Project Management in myComply

Start Guide for General Contractors
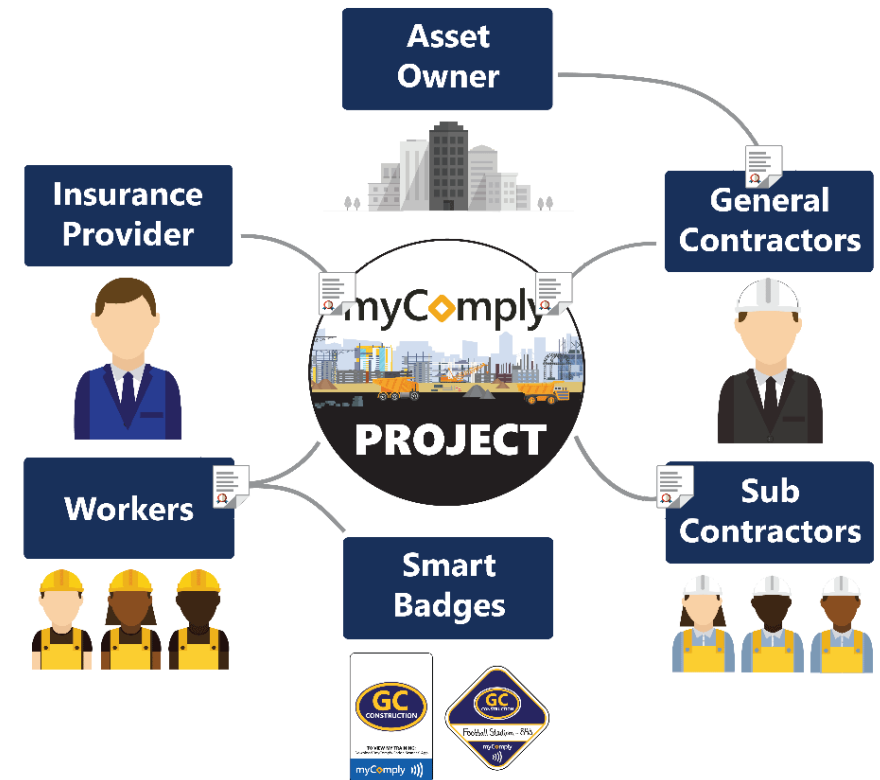
myComply

Compliance Documentation Where & When You Need It.

We keep you protected from liability that comes from mismanaged compliance documentation.

Are you protected?

Follow this <u>user guide</u> to get started today.

Get Started

Registration

Quick!

Simple!

Free!

Register Now

Once registered, use your credentials to login at https://mycomply.net/Account/Login.

Integrations

Are you registered with one of our software partners?
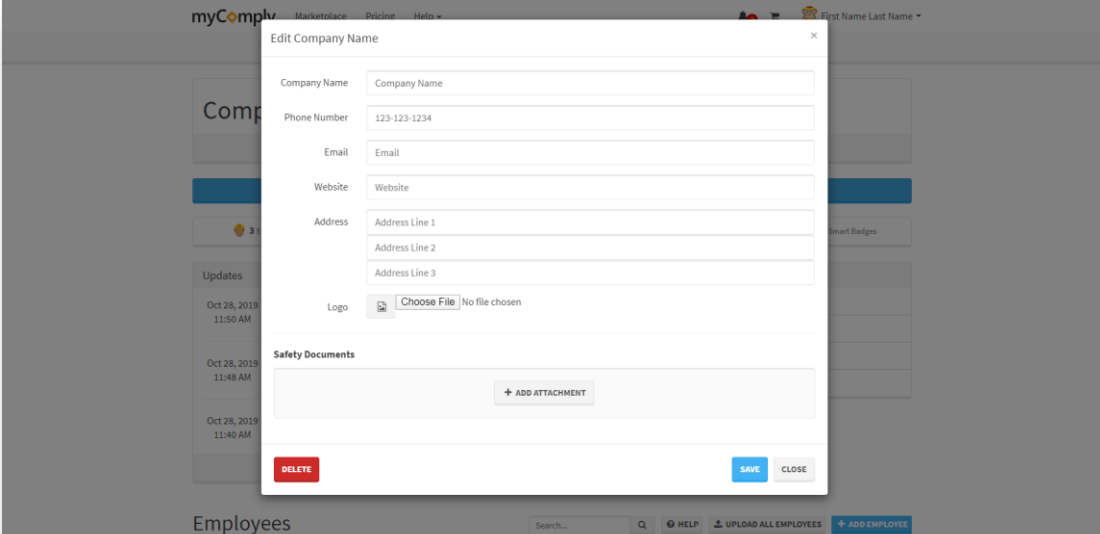
PROCORE   PlanGrid
               AN AUTODESK COMPANY

Remove duplicate entry by using your Procore or PlanGrid credentials during login today.

Once in myComply, access **Integration Settings** to import projects and employees then invite subcontractors. Learn more.

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team@myComply.net
1 (877) 583-9303

www.mycomply.net

Step 1. Company Profile

- Once registered, optimize your **Company Profile.**

- We recommend you store the latest edition of all company **Safety Documents** on your Company page.

- All employees with access will be able to download the company files and to view the company profile.

Pro Tip Upload the highest quality *company logo* as this is the logo that will be printed on Smart Badges.

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Step 2. Employee Records

- Either add one employee at the time or select **Upload All Employees** to bulk update your Company records. Download the excel template provided. Import completed spreadsheet into myComply.

- Once reviewed and uploaded, search the name of Employees requiring additional access. Once found, click Edit to set their **Permission**.
    - Personal – only access personal profile and notify company admins of changes
    - View – access personal profile and company data without edit access
    - Admin – edit company data and employee records, including projects

> **Pro Tip** If you include an *email* or *phone number* when you add employees, they will receive an invite to myComply.

Step 3. Training & Certifications

- With employees in myComply, you can now add and track training certifications on your employee records.

- Either add one certification at a time, or select **Upload All Certifications** to bulk update your Company records.

- Download the excel template provided. Add your certification and training records with date of issue and expiry then import completed template into myComply. If training does not expire, leave column *blank*.

Pro Tip As an administrator to your Company, you will **receive a weekly email giving you a 2 month forecast of all upcoming expiries**. If you give employees access to myComply, they will also be notified (1 month, 2 weeks and day of).

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Step 4. Create Project

- With your company data optimized, you are ready to use Projects effectively.

- **Create a Project** through the drop-down and set the project profile details. This will be viewable by all companies on the project.

- Once created, you will be able to set the **Safety Standard** for your sub-trades and invite them to share their myComply company records with you.
  - Basic
  - Premium
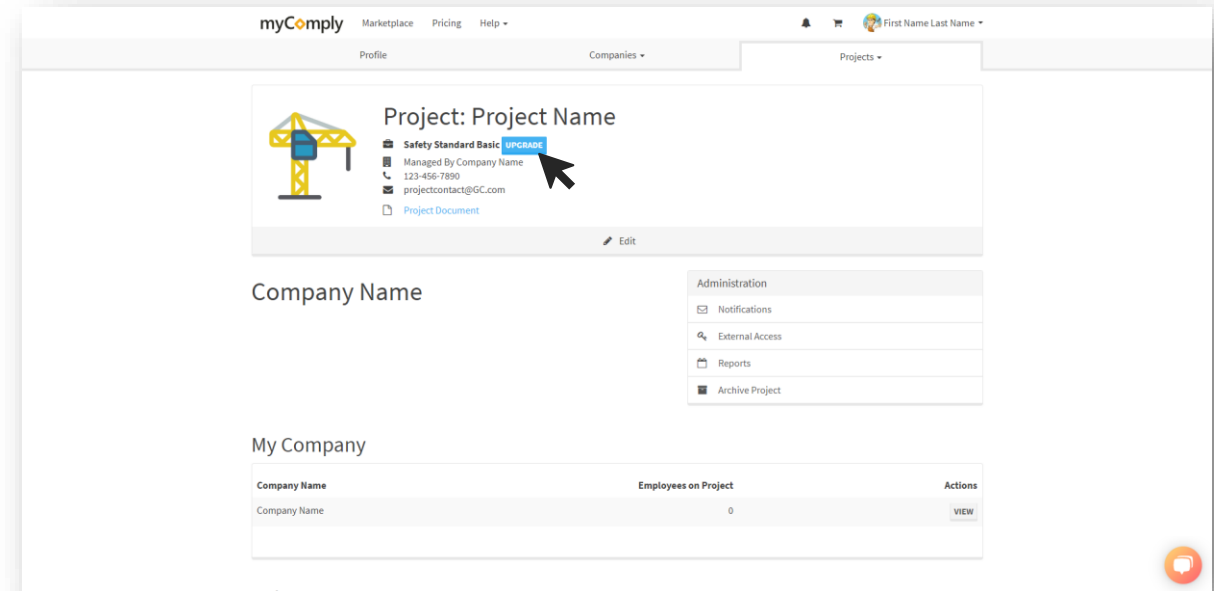
Pro Tip Upgrade your safety standard to **Premium** to access advanced safety features, including automated reporting, Smart Badge technology and access control hardware.

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Step 5. Add Subcontractors

- Invite your sub-trade organizations by clicking **Add Subcontractor** and include an email or phone number. The subcontractor will be contacted via text or email from myComply on behalf of your organization. When they click **Get Started**, they go step-by-step through your requirements and register to myComply for free.

- Track the invitation status on the Project page and begin communicating to your subcontractor in myComply once **Accepted**.

- If subcontractor is a Smart Badge user, simply **Import Badge** to add their company and profile information.

> **Pro Tip** Avoid using the **Generic Invite** which is untraceable. By adding an email or phone number when adding subcontractors, the myComply support team will be able to identify the user and assist them through setup seamlessly. Only use *Generic Link* if required.

Sample Email Template ✉

Good Day Subcontractor,

In accordance with occupational safety and health standards along with local law requirements, { **GC Company** } is required to collect and verify all safety training for workers on their projects.

As such, we are now requiring all subcontractors to use the web service **myComply** to manage their employees' training and submit certification proof to { **GC Company** } for each worker on each project.

myComply is a free service that allows construction companies to store, manage and share their team's training records. You should use myComply moving forward to manage training for all employees as you will get notified of expiry dates and can seamlessly submit training to { **GC Company** } and all other project coordinators in the network.

Our team will generate Smart Badges for all workers during project orientation to use to check-in and check-out of the job site. Thus, we require all employee records with training to be entered in myComply and submitted to { **GC Company** } **before** { **Orientation Date** }.

Register for myComply at https://mycomply.net/Account/Register and use the Getting Started Guide attached to quickly add your company records. If you need a hand navigating myComply, book a free orientation meeting with a product support specialist here.

If you have any questions, please contact myComply support at 1-877-583-9303 or team@mycomply.net.

Have a safe day,

{ **GC Contact** }

Download Subcontractor Getting Started Guide

Step 6. Set Document Requirements

- Upload all **safety documentation and orientation forms** that you require from subcontractors to safely orientate on site. This may be a template they must download and send back, or the name of a document you require from their organization. You may upload all file types in myComply.

- When uploading, identify which subcontractors the **Document Requirement** is applicable to.

Pro Tip Enable company admins to be notified of submission by adding them a **Notifications** recipient on the Project.

Document Requirements   **+ ADD DOCUMENT REQUIREMENT**

Document ⇕	Template File ⇕	Actions
Required Document Name	Download	EDIT

+ Add Document Requirement

Step 7. Set Certification Requirements

- Create a thorough list of all required certifications & training for the project's workforce. Your subcontractor will be responsible for uploading the associated proof with expiry date for your project records.

- Click **Add Certification Requirement** and assign to appropriate Subcontractors. For example, roofers and electricians typically require unique training.

- Your subcontractor will see the requirements and upload **Employee** records into their personal Company profile. Once uploaded, their Company admin can identify which Employees will be on site and share the information requested.

> **Pro Tip** Create urgency by setting a **Deadline** for subcontractor companies by adding a date in the subcontractor company profile.

Certification Requirements

+ ADD CERTIFICATION REQUIREMENT

Your project currently has no certification requirements , to create your first certification requirement click here

+ Add Certification Requirement

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Step 8. Communicate on Requirements

- Stop chasing people and information by centralizing project communication where you securely store and share safety records.

- With subcontractors invited to the Project and requirements assigned, Company Admins can now **Approve or Reject** submissions as they are received, including viewing worker's training with proof.

- Add a **Comment** to clearly communicate with your subcontractors, especially when rejecting submissions.

Pro Tip Use comments productively to reduce the number of emails or phone calls required to safely orientate all workers on your job site. Save up to 80% of your time administrating projects with myComply.

Step 9. Order & Program Smart Badges

- Easily access myComply Employee records on-site with myComply's **Smart Badge technology**, including worker photo, training proof and emergency contact information.

- To get started, fill out this form with your preferred badge option. *Badges should be ordered min. 4 weeks prior to project orientation date.*

- Once received, **program the card or decal** to either your Company's employee or a worker on your Project then distribute badges to workers during orientation. *A USB writer is provided with all first time Smart Badge orders to enable the programming in our Desktop App.*

Watch video(s)!

Pro Tip All employee records should be updated in myComply *before* you begin programming badges. If issuing a Project-only badge, be sure that record is also linked to the Project and Employee is *approved*.
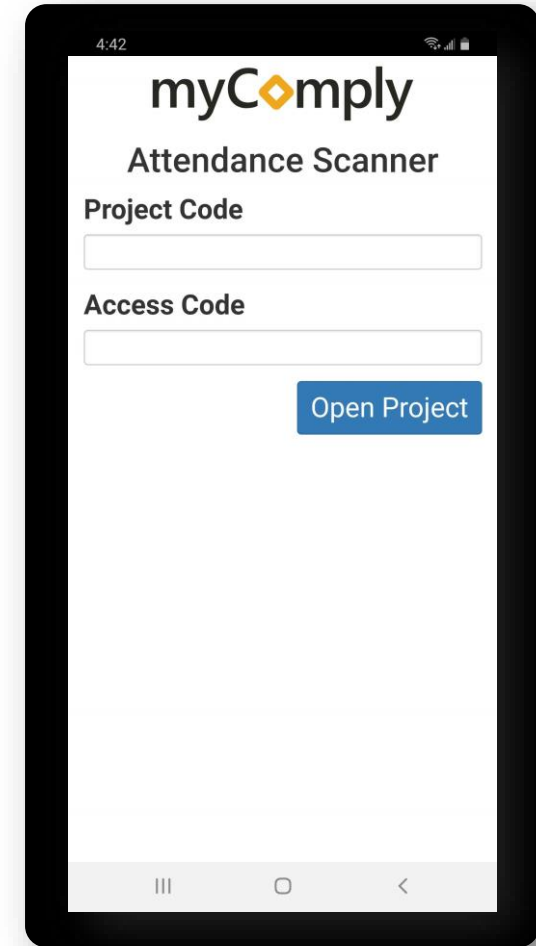
Step 10a. Track Attendance Onsite

MOBILE CHECK-IN

- When you create a Project in myComply with *Premium* Safety Standards, you can set up a mobile station under **External Access**.

- View **Project Code** and manually generate unique **Access Code(s)** for all security personnel or site staff under Administration.

- With codes, onsite personnel can **check in and out** all workers and visitors with their Smart Badges by downloading the [myComply Attendance Tracking App](#).

> **Pro Tip** If a badge is *not issued by the General Contractor* in time, they can manually input attendance records or scan Smart Badges provided by other contractors or trainers, including [myComply SST Cards](#). Security personnel will see they are "Not on Project" and you can determine proper protocol.
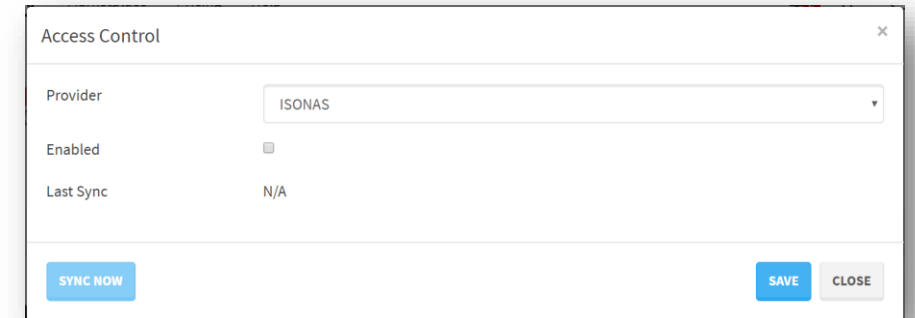
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Attendance Scanner

Project Code

Access Code

Open Project

Step 10b. Track Attendance Onsite

TURNSTILE CHECK-IN

- When you create a Project in myComply with *Premium* Safety Standards, you can sync your turnstile under **Access Control**.

- With a myComply compatible turnstile, **check in and out** all workers and visitors with their Smart Badges.

Contact sales@mycomply.net to order a turnstile.

Access Control   ×

Provider   ISONAS   ▾

Enabled   ☐

Last Sync   N/A

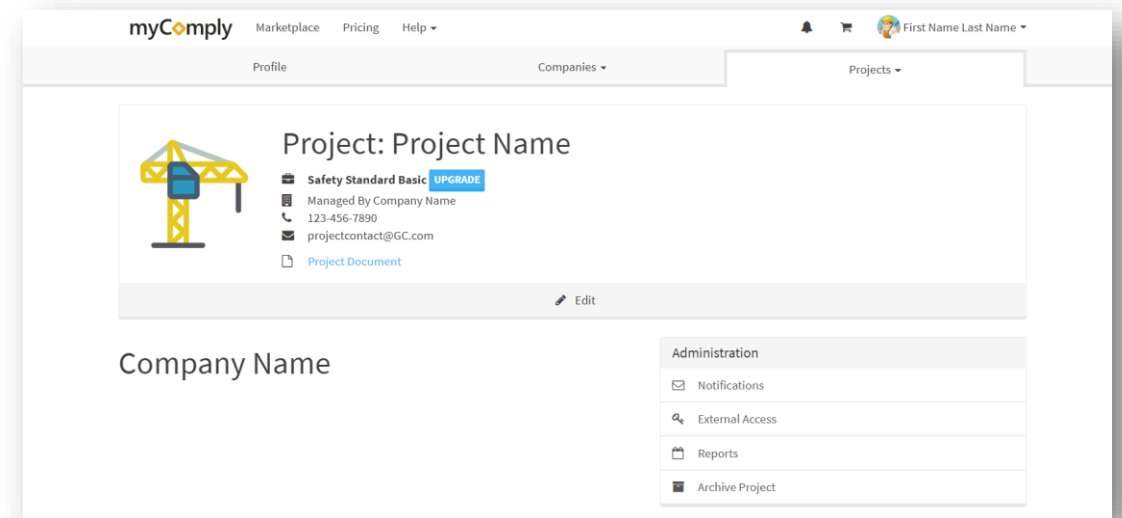SYNC NOW   SAVE   CLOSE

Pro Tip If a worker does not have a Smart Badge, download the myComply Attendance Tracking App and review Step 10a to log check in and out events.

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Step 11. Access Daily Compliance Log

- Download compliance **Reports** in the Administration panel of your project.
    - Daily Compliance Log
    - Attendance Tracking Log
    - Subcontractor Record in PDF

- When a project is in New York City, you will also see an **LL 196 Report** automatically generated to the Project to ensure you comply to DOB requirements. Learn more.

- To take full advantage of all reports in myComply, we recommend using a mobile or access-controlled kiosk with Smart Badges.

Pro Tip If you are a Premium Project user who has **Procore** synchronized, access a *Daily Compliance Log* directly in the Documents section of Procore.

myComply   Marketplace   Pricing   Help ▾   🔔 🛒 First Name Last Name ▾

Profile   Companies ▾   Projects ▾

Project: Project Name
Safety Standard Basic UPGRADE
Managed By Company Name
123-456-7890
projectcontact@GC.com
Project Document

✏ Edit

Company Name

Administration
✉ Notifications
🔍 External Access
📅 Reports
🗄 Archive Project

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Congratulations 👏

- You're ready to start **managing your company's safety and training certifications** with ease, doing away with file folders of certifications and outdated excel spreadsheets!

- Access training resources [here](#).

- If you want a comprehensive **walkthrough** of the myComply platform or have a unique use case you need assistance with, be sure to [book a web demo](#) with our Success team.

- Submit **feedback & questions** to team@mycomply.net anytime!

Help your Network

Share the power of **myComply's free platform** with the construction companies in your network!

Do you know a General Contractor that is drowning in duplicate administration tasks or needs help securely badging their workforce?
Contact sales@mycomply.net with the contact details.

Should all the Subcontractors you trust be using myComply too?
Contact team@mycomply.net with a list of companies.

Do you have a Safety Trainer you wish to join the Marketplace for easy course scheduling?
Contact sales@mycomply.net with a list of your certified trainers.

Already using myComply, but would like to give your internal team access?
Add Employee on the Company page, or email team@mycomply.net.