Vendor Forms: Compliance, Certification, and Credentials

Every vendor who works on your properties brings something with them beyond tools and a truck. They bring qualifications, certifications, safety training, signed agreements, and sometimes a history you need to verify before they set foot on a job site. The Vendor Forms feature gives you a structured way to collect, store, and search all of that information in the same system where you track their work orders, insurance certificates, and service history.

Forms live in the Vendor Portal where vendors fill them out and submit them. The admin side is where you manage which vendors see which forms, review what's been submitted, and search across all submissions when you need to find something specific.

This article covers how the assignment system works, what you can do with it, and how to use it for a range of real-world documentation needs.

What Vendor Forms Are

A vendor form in Sytewise is a structured data collection tool presented to vendors through their portal. It can contain any combination of text fields, dropdowns, checkboxes, file uploads, and digital signatures. When a vendor fills one out and submits it, the answers are stored permanently and searchable from the admin portal.

Forms are built by the Sytewise team. Your job as an admin is deciding which forms your vendors need to complete and under what circumstances. The system gives you precise control over that, with three distinct levels of assignment.

The Three Levels of Form Availability

Understanding how forms reach vendors is the key to using the system well.

Level 1: Platform-Wide Forms

Some forms are made available by Sytewise across all accounts. These appear in every vendor's portal regardless of any action on your part. They typically cover foundational things that any professional vendor relationship might require: basic safety acknowledgments, standard terms of service, or platform-wide credential declarations.

You can see which forms fall into this category from your Forms page. They are displayed in blue and labeled "All Vendors See These Forms."

Level 2: Account-Wide Forms

Your account can designate certain forms as required for every vendor in your roster. When a form is assigned at the account level, it appears in the portal for all of your vendors, not just the ones you specifically targeted. This is the right level for policies and requirements that apply to your entire operation regardless of the specific job or client.

Examples where account-wide assignment makes sense:

- A master vendor agreement that all contractors must sign before working with your company
- A background check authorization form required by your organization's policy
- An emergency contact and incident notification form you need on file for everyone

Account-wide forms also appear in blue with the "All Vendors See These Forms" label, alongside the platform-wide forms.

Level 3: Vendor-Specific Forms

The most targeted level. You assign a form to one specific vendor, and only that vendor sees it. This is where the real flexibility comes in. It lets you apply requirements selectively based on who the vendor is, which client they're working for, or what kind of work they're being asked to perform.

Vendor-specific forms appear in green and are labeled "You Assign These Forms."

The distinction between account-wide and vendor-specific is the core of the system. Not every form needs to go to every vendor. A security clearance form for a client with government contracts only needs to go to the vendors working that client's properties. A specialized chemical handling certification only applies to certain trades. A site-specific safety briefing is only relevant to vendors assigned to that client. Vendor-specific assignment lets you apply the right forms to the right people without cluttering the portal for vendors who don't need them.

Managing Forms from the Admin Forms Page

Navigate to **Forms** in the left menu. The page is organized into two main sections.

The Forms List

The left panel shows all forms currently in play for your account, organized by assignment level. Each form displays with a color-coded badge:

- **Blue** for platform-wide and account-wide forms (all your vendors see these)
- **Green** for forms you have assigned to specific vendors

Clicking on any form in the list loads its detail on the right panel, including a list of submissions with the vendor name, submission date, and the answers they provided. You can expand any submission to read the full response.

Assigning a Form to a Specific Vendor

To assign a form to a specific vendor from the Forms page, select the form from the list and use the assignment controls in the detail panel. The change takes effect immediately and the form appears in that vendor's portal the next time they log in.

The other path to per-vendor assignment is from the vendor's own profile page. Open any vendor, find the HSE Forms section on their profile, and you will see the full list of forms with toggles showing which are currently active for that vendor. Turn any form on or off directly from there. This is the most efficient path when you are onboarding a vendor and want to set up all their required forms in one place.

How Vendors Complete Forms

When a vendor logs into their portal, any forms assigned to them appear in the HSE Forms section of their navigation. Each form card shows the form name and how many times it has been submitted.

Vendors fill out the form directly in the portal. Depending on how the form is built, they may be entering text, selecting options from a dropdown, checking checkboxes, uploading files, or providing a digital signature. When they hit Submit, the answers are captured and stored under their vendor record.

Once-Only Forms

Some forms are designed to collect information that replaces itself each time it is updated. A vendor agreement is a good example: you want the most current signed version on file, not a stack of historical copies cluttering the submissions list. Forms with this behavior are called "once-only" forms.

When a vendor submits a once-only form, their previous submission for that form is marked as replaced. The new submission becomes the current record. This keeps credential and certification forms clean without losing the fact that a new submission was made.

Forms that are not once-only accumulate submissions over time. This is the right behavior for incident reports, safety meeting logs, or any form where multiple submissions represent separate events rather than updates to a single record.

Searching Submissions

The Search Form Submissions section at the top of the Forms page is one of the most operationally useful tools in the system. You can search across every form submission in your account by keyword, and narrow the results by form type and property.

How to search:

1. Type a search term into the search field and click the plus button to add it as a tag. You can add up to four terms.
2. Optionally select a specific form from the "Search What Form?" dropdown to limit results to one form type.
3. Optionally enter a property name in the property filter to find submissions associated with work orders at a specific location.
4. Click **Search Forms**.

The results show each matching submission with the vendor name, the form it came from, the property it was associated with (if any), the submission date, and the specific answers that matched your search terms.

This is powerful when you need to find things you would not naturally remember to look for. If a vendor claims they have a certain certification and you want to verify what was submitted, search their company name and the certification type. If you need to pull every submission mentioning a specific chemical or procedure, search that term across all forms at once. If an incident occurred at a property and you need to find all documentation submitted in connection with it, filter by that property.

Practical Use Cases

The forms system is flexible enough to handle a wide range of vendor documentation needs. Here are examples that show the range.

Vendor Onboarding and Prequalification

A prequalification form sent to all new vendors before they are approved for assignments. Fields include trade certifications held, years of experience, number of licensed technicians, references, and a signature acknowledging they have read and accepted your vendor code of conduct.

Assign it at the account level so every vendor in your roster completes it. Mark it as once-only since the signed acceptance needs to reflect the most current version of your terms. When you onboard a new vendor, the form is already waiting in their portal.

Background Check Authorization

Some clients require background checks for all personnel entering their facilities. Rather than managing this outside the system, a background check authorization form lets vendors complete the required consent and provide the necessary information, then upload the actual check results as a file attachment.

Assign this form specifically to vendors approved to work that client's properties, not to your entire vendor roster. Use vendor-specific assignment for each vendor in scope.

Site-Specific Safety Briefing Acknowledgment

A client with a specific on-site hazard, a secure facility, or a detailed safety protocol needs vendors to confirm they have read and understood site-specific procedures before entering. A safety briefing form with checkboxes for each key requirement and a signature field at the end captures that acknowledgment formally.

Assign this form to each vendor dispatched to that client's properties. The submission becomes your documentation that the briefing was received and acknowledged.

Certification and License Verification

AV integrators often need manufacturers' certifications or specialized training before working on proprietary systems. An annual certification renewal form with a file upload for the certificate, fields for the certifying body and license number, an expiration date field, and a signature field creates a clean record that replaces itself each time a renewed certificate is submitted.

Mark this as once-only. When a vendor's certification expires and they renew, the new submission replaces the old one and you always have the current credentials on file. Use the search function to find any vendor whose submitted certification mentions a specific manufacturer or platform.

Work Authorization for Restricted Clients

Some clients require formal approval before any vendor performs work on their behalf. A work authorization form with fields for the project name, scope of work, authorization date, and a signature from a named client representative gives you a signed record for every job.

Assign this form individually to vendors only when they are being dispatched to that specific client's properties, not as a standing assignment across the whole account.

Incident and Injury Reporting

When something happens on site, documentation needs to happen quickly and consistently. An incident report form captures the essential information while it is fresh: who was involved, what happened, where on the property, what time, what immediate actions were taken, who witnessed it, and whether medical attention was sought.

For injuries, separate forms handle different severity levels: a First Aid Report for minor injuries treated on site, a Medical Aid Report when professional medical attention was needed, and a Lost Time Report for injuries resulting in absence from work.

These forms are assigned at the account level because any vendor could have an incident at any property. Vendors submit immediately following the event. The admin team can search for the submission by property or vendor name and has a complete documented record that supports any follow-up process.

A Near Miss Report form captures events that did not result in injury but had the potential to. These are often the most actionable reports because they identify hazards before someone gets hurt. Making near miss reporting simple and expected is good safety culture, and Sytewise makes it easy to build that expectation into every vendor relationship.

Safety Program Submission

Some clients or jurisdictions require vendors to demonstrate that they have a formal Health, Safety and Environment program in place before being approved for work. An HS&E Program Submission form asks the vendor to document their safety program: whether they have a written policy, who is responsible for safety in their organization, what training their workers receive, whether they carry specific certifications, and what their incident rate history looks like. A file upload field lets them attach their written program documentation.

This is naturally a once-only form, updated when the vendor's program is renewed or revised. Assign it to vendors working clients or jurisdictions with this requirement.

Keeping Submissions Organized

Use descriptive form names. Know which forms are which and why each one exists. When a vendor asks why they are seeing a particular form in their portal, you should have a clear answer.

Tie forms to work orders when relevant. When a vendor submits an incident report related to a specific work order, note the connection. The search tool can find submissions associated with work orders at specific properties, which means your documentation lives in context rather than as a free-floating record.

Review incident-type submissions promptly. An injury report sitting in the submissions list unread is not the same as a reviewed, responded-to record. Set up a workflow where incident-type submissions trigger a notification and a review. Global email preferences on the admin user profile can be configured to alert specific users when submissions come in.

Track certification expiration dates. Once-only forms for certifications tell you the current state but not when they expire. Build a reminder workflow for vendors whose certifications have time limits. A reminder set sixty days before a known expiration date gives you time to follow up before the vendor becomes uncertifiable for work that requires it.

A Note on Form Creation

Forms in Sytewise are built and managed by the Sytewise team. If you need a form that does not currently exist in the system, contact Sytewise with the details of what you need and they will create it for your account. Custom forms are available and the system is flexible enough to accommodate a wide range of field types and structures.

Additional Reading: Setting Up Vendors in Sytewise, WO and Survey Email Preferences, Setting Up Admin Users

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