

## PRMS generating an audit reporting template

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1. From the 'for audit' in-basket, click on the audit case you wish to generate an audit reporting template for.
2. Go to the middle column, properties fields, and complete as much information as you can. Note that, at a minimum, you must enter:
  - a. the audit type
  - b. the proposed audit dates
  - c. the lead auditor's name (name must match the name in the auditor register)
  - d. the peer reviewer's name (name must match the name in the auditor register)
  - e. select 'no' for final audit report ready to be submitted.
3. Push 'save' (top right hand button).
4. Push 'generate template' button.
5. Whilst the audit report is being generated, the PRMS takes you back to the audit in-basket.
6. Click on the time queued title to refresh the page ensuring you are sorting by the most recent time (push the button again if you have descending times rather than ascending).
7. Click back into the audit case.
8. Open the folder on the left hand side of the screen called 'pre-propagated audit tools'.
9. A file will then be available to download and send on to the audit team.

### Other helpful info:

- You may withdraw an audit case rather than processing it. Make sure you put a comment into the comments area (button, top left hand side of the screen) as to the reason why the case is being withdrawn (for example, your DAA is no longer contracted to provide that audit, or the audit is going to be combined with another audit).
- If the audit reporting template is not generated, check the history in the case to see what the error is. This is most commonly because the spelling of auditor names are incorrect.
- An audit case will always start with the full list of related premises listed in the case. If you are sampling please remove those premises not being visited from the list before generating the audit tool.
- If there are any inconsistencies with premises in the list or the names of the premises please contact the Ministry, rather than change the data directly. Making changes directly to the case can cause errors, and it is important that the main database is updated.