Phew!
AUDIT SYSTEM

Audit System

Respondent User Manual

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Introduction

The Audit System has been created by Phew to enhance your ability to complete an audit in a simple, less time-consuming manner. This is manual has been written for the respondents to assist in the completion of the audit. You should receive a link via email to alert you of your needed response for a new audit and the completion date.

Conventions used in this document

This manual uses icons to illustrate comments with the following purposes.

- Warning
- Best Practice
- Useful tips
- Navigate to

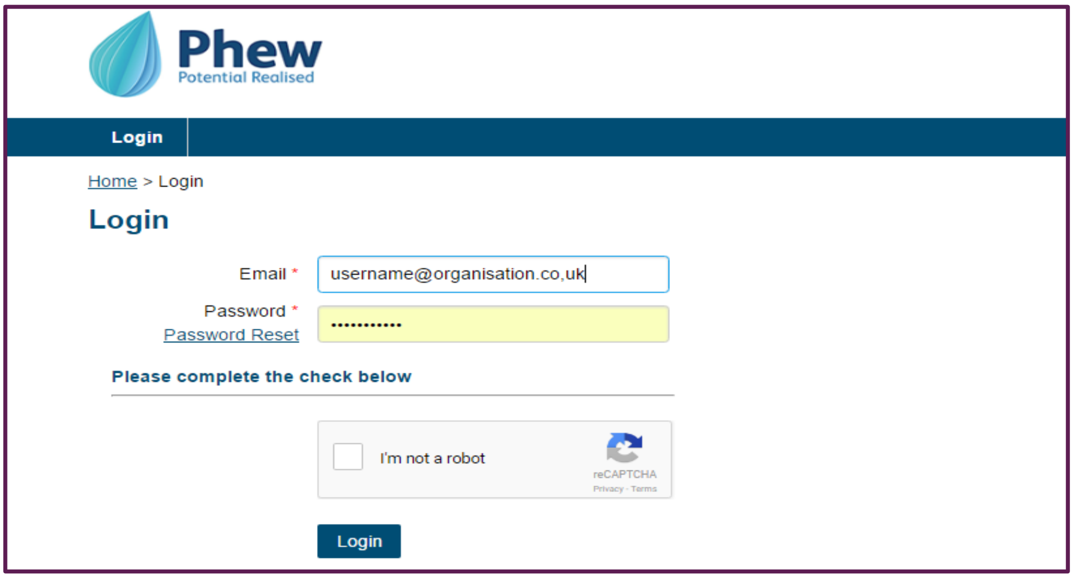
Objectives

This manual is designed to help you manage this system. It will cover:

- How to log in and out
- Navigating around the different pages of the site
- Responding to audits
- Reviewing audits
- Managing your team
- Assigning team members to audits

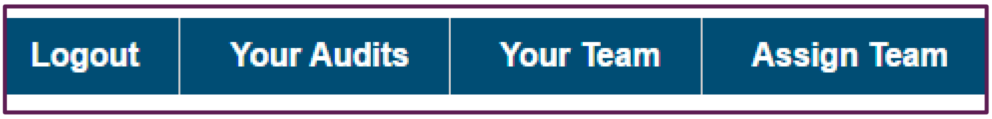
This system is not compatible with Internet Explorer 7 (IE7) or below.

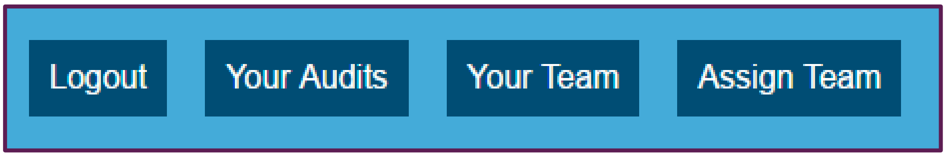
Logging In



To login please follow the email link sent to you and enter a password. From then on you can login using your email address and the password you set. If you do not know your login details or were never sent an initial email., please contact the Board.

Navigation





Once you have logged in, you will be taken directly to the Your Audits page. You can use the blue navigation bar at the top of the screen to move between different pages, or the blue buttons in the footer.

You can log out at any point by using the Logout button in the top navigation bar or the Logout button in the footer.

Your Audits

Current Audits

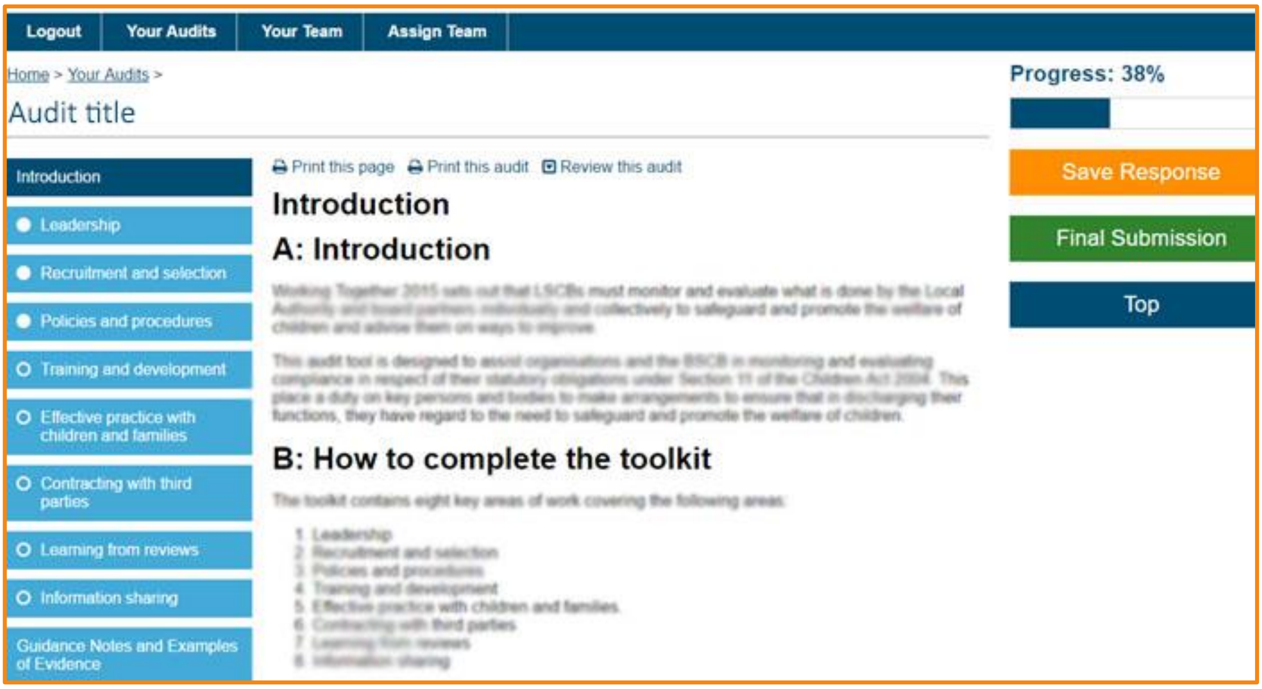
Title	Due	% Complete	Action Plan	Submitted	Respond
Phew Test Section 175 Audit - 2018	30-11-2019	100		No	Submission deadline passed.
Phew Test Demonstration Audit	31-12-2018	0		No	
Phew Test Training Example 2019	30-04-2019	0		No	

Submitted Audits

Title	Due	% Complete	Submitted	Action Plan	Review
Example Audit	26-08-2016	100	Yes		
Example Audit (Respond to)	01-02-2018	100	Yes		
NM test Audit	18-08-2016	100	Yes		

This page is where you will be able to view your current audits that you need to complete as well as already submitted ones.

Respond to an Audit



To respond to an audit that you have been assigned, click the pencil to the right hand side of that audit. From here you can go into each section and answer the questions.

The first page you will be directed to is the Introduction page. Often this is where the supplier of the audit will include a summary of the audit and descriptions including examples of evidence and what ratings mean. Ratings can either be 1-5, Red Amber Green, or 0-3.

To the right-hand side you will see a progress bar that will show you how far you are through completing the audit. Below this are three buttons; the Save Response button saves whatever information you have put in up to that point, the Final Submission button is for when you have completed every single question and are ready to submit your response, the blue Top button will take you back to the top of the current page you are on.

⚠ Once you submit the audit you cannot make any further changes.

The audit will be broken down into manageable sections for ease of use, which you can navigate between using the left-hand side blue buttons. Once a section has been completed you will notice the bullet next to the text becomes filled in, indicating a completed section.

At the top of the screen you will also see three additional options; Print this page, Print this audit and Review this audit.

- Print this page

  This will bring up a print preview of the current page that you are on. If any responses have been saved in the section you are viewing, these will show in the print preview.

- Print this audit

  This will bring up a print preview of the entire audit. If any responses have been saved in the section you are viewing, these will show in the print preview. If any responses have been saved in any sections these will show in the print preview.

- Review this audit

  This button will bring up the entire audit on the screen you are on, meaning you will be able to view the whole audit in one hit by scrolling down rather than clicking into each section.

These options, along with the progress bar and the right-hand side questions, will be available on every audit response page.

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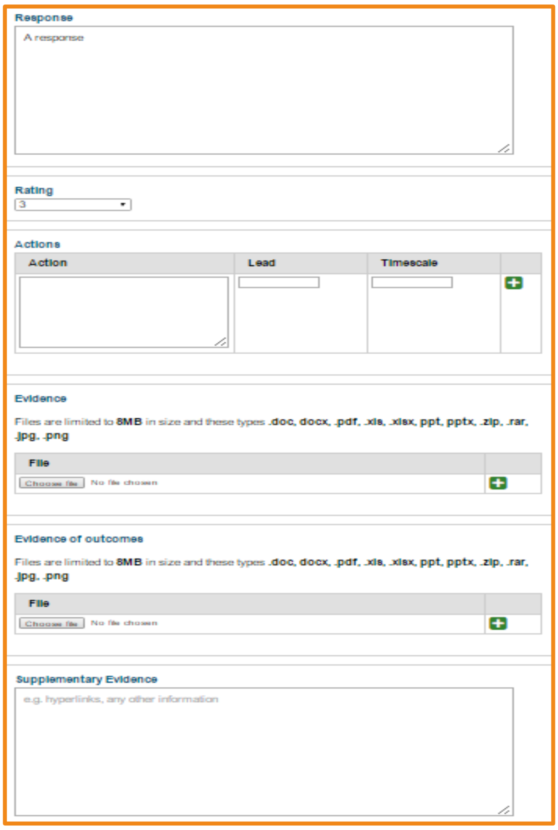
Question Responses



Once you have read the introduction and description information, you will be able to begin answering the questions.

For each question, you will be asked to supply a response, this could be a rating, an action, evidence, evidence of outcomes and supplementary evidence and or a combination this depending on how the question was set up.

You may not always be required to provide evidence, but as much information as possible is always helpful.

When you add Evidence, or an action remember to click the button to add it to your response.

In the Actions section you will be asked to insert a Lead and Timescale.

The lead is the lead contact responsible for this action and the timescale is when you are aiming to complete this action by.

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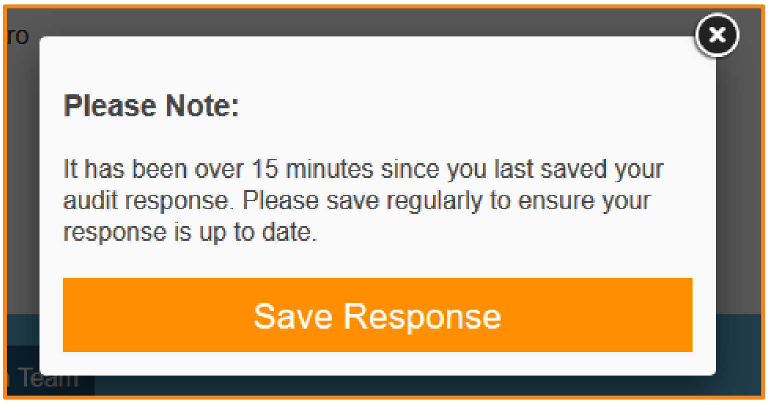
At the bottom of each question you will see a check box for you tick once you have completed that question.

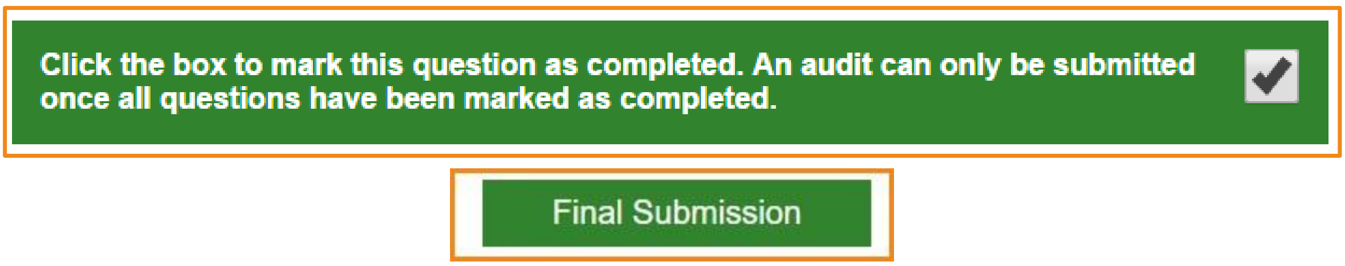
Once you have completed a question, tick the check box then click the Save Response button.

To ensure that your response is kept up-to-date and to prevent any loss of work and or answers, a pop-up will appear after 15 minutes of inactivity encouraging you to save your work.



The system will only automatically time-out after three hours of inactivity; if you log off, shut down your computer or leave your workstation and return within three hours you will be able to pick up where you left off without having to log back in again.

Submitting an Audit



For the audit to be completed, all these check boxes need to be ticked, ensuring all questions are fully answered.

Then you will need to select the Final Submission if all sections and questions are completed your Audit will be submitted.

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Review an Audit

Title	Due	% Complete	Submitted	Action Plan	Review
Example Audit	26-08-2016	100	Yes		

To review a submitted audit, click the preview to the right-hand side of that audit.

You will then be directed to a new page showing every question, your response, your rating and any actions or evidence you entered (if any).

You will again notice a print icon at the top of the page which when clicked on will load a print preview of the audit review.

To view the audit's Action Plans simply click the preview icon underneath the Action Plan heading. You will then be taken to a page detailing all the action plans for that audit, the lead contact for each action, the timescale and space to fill out the outcome, status and completed date. Above the table you will see three options to either print this plan, download it as an excel spreadsheet or download it as a PDF.

Logout | Your Audits | Your Team | Assign Team

Home > Your Audits > Example Audit Action Plan

Example Audit

Print this page   Download CSV   Download PDF

Action	Lead	Timescale	Outcome	Status	Completed Dates
Incorporate into the new behaviour policy	nick	03-03-2017			

Your Team

Add Team Member

Last Name	First Name	Phone	Leader	Edit	Delete
Burgess	Matthew	01234 666999	Yes		

On this page will be all the members assigned from your organisation. You can edit or delete the different team members by using the Edit and Delete buttons, or you can add a new person by clicking the Add Team Member button at the top. When adding a team member here, you will be asked to create a password for them, as well as mark if they are a Leader or not. You are then responsible for informing the new contact that they have been added to the system and what their login details are (this will be their email address and the password that you have just set up).

Assign Team

Title	Due	% Complete	Assign
Example Audit	30-09-2016	38	
Example Audit	26-08-2016	0	

Last Name	First Name	Assigned
Burgess	Matthew	☐
Tate	Andrew	☑

Assign Team

This page allows you to assign certain members of your team to certain audits. By clicking the Assign button next to the audit, you wish to assign someone to, a box will appear at the top of the page with the different team members that are able to be assigned to it. Since Leaders are automatically notified about all audits, their name will not be visible here.

To select the team member, simply tick the small grey box in the Assigned and then click the Assign Team at the bottom. You also have the option to un-tick names here for team members you no longer want assigned to an audit.
It is then your responsibility to notify the individual that they have been assigned this audit, for example by sending them an email with link to the audit and an explanation about why they have been assigned it and when you would like them to complete it by. The link will be something like:
https://*exampleorganisation*.onlineaudits.org.uk/login.

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Document Control

This document is maintained as an electronic document.

Document information

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Revision history

System Version	Revision No.	Date	Summary of changes	Revision marks
Ver 2	1.0	Nov 2016	Updated	
Ver 3		Apr 2020	Complete review of the manual and structure and update to mark new features.	
Ver 3.01		May 2020	Minor typo's	

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