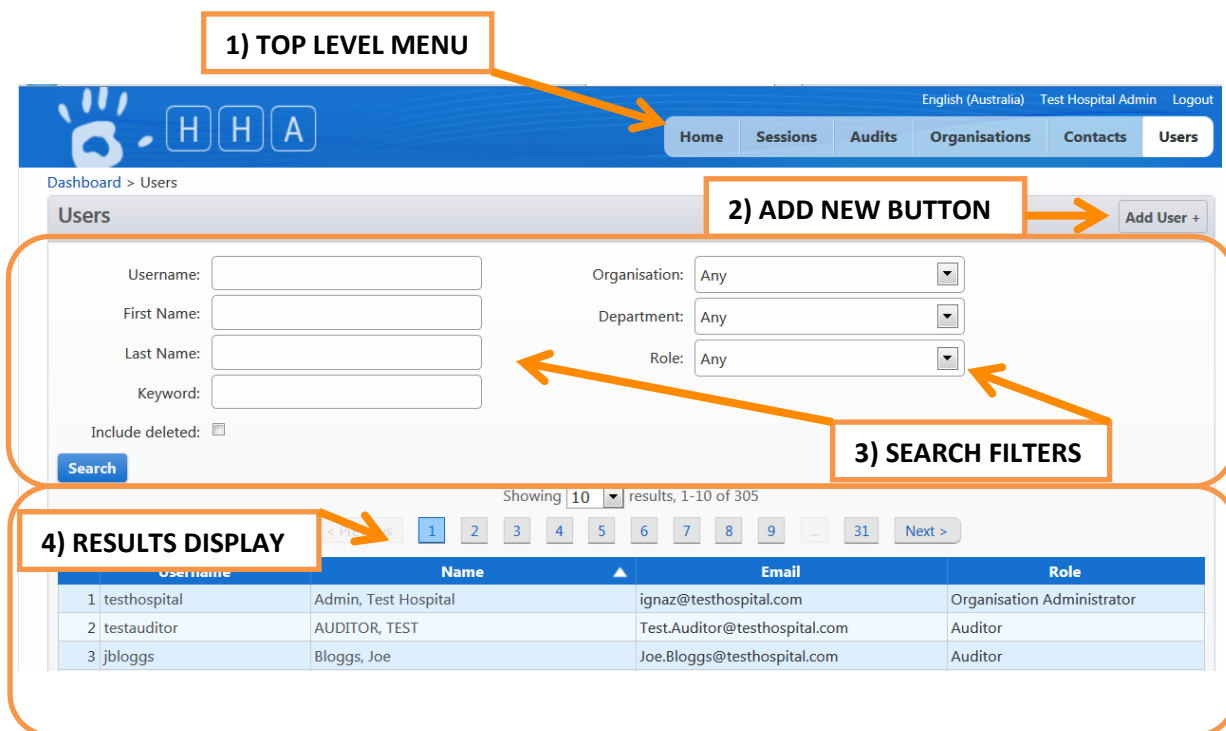


How to Create New Audits and Create New Local Audit Periods

Scope: Organisation Administrators, Region Administrators, Organisation Group Administrators

Screen overview -



The screenshot shows the 'Users' management page in the HHA system. Annotations highlight key features:

- 1) TOP LEVEL MENU:** Points to the navigation bar containing 'Home', 'Sessions', 'Audits', 'Organisations', 'Contacts', and 'Users'.
- 2) ADD NEW BUTTON:** Points to the 'Add User +' button in the top right corner.
- 3) SEARCH FILTERS:** Points to the search filters including Username, First Name, Last Name, Keyword, Organisation, Department, and Role.
- 4) RESULTS DISPLAY:** Points to the table displaying user records.

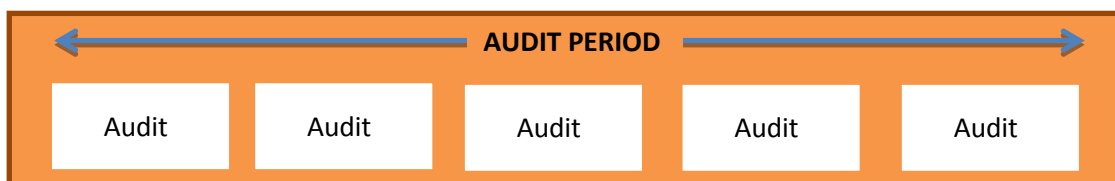
Username	Name	Email	Role
1 testhospital	Admin, Test Hospital	ignaz@testhospital.com	Organisation Administrator
2 testauditor	AUDITOR, TEST	Test.Auditor@testhospital.com	Auditor
3 jbloggs	Bloggs, Joe	Joe.Bloggs@testhospital.com	Auditor

Audits and Audit Periods

An **Audit Period** is simply a defined date range. Organisations are then required to create **Audits** to collect moments against. The moments collected against an audit are reported as belonging to the audit period which the audit belongs to.

The National Audit Periods are defined and added to the HHCApp by the body responsible for your national program. Moments collected against an Audit for a national Audit Period are reported as part of the national program

Organisations can also define their own Local Audit Periods (see Adding a [Local Audit Period](#) below) which they can create audits for. Moments collected against a local audit **are not** included as part of the national program



Accessing the Audits Page

>Login to HHCApp

There are 2 ways to access the Audits Page

- 1) To view and access all audits for the organisation(s) that you are an administrator for.

>Click the Audits button in the top level menu



OR

- 2) To view and access audits for a single organisation only

>Click the Organisations button in the top level menu

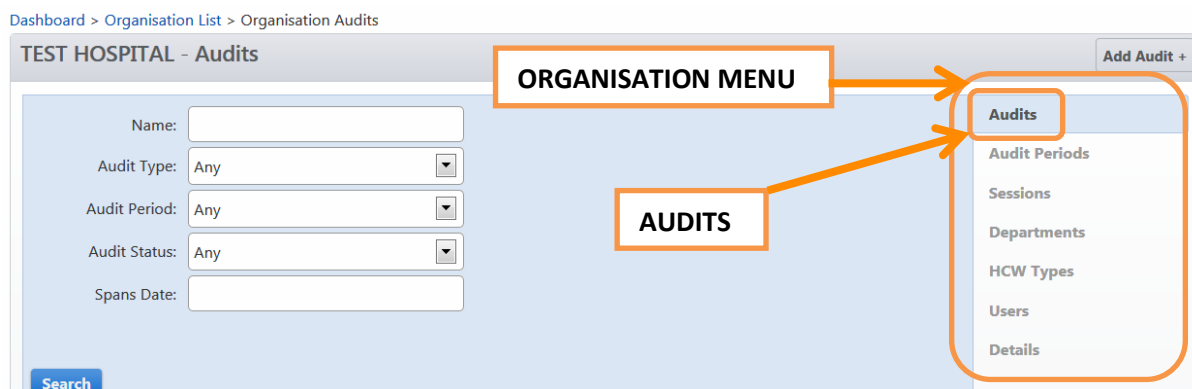


>Click an organisation's name to select it.



This will take you to the Organisation Administration screen

>Click Audits from the Organisation Menu if not already selected.



Both methods will take you to the Audits page where you will see a list of Audits for the selected organisation(s).

Nb. You can use the search filters to narrow down the list of audits if you are searching for an audit that has already been created for an organisation.

Audits
Add Audit +

Name:

Audit Type:

Audit Period:

Audit Status:

Spans Date:

Organisation:

Showing results, 1-10 of 12

< Previous 1 2 Next >

	Name	Start Date	End Date	Status	Sessions	Organisation
1	NHHI Audit One 2013	01/11/2012	31/03/2013	Active	2/11	TEST HOSPITAL
2	Spot Audits 2012	01/07/2012	31/12/2012	Pending Approval	1/1	TEST HOSPITAL

To Add an Audit to a National Audit Period for an Organisation

>Click Add Audit +

Audits
Add Audit +

>Select the Audit Type, Organisation and Audit Period

The Name, Start Date and End Date fields will be automatically completed.

Add Audit

Audit Type:

Organisation: *

Audit Period: *

Name: *

Start Date: *

End Date: *

Save

Cancel

Warning - Whilst it is possible to make the audit name different to the National Audit Period name, this may cause confusion for your auditors looking for the standard national audit period name. All communication from the national office will refer to the Audit Period name as defined by the national office. Any changes to the audit period name will need to be communicated at a local level.

>Click Save

You will be returned to the Audits page where you will see that the new audit has been added to the results display.

The Audit is now available to have sessions added to it.

Local Audit Period

As mentioned previously, organisations can create Local Audit Periods for audits that an organisation does not want included as part of a national program.

Defining a Local Audit Period

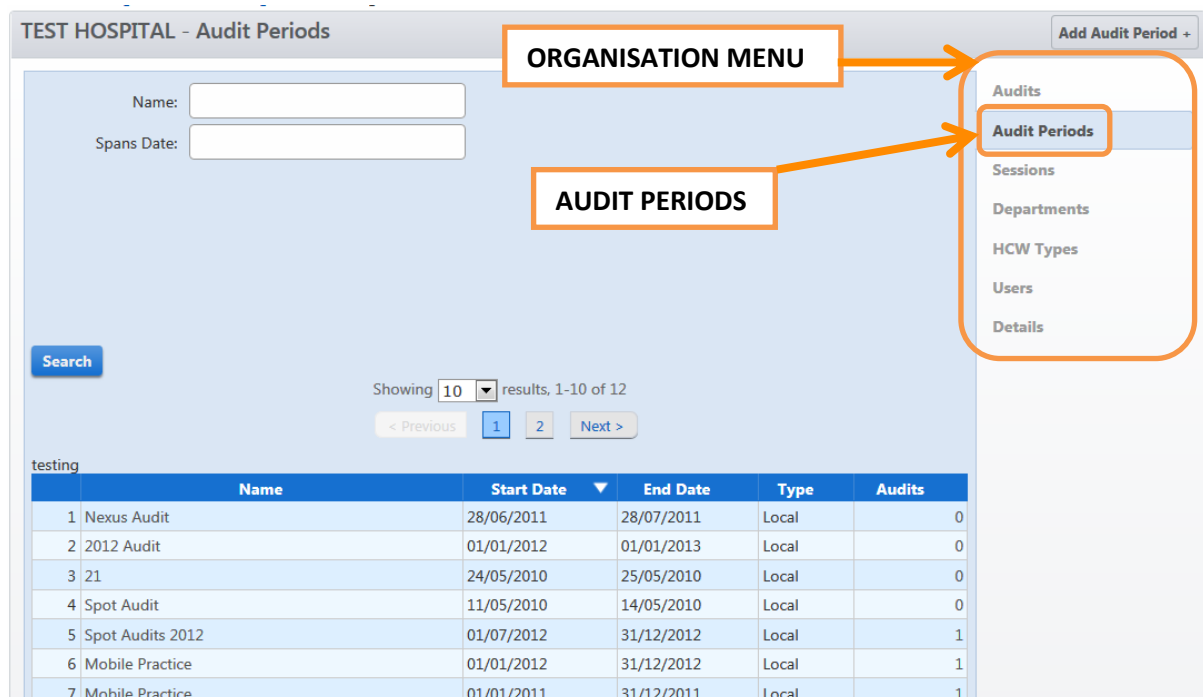
>Click the Organisations button in the top level menu



>Click an organisation's name to select it.



>Click Audit Periods in the Organisation Menu.



The screenshot shows the 'TEST HOSPITAL - Audit Periods' page. It has a search form with 'Name' and 'Spans Date' fields and a 'Search' button. Below the search form is a table with the following data:

Name	Start Date	End Date	Type	Audits
1 Nexus Audit	28/06/2011	28/07/2011	Local	0
2 2012 Audit	01/01/2012	01/01/2013	Local	0
3 21	24/05/2010	25/05/2010	Local	0
4 Spot Audit	11/05/2010	14/05/2010	Local	0
5 Spot Audits 2012	01/07/2012	31/12/2012	Local	1
6 Mobile Practice	01/01/2012	31/12/2012	Local	1
7 Mobile Practice	01/01/2011	31/12/2011	Local	1

Annotations in the image include:

- ORGANISATION MENU**: A box pointing to the right-hand side menu.
- AUDIT PERIODS**: A box pointing to the 'Audit Periods' item in the right-hand side menu.

The right-hand side menu contains the following items: Audits, **Audit Periods** (highlighted), Sessions, Departments, HCW Types, Users, and Details.

>Click Add Audit Period +

TEST HOSPITAL - Audit Periods Add Audit Period +

Add Audit Period to TEST HOSPITAL

Name: *

Start Date: *

End Date: *

>Enter a Name, Start Date and End Date

>Click Save

The new audit period will be added to the list of Audit Periods for the organisation.

	Name	Start Date	End Date	Type	Audits
1	Local 2012 Audit	01/01/2012	31/12/2012	Local	0

Changing the Dates of a Local Audit Period

There may be occasions when an organisation needs to change the dates of a Local Audit Period. This can be done by the administrator with access to the organisation

>Click the Organisations button in the top level menu



English Australia Test Hospital Admin Logout

Home Sessions Audits **Organisations** Contacts Users

>Click an organisation's name to select it.

Organisations

Code:

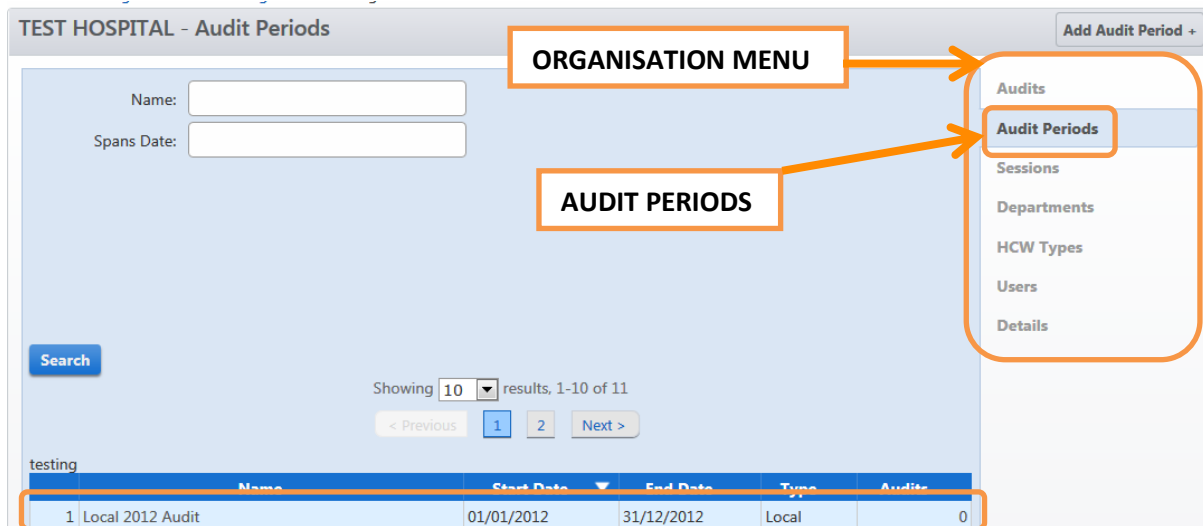
Name:

Total results: 1

Code	Name	Type	Dents	Beds	Parent
1 TEST-HOSP	TEST HOSPITAL	Public	12	100	Australian Capital Territory

>Click Audit Periods in the Organisation Menu.

>Click the name of the Audit Period that needs to be changed to select it.



TEST HOSPITAL - Audit Periods

Name:
Spans Date:

Search

Showing 10 results, 1-10 of 11

< Previous 1 2 Next >

	Name	Start Date	End Date	Type	Audits
1	Local 2012 Audit	01/01/2012	31/12/2012	Local	0

>Enter the new date

Add Audit Period to TEST HOSPITAL

Name:

Start Date:

End Date:

>Click Save

	Name	Start Date	End Date	Type	Audits
1	Local 2012 Audit	01/01/2012	31/01/2013	Local	0

Remember, this has just changed the Audit Period dates though. Any audits that have been created for the Audit Period will still have the previous date.

You will therefore need to either:

- 1) Change the end date of the audit via the Organisations Audit page; or
- 2) Add a new audit to the audit period. This will not affect reporting as the reports use the Audit Period not the Audit to group moments.



TEST HOSPITAL - Audits

Add Audit +

Name:

Audit Type: Any

Audit Period: Any

Audit Status: Any

Spans Date:

Search

Showing 10 results, 1-10 of 13

< Previous 1 2 Next >

	Name	Start Date	End Date	Status	Sessions
1	Local 2012 Audit	01/01/2012	31/12/2012	Active	0/0

Audits

Audit Periods

Sessions

Departments

HCW Types

Users

Details