



SitePro User Manual

Complete Construction Project Management Software

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Table of Contents

1. [Introduction](#)
2. [Project Setup \(Steps 1-5\)](#)
3. [General Usage \(Steps 6-19\)](#)
4. [User Training Matrix System](#)
5. [Mobile App Usage Guide](#)
6. [Support and Resources](#)

Introduction

SitePro is a comprehensive construction project management software that links your site operations to your cloud-based admin panel, providing real-time information at the touch of a button.

Key Features

- Real-time project monitoring and reporting
- Cloud-based dashboard with mobile app integration
- Quality assurance tracking and compliance management
- Progress reporting with Gantt chart visualization
- Document management and drawing controls with automatic revision prompts
- User management with role-based permissions
- BSR compliance and audit trails
- Plot tracking and handover management
- Comprehensive Training Matrix for all registered users



- Offline mode capability for unstable mobile data areas
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Project Setup (Steps 1-5)

Complete these essential setup steps before general usage:

1. Client Setup

Set up clients for access to the SitePro UK software with proper permissions and access controls.

Process:

1. **Navigate to Client Section** and click "Create Client Profile"
2. **Enter Client Information:**
 - **Email Address:** Ensure accuracy - client receives login credentials here
 - First Name, Last Name, Phone Number
 - Birth Date, Company Name, Address
3. **Configure Roles and Permissions:**
 - Set read/write permissions for different modules
 - Assign appropriate access levels based on client needs
 - Configure what audits, RFIs, and blockers they can view
4. **Save and Finalize:**
 - Click "Save Permission" to complete setup
 - Client automatically receives email with login credentials

Important: Email accuracy is critical as this creates the client's account access.

2. Categories & Folder Setup

Create organized drawing folder categories and subcategories for efficient document management across app and dashboard. These categories will be used for role-based access control in Project Setup (Point 4).

Setup Process:

1. **Access Categories Section** and click "Add New"
2. **Create Main Categories:**
 - Construction Issue, Design Stage, O&M Manual
 - Use descriptive names that match your workflow



- Consider access requirements for different user roles

3. Add Subcategories (Optional):

- Create hierarchical structure for detailed organization
- Examples: Drawings → Specifications → Schedules → Reports
- Multiple subfolder levels supported
- Each subcategory can have individual access permissions

4. Access Control Planning:

- **Client Access:** Determine which categories clients should view
- **Trade-Specific Access:** Plan categories for specific trades only
- **Management Access:** Identify management-only categories
- **Public Access:** Categories available to all project users

5. Benefits:

- Enables accurate navigation for app users on-site
- Organizes documents logically by project phase
- Supports complex project document structures
- **Provides granular access control for different user roles**
- **Integrates with Project Setup for permission assignment**

Important Integration: These categories and subcategories will be available for role-based permission assignment when setting up projects (see Point 4 - Project Setup).

Best Practice: Structure folders to match your team's natural workflow and project phases, while considering which user types need access to each category.

3. Plot Tracking Setup

Create traceable work locations for use with fixed-price work items and resource management.

Purpose:

- Track worker locations and prevent scheduling conflicts
- Monitor multiple individuals working in same location
- Enable location-based progress tracking
- Support plot-specific pricing and reporting

Configuration:

1. **Navigate to Plots** and click "Add New"



2. Enter Plot Information:

- **Floor/Location:** (e.g., "B1", "Ground Floor", "N/A")
- **Plot Number:** Sequential numbering recommended
- Use "N/A" if not required for specific projects

3. System Benefits:

- Real-time conflict alerts when multiple workers assigned to same area
- Location-based productivity tracking
- Integration with fixed-price work items (see Point 10)

4. Project Setup

Create your first project or add new projects with complete configuration, including role-based access control for categories and folders created in Point 2.

Initial Setup:

1. Access Jobs Section and click "Add New"

2. Complete Project Details:

- **Client Selection:** Choose from previously created clients
- **Site Address:** Enter complete address including postcode
- **Drawing Folders:** Select applicable categories and subcategories
- **Work Locations/Plots:** Assign relevant plots or select N/A

3. Category Access Control:

- **Assign Folder Permissions:** Configure which users can access specific categories
- **Role-Based Access:** Set different permission levels for:
 - **Clients:** View-only access to approved categories
 - **Site Managers:** Full access to operational categories
 - **Trades:** Access to trade-specific categories only
 - **Subcontractors:** Limited access to relevant work areas
- **Read/Write Permissions:** Control who can view vs. edit documents in each category
- **Category-Specific Roles:** Assign users to categories created in Point 2

4. Geo-Location Integration:



- System automatically creates map pin from site address
- Enables GPS tracking and location-based features
- Supports geo-located audit reports

5. Permission Examples:

- **Design Stage Category:** Architects and engineers (read/write), clients (read-only)
- **Construction Issue Category:** Site managers and trades (read/write), clients (read-only)
- **O&M Manual Category:** Facility managers (read/write), all others (read-only)
- **Health & Safety Category:** All users (read), safety officers (read/write)

6. **Important:** Always click "Update" after making changes to ensure data persistence.

Integration Note: The categories and subcategories created in Point 2 become available here for detailed permission assignment, ensuring proper document access control throughout the project lifecycle.

5. Drawing Uploads

Upload project drawings, specifications, and project documentation to organized folders. The system will automatically prompt you to review and approve new revisions.

Upload Process:

1. **Access Method:** Navigate to "Drawing Controls" and click "Add New"
2. **Project Selection:** Choose relevant project from dropdown
3. **Document Configuration:**
 - **Job Name:** Enter descriptive name with drawing references
 - **Categories:** Select main category and subcategory
 - **Document Type:** Specify type (Drawing, Specification, etc.)
 - **Document Number:** Include reference numbers for version control
 - **Drawing File:** Upload PDF files (recommended format)
4. **Automatic Revision Management:**
 - System automatically detects when new versions are uploaded
 - Prompts administrators to review and approve revisions
 - Maintains version history for audit purposes
 - Ensures teams always work with latest approved drawings



5. **File Management:**

- Use consistent naming conventions
- Include version information in names
- Organize logically within category structure

6. **Completion Options:**

- "Save and Exit" to return to main menu
- "Save and Upload More" to continue adding files

Result: All uploaded drawings become visible to assigned app users under selected categories, with automatic revision control.

General Usage (Steps 6-19)

6. Site Audit Form Setup

Create comprehensive quality assurance audit forms and assign them to projects.

Form Creation Process:

1. **Access Create Forms** and click "Add New"
2. **Basic Configuration:**
 - Select target project from dropdown
 - Name your document (e.g., "Material Storage Checklist")
3. **Question Development Examples:**
 - **Material Storage:** Storage condition compliance
 - **Settings from Drawings:** Drawing compliance verification
 - **Snagging Drawing:** Defect identification protocols
 - **Site Conditions:** General site safety and quality
4. **PDF Integration:**
 - Upload reference PDFs for handheld app viewing
 - Enables field teams to access specifications during audits
5. **Question Management:**
 - Add/remove questions using interface controls
 - Organize questions logically for efficient completion
 - Click "Create Form" to finalize

Advanced Features:



- Each question gets geo-located pins for compliance tracking
- Complete audit trails with time stamps
- Automatic sequential numbering for all audits
- PDF export capability for audit reports

BSR Compliance: Green compliant geo pins demonstrate audit compliance for Building Safety Regulator requirements.

7. Adding App Users to Projects

Manage site-based mobile app users and their project assignments with comprehensive training tracking.

User Registration Flow:

1. **App Download:** Users download "SitePro UK" from app stores
2. **Mandatory Registration:** Complete health & safety and new starter forms
3. **Admin Approval:** Administrators must approve users before site access

Assignment Process:

1. **User Approval:**
 - Review pending registrations in user management
 - Click "Approve" for verified users
 - Click eye icon to configure permissions
2. **Role Configuration:**
 - Navigate to "Roles and Permissions"
 - Set read/write access for different modules
 - Assign users to specific projects
 - Configure job-specific permissions
3. **Project Assignment:**
 - Select relevant projects from job list
 - Use notepad icon for detailed job assignments
 - Configure plot assignments if applicable

Document Storage: All user information, certifications, and compliance documents are securely stored in the Cards/Certificate system with expiration alerts and fully inclusive Training Matrix.



8. Client Dashboard Viewing

Configured clients gain access to real-time project information through their dedicated dashboard.

Client Access Features:

- **Live Information Flow:** Real-time updates from site activities
- **Site Audit Access:** View quality control status and reports
- **Audit Reports:** Access completed audits with PDF downloads
- **Geo-location Integration:** View audit locations on interactive maps

Automatic Features:

- Sequential numbering for Audits, Blockers, and RFIs
 - Time-stamped audit trails
 - PDF generation for audit reports
 - Location tracking for compliance verification
-

9. Progress Reporting

Manage construction programs with CSV import and real-time tracking.

File Requirements:

- **CSV Format Only:** All construction programs must be in CSV format
- **Conversion Required:** Request Asta, Microsoft Project files be converted to CSV
- **Sample File:** Download template to understand required format

Program Setup:

1. Excel Format Requirements:

- Event Level, Task Name, Duration
- Start Date, Finish Date, Predecessors
- Assigned To, % Complete, Status
- Comments, Total Cost

2. System Features:

- Auto-calculates duration from start/completion dates
- Requires consistent date formatting
- Links to site progress updates

Live Integration:



- **App Updates:** Site teams update progress via mobile app
 - **Percentage Tracking:** Progress updated on percentage basis
 - **Auto-Population:** Gantt charts automatically update from field inputs
 - **Export Options:** Updated programs available as PDF or Excel
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10. Price Work Items Setup

Configure measured price work items for trade booking and real-time cost tracking.

Setup Process:

1. **Navigate to Price Work Items** and click "Create"
2. **Item Configuration:**
 - **Item Name:** Descriptive work description
 - **Unit of Measure (UoM):** Specify unit (m², linear meters, each)
 - **Price:** Set unit price for the work
3. **Project Integration:**
 - Assign items to relevant Plots (from Point 3)
 - Click "Update" to make available to site teams

Mobile Integration:

- Site teams select and book work items directly
 - Real-time quantity entry and cost calculation
 - Automatic work value computation
 - Digital audit trail for all completed work
-

11. Blocker Reporting

Track and manage project obstacles with automatic reporting and resolution tracking.

System Features:

- **Daily Reporting:** Items reported via app as they occur
- **Automatic Numbering:** Sequential numbering for accurate tracking
- **Dashboard Collation:** Centralized information management

Management Process:

- Click eye icon to view detailed issue information



- Export reports to PDF or Excel
 - Mark items as complete to close out delays
 - Track resolution timeline and responsible parties
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12. RFI Reporting

Manage Requests for Information with systematic tracking and resolution.

Process Flow:

- **Site Reporting:** RFIs submitted via mobile app
- **Automatic Processing:** Sequential numbering and tracking
- **Dashboard Management:** Centralized review and response

Resolution Tracking:

- View detailed RFI information using eye icon
 - Export comprehensive reports
 - Mark complete when resolved
 - Maintain audit trail for project records
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13. Health & Safety

13.1 RAMS List

Upload all your Risk Assessment & Method Statements for client review and approval.

Form Creation:

1. **Access RAMS Forms** and select "Add New"
 - Upload your Microsoft Word document or PDF
 - System maintains version control and approval history
2. **Customization:**
 - Customize directly in Microsoft Word
 - Upload revised versions as needed

Export and Review:

- Complete RAMS register available for PDF download
- Professional formatting with company branding
- Ready for client submission and approval



- Digital notifications & signatures by all app users

13.2 Toolbox Talks

Upload all your Toolbox Talks for client review and approval with multimedia support.

Form Creation:

1. **Access Toolbox Talks** and select "Add New"
 - Upload your Microsoft Word document or PDF
 - Upload your YouTube Video link for enhanced training
2. **Customization:**
 - Customize directly in Microsoft Word
 - Integrate video content for comprehensive training

Export and Review:

- Complete Toolbox Talks register available for PDF download
 - Professional formatting with company branding
 - Ready for client submission and approval
 - Digital notifications & signatures by all app users
 - Video integration for enhanced training delivery
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14. Fire Stopping & PFP Items

Specialized fire safety reporting and compliance management.

Setup Requirements:

1. **Product Configuration:** Set up available products and manufacturers
2. **Audit Integration:** Items available for app user selection during audits

Audit Process:

- **Drawing Integration:** Utilizes uploaded project drawings
- **Geo-Location:** Each audit auto time and date stamped
- **Compliance Tracking:** Maintains BSR-required documentation

Professional Output:

- **Certificate Generation:** Professional audit certificates
- **Sequential Numbering:** Comprehensive image documentation
- **Test Data Integration:** Complete compliance packages



- **IFC Certification:** Certified installer compliance tracking
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15. Snagging

Comprehensive defect management and resolution tracking system.

Workflow Process:

1. **Site Manager Creates:** Snagging forms for floor plates or individual areas
2. **Documentation:** Images and text uploaded directly from app
3. **Assignment:** Issues assigned to specific tradespeople
4. **Notification:** Tradespeople receive notifications of assigned items
5. **Resolution:** Tradespeople mark items complete when fixed
6. **Verification:** Site manager closes out items after verification

Management Features:

- Mark complete and view snagging audits using eye icon
 - Track resolution status and timeline
 - Maintain comprehensive defect records
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16. POD (Proof of Delivery)

Streamline delivery documentation and material tracking.

Benefits:

- **Time Saving:** Photograph delivery notes on-site as they arrive
- **MOS Documentation:** Valuable notes preserved for applications
- **Digital Storage:** Centralized delivery record management

Process:

- Site teams photograph delivery documentation via app
 - Automatic upload to cloud system
 - Searchable database of all deliveries
 - Export capabilities for project records
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17. Asset Management

Comprehensive equipment and tool tracking system.



Setup Process:

1. **Asset Creation:** Click "Add New" to create asset records
2. **Asset Information:**
 - Sequential numbering (system advises on last number used)
 - Asset name and value
 - Assignment to specific jobs/users

User Requirements:

- **Weekly Check-ins:** Users prompted to upload asset images weekly
- **Risk Reduction:** Reduces equipment loss through regular monitoring
- **Assignment Tracking:** Link tab enables assignment to nominated users

Benefits:

- Real-time asset location tracking
 - Theft prevention through regular documentation
 - Comprehensive asset lifecycle management
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18. Daily Diary

Maintain accurate records of site activities and communications for project documentation.

Importance:

- **Legal Protection:** Accurate records vital for loss and recovery
- **Verbal Confirmations:** Document conversations and decisions
- **Project Timeline:** Comprehensive activity tracking

Process:

- Users complete diary entries via mobile app
- Automatic upload to cloud system
- Professional PDF generation with project details
- Export capabilities for comprehensive records

Content Includes:

- Site attendance and trades present
- Weather conditions and impacts
- Visitor logs and inspections



- Plant hire and equipment status
- Work progress updates
- Material deliveries and issues
- Delays and inspection progress

19. Plot Tracking & Handover Management

Advanced plot tracking system for systematic handover management and client notification.

System Capabilities:

- **Digital Plot Management:** Track plot completion status
- **Real-time Notifications:** Automatic client and trade notifications
- **Colour-coded Progress:** Visual status tracking with color codes

Setup Process:

1. **Job Selection:** Choose target project
2. **Tracker Naming:** Create descriptive tracker name
3. **Sequence Configuration:** Define hold points and completion criteria
4. **User Assignment:** Select app users for progress reporting
5. **Notification Setup:** Configure email recipients for handover alerts
6. **Plot Details:** Create Block, Floor level, and Plot number structure

Advanced Features:

- **Colour Coding:** Visual representation of interfacing trades
- **Percentage Tracking:** App-side progress updates by percentage
- **Automatic Notifications:** Email alerts at 100% completion
- **Excel Integration:** Export tracker data for external reporting
- **Client Communication:** Direct handover notifications to selected users

Email Notifications: Example: "Karl Hodgkiss has Hand Over BLOCK(A) FLOOR(6) Plot Number(3) for Plot Tracker Test plot"

User Training Matrix System

SitePro includes a comprehensive Training Matrix system that tracks and manages all training requirements for each registered user. This system ensures compliance with health & safety regulations and maintains detailed records of competency development.



Training Matrix Overview

The Training Matrix is a fully integrated system that:

- **Tracks Individual Competency:** Records all training completed by each user
- **Monitors Certification Status:** Tracks expiration dates and renewal requirements
- **Ensures Compliance:** Maintains BSR and industry standard compliance
- **Provides Digital Signatures:** Records completion with digital verification
- **Generates Reports:** Comprehensive training reports for audit purposes

Training Categories Tracked

1. Mandatory Health & Safety Training

Site Induction Requirements:

- Site-specific health & safety induction
- Emergency procedures and evacuation routes
- Personal Protective Equipment (PPE) requirements
- Site access and security protocols
- Environmental awareness and waste management

General Health & Safety:

- CSCS Card verification and expiry tracking
- First Aid certification status
- Manual handling training
- Working at height certification
- Confined space awareness (where applicable)

2. Technical Competency Training

Trade-Specific Training:

- Trade qualification verification
- Specialized equipment operation
- Quality standards and procedures
- Installation methodology training
- Testing and commissioning protocols

Digital Platform Training:

- SitePro app usage and navigation



- Site audit completion procedures
- Progress reporting protocols
- Drawing access and revision control
- Digital signature procedures

3. Project-Specific Training

RAMS Training:

- Project-specific Risk Assessments
- Method Statement acknowledgment
- Site-specific hazard awareness
- Equipment and machinery protocols
- Emergency response procedures

Toolbox Talks:

- Daily/weekly safety briefings
- Topic-specific training sessions
- Video-based training modules
- Interactive safety discussions
- Seasonal safety considerations

Training Matrix Features

Digital Tracking System

User Profiles: Each registered user has a comprehensive training profile containing:

- Personal information and contact details
- Employment history and role assignments
- Certification status with expiry dates
- Training completion records with timestamps
- Digital signature archives
- Photo identification and verification

Automatic Alerts and Notifications

Expiry Monitoring:

- 30-day advance warning for certification expiry
- Automatic email notifications to users and administrators



- Dashboard alerts for immediate attention
- Compliance status indicators (Green/Amber/Red)

Training Requirements:

- Automatic assignment of mandatory training based on role
- Project-specific training notifications
- Refresher training scheduling
- Competency gap identification

Compliance Reporting

Individual Reports:

- Personal training record summaries
- Certification status dashboards
- Competency matrices by role
- Training history with completion dates

Company-Wide Reports:

- Overall compliance status across all users
- Training requirements by project
- Certification expiry forecasts
- Competency gap analysis
- Audit-ready compliance documentation

Training Delivery Methods

1. Digital Documentation

Upload Capabilities:

- Microsoft Word documents for text-based training
- PDF training materials and certificates
- Image uploads for certification photos
- Digital signature capture for completion verification

2. Video-Based Training

YouTube Integration:

- Direct video links embedded in training modules
- Progress tracking for video completion



- Interactive elements within video content
- Multi-language support where available

3. Interactive Modules

App-Based Training:

- Mobile-friendly training delivery
- Offline capability for remote areas
- Progress synchronization when connectivity restored
- Touch-screen signature capture

Training Administration

Setup Process

1. **Access Training Matrix:** Navigate to user management section
2. **User Profile Creation:** Complete comprehensive user profiles
3. **Training Assignment:** Assign role-specific and project-specific training
4. **Schedule Management:** Set completion deadlines and renewal dates
5. **Monitoring Setup:** Configure alert preferences and notification recipients

Ongoing Management

Administrator Functions:

- Review and approve training completions
- Upload new training materials
- Assign additional training requirements
- Generate compliance reports
- Manage certification renewals

User Functions:

- Access assigned training materials
- Complete training modules and assessments
- Provide digital signatures for completion
- View personal training dashboard
- Upload certification documents

Integration with Project Management

Role-Based Training



Automatic Assignment: Training requirements automatically assigned based on:

- User role and responsibilities
- Project assignments and locations
- Equipment access requirements
- Client-specific training needs
- Regulatory compliance requirements

Project Compliance

Training Verification: Before project access is granted:

- Mandatory training completion verified
- Certification validity confirmed
- Digital signatures collected
- Compliance status updated in real-time

Benefits of the Training Matrix

For Administrators

- **Comprehensive Oversight:** Complete visibility of training status across all users
- **Automated Compliance:** Reduces manual tracking and ensures nothing is missed
- **Audit Readiness:** Instant access to compliance documentation
- **Risk Mitigation:** Proactive identification of training gaps
- **Efficiency Gains:** Streamlined training management processes

for Users

- **Clear Requirements:** Easy access to training requirements and deadlines
- **Progress Tracking:** Visual progress indicators and completion status
- **Mobile Access:** Complete training anywhere with mobile device
- **Digital Records:** Permanent digital record of all training completed
- **Renewal Reminders:** Advance notification of renewal requirements

For Clients

- **Compliance Assurance:** Confidence that all site personnel are properly trained
- **Audit Trail:** Complete documentation for regulatory compliance
- **Real-time Visibility:** Current status of workforce competency
- **Risk Reduction:** Minimized risk through verified training compliance



Data Security and Privacy

Secure Storage: All training records stored with enterprise-level security **Privacy Protection:** Personal data handled in accordance with GDPR requirements **Backup Systems:** Regular automated backups ensure data preservation **Access Control:** Role-based access ensures appropriate data visibility

Mobile App Usage Guide

The SitePro UK mobile app provides comprehensive field management tools with offline capabilities. All features include video tutorials for detailed instructions.

Available Features:

1. **Site Audit** - Complete quality assurance audits with photo documentation
2. **Site Progress Report** - Update task completion percentages with progress notes
3. **RAMS** - Access safety documentation and complete safety checklists
4. **Drawing Control** - Access project drawings and specifications
5. **RFI** - Submit information requests with photo documentation
6. **Blocker Report** - Report project obstacles with photo evidence
7. **Time Sheet & Price Work Items** - Clock in/out functionality and task time tracking
8. **Snagging Report** - Report defects with categorization and photo documentation
9. **Fire Stopping** - Specialized fire safety reporting and compliance
10. **Expenses** - Submit expense claims with receipt capture
11. **POD** - Document delivery proof with digital signatures
12. **Asset Management** - Equipment check-in/out and maintenance scheduling
13. **Contact the Office** - Direct communication and emergency contact
14. **My Details** - Personal profile and certification management

App Installation:

Android Users:

- Search "SitePro" in Google Play Store
- Install "Site Pro UK" - The Construction App
- Business category, rated for ages 17+

iPhone Users:

- Search "SitePro UK" in Apple App Store
- Install "The Construction App"



- Complete registration and mandatory forms

Offline Functionality:

- **Work Offline Mode:** Continue working in areas with unstable mobile data
- **Data Synchronization:** Automatic sync when connectivity is restored
- **Local Storage:** Temporary storage of data until upload possible
- **Queue Management:** Pending uploads queued and processed automatically

Getting Started:

1. Download and install appropriate app version
2. Complete registration with accurate information
3. Fill out mandatory health & safety and new starter forms
4. Wait for administrator approval
5. Complete assigned training modules via Training Matrix
6. Begin using assigned project features

Support and Resources

Technical Support

- **Website:** www.site-pro.app
- **Email:** info@site-pro.app
- **Phone:** 0161 883 0103

Video Resources

- **Integration Page:** www.site-pro.app/integration
- **YouTube Channel:** @HowtouseSiteProUK
- Complete video tutorials for all app features

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System Requirements

- **Mobile App:** iOS 12+ or Android 8+
- **Web Dashboard:** Modern web browser with internet connection



- **File Formats:** PDF for drawings, CSV for project programs, Word/PDF for training materials

Best Practices

- Regular data backups and system updates performed by SitePro
- Consistent naming conventions across all documents
- Comprehensive user training and onboarding via Training Matrix
- Proper document version control with automatic revision prompts
- Regular review of user permissions and access levels
- Proactive training compliance monitoring

Troubleshooting

- Ensure stable internet connectivity for sync operations
- Use Work Offline Mode for unstable mobile data areas
- Clear app cache for performance issues
- Keep apps updated to latest versions
- Contact support for technical difficulties
- Check Training Matrix for any pending training requirements

Training and Onboarding

- All new users automatically enrolled in Training Matrix
- Mandatory completion of health & safety modules before site access
- Role-specific training assigned based on job responsibilities
- Ongoing competency monitoring and renewal management
- Digital certification and signature tracking

This comprehensive manual is designed to help you maximize the benefits of SitePro's construction management platform. The integrated Training Matrix ensures all users maintain current competencies and comply with industry standards. For additional support, training, or technical assistance, please contact our team using the information provided above.