

Show a form on the staff mobile app

Turn on the Staff mobile app switch for a published form in Reports & Forms so support workers can use it in the Staff App, and turn it off again.

WHO IT IS FOR Owner, Admin	TIME NEEDED About 5 minutes	LAST REVIEWED 2 October 2026
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Who this is for

Permissions: You need permission to manage report templates (Can manage report templates). Owners and Admins have it by default. With view access only, the switches are greyed out and cannot be changed.

Before you begin

- You are signed in to BondiByte on a computer.
- The form is published. See Publish a form.
- Your support workers use the BondiByte Staff App on their phones.



Steps

1 Go to Configuration > Reports & Forms

- 1 In the left menu, under **Administration**, choose **Configuration**. The Configuration page opens with a card for each area.
- 2 Under **System**, choose **Reports & Forms**. The template library opens.

Choose Configuration in the left menu (1), then Reports & Forms under System (2).



2 Check that the form is published

- 1 On the **Organisation templates** tab, find the form by its name, for example Sample Progress Check, the form published in Publish a form.
- 2 Check that its **Status** says **Published**.
- 3 Find the switch in the **Staff mobile app** column. It is off until you turn it on.

Important: A form only reaches the Staff App when it is published and its switch is on. If the **Status** says **Draft**, publish the form first.

NAME	STATUS	VERSION	STAFF MOBILE APP
Sample Daily Check	Published	v1	☒
1 Sample Progress Check	2 Published	v1	3 ☐
Rows 50 ▼			

Find the form (1), check that its status is Published (2) and find its Staff mobile app switch (3).

3 Turn on the Staff mobile app switch

- 1 On the form's row, choose the switch in the **Staff mobile app** column. It turns on.

A message at the top right of the page confirms that the form is now shown on the staff mobile app.

Note: The switch applies to your whole organisation. It is saved as soon as you choose it, so there is no Save button. Pointing at a switch shows **Allow support workers to create this form from the mobile app**.

NAME	STATUS	VERSION	STAFF MOBILE APP
Sample Daily Check	Published	v1	☒
Sample Progress Check	Published	v1	1 ☒
Rows 50 ▼			

Choose the switch on the form's row (1). It turns on.



4 Check the built-in forms on the **Built-in templates** tab

- 1 Open the **Built-in templates** tab. Every BondiByte form has the same switch, so you do not need to duplicate a built-in form to show it on the Staff App.
- 2 A built-in form such as **Client progress** is off until you turn its switch on, in the same way as your own forms.
- 3 **Client shift report** and **Incident report** show **Always available on the staff app**. Their switch is on and cannot be changed.

TEMPLATE	STAFF MOBILE APP
Appointment or meeting report Capture meetings, appointments, decisions, and action items.	☐
Behaviour support report Capture behavioural context, observations, response strategies, and follow-up.	☐
Client progress Record client progress, support outcomes, and any follow-up required.	☐ 2
Client shift report End-of-shift or during-shift report about support delivered and client presentation.	☒ 3 Always available on the staff app

Open the **Built-in templates** tab (1). **Client progress** has a switch (2). **Client shift report** is always available (3).

5 Check the form in the Staff App

In the Staff App, a support worker writes a report from one of their shifts.

- 1 The support worker opens the shift and chooses **Write report**.
- 2 In **Client**, they choose the client the report is about. The **What are you recording?** list stays empty and says **Choose a client first.** until a client is chosen.
- 3 They open **What are you recording?**. The forms you have switched on appear under **Reports**, next to the built-in report types. They choose the form and fill it in.

A support worker can write a report from the day of the shift. If the form is missing, check the **Staff mobile app** switch and the form's status in **Reports & Forms**.

Note: Forms are recorded against a client. On a shift that has no client linked, there is no **Client** list and only **Incident report** is offered, so your forms do not appear there.



What happens next

Support workers who write a report from one of their shifts in the Staff App now find the form in the **What are you recording?** list, under **Reports**, once they have chosen a client.

To stop offering the form in the Staff App, turn its **Staff mobile app** switch off. Reports that were already completed are not deleted. Managers can still add reports from the form on the **Reports** page.

If you unpublish or archive a form, it is no longer offered in the Staff App, even when its switch is still on. Publish it again to bring it back.

Important notes

Important: A built-in form is switched on for your organisation only. You do not need to duplicate it first, and turning its switch on does not change what other organisations see.

Good practice

- Switch on only the forms your team will really use, so the **What are you recording?** list stays short for support workers. Turn the switch off for a form nobody uses. Reports already written are kept.
- After you switch a form on, ask one support worker to open a current shift in the Staff App, choose the client and check that the form is listed under **Reports**, before you tell the whole team.
- Preview and publish a form before you switch it on. The switch decides who can use the form on a phone, and the form only appears once it is published.

Troubleshooting

The switch is greyed out.

Why it happens: There are three possible reasons. Your role can view report templates but not manage them. Or the form is **Client shift report** or **Incident report**, whose switch is always on. Or BondiByte is still saving another change.

What to do: For the first reason, ask an Owner or Admin to change the switch. For the second, nothing is needed, because those two forms are always available. For the third, wait a moment and try again.

I turned the switch on but staff cannot see the form in the Staff App.

Why it happens: The form must be published as well as switched on. A draft, an unpublished form or an archived form is not offered, even with its switch on.

What to do: Check that the **Status** says **Published**. If it does not, publish the form. Then ask the support worker to open the shift again, choose **Write report** and choose the client.

In the Staff App, the What are you recording? list is empty and says Choose a client first.

Why it happens: The list stays empty until the support worker chooses a client in **Client**.

What to do: Choose the client in **Client**. The list then shows the forms that are switched on.



The form is missing on a shift that has no client.

Why it happens: Forms are recorded against a client. On a shift with no client linked, only **Incident report** is offered.

What to do: Use a shift that has a client linked. A manager can also add the report on the **Reports** page of BondiByte.

A support worker cannot find **Write report** on a shift.

Why it happens: A report can be written from the day of the shift. For a shift dated in the future, the shift screen says **You can write a report once the shift has started**.

What to do: Ask the support worker to try again on the day of the shift. The **Write a report** button on the **Reports** page of the Staff App also lists the recent shifts they can report on.

I switched a form on by mistake.

Why it happens: The switch saves as soon as you choose it.

What to do: Choose the switch again to turn it off. A message confirms that the form is now hidden from the staff mobile app.

Need more help?

Guides: bondibbyterobotics.com.au/guides | Support: support@bondibbyterobotics.com.au

*Screens show a demonstration organisation with made-up names and may differ slightly as BondiByte is updated.
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