

Site Level eForms

04/29/2024 4:05 pm EDT

You can upload a Site level eForm two different ways. Follow the steps below and choose the one that works best for you

1) Log into the customers page in question, click on the Sites/Sys tab below, then click on the Site number in question.

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2) Click on the Utilities tab, then click the eForms tab and then click the Add eForm button

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3) Add a name, description and select the eform from the templates drop down and click save

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4) You will be transferred to the assignee screen and you can proceed to send the eForm to the recipient

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5) If you prefer to do this from eForms, log into eForms and then push the Send Template(s) button

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5) Add a Name, Description, Template, Site and then click Save

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6) You will be transferred to the assignee screen and you can proceed to send the eForm to the recipient

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