

Once you have selected a Site and a Template, they will be listed on the screen. Click on **Create & Open Form.**

You will then be able to complete this Form and submit it. This will then notify the applicable Administrator that a form has been created and submitted and they will be able to view your Reponses

For any SiteConnect issues or questions, please contact the Support Team via Email: support@siteconnect.io or call us on 0800 748 763.