

## PRMS Adding a new auditor

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1. From the auditor group case (your DAA) go to the 'tasks' tab on the left hand side of the page
2. Select 'add' and this will bring up a pop-up window with two drop downs visible.
  - a. Leave the first drop down (create new auditor)
  - b. Put the auditor name into the second drop down
  - c. Push OK (bottom left hand side of the pop-up window)
3. This brings you to a largely white screen. Look to the top right hand side of the screen and push the add button (or cancel if you have made an error)
4. This will take you back to the auditor group case. Close this case (top right hand side of the page).
5. Go to the in-basket from the work tab of the PRMS and open the new auditor case.
6. Complete the properties fields for the new auditor, including:
  - a. make sure you add the name exactly as you want it displayed in audits, as you will be entering it into the properties fields for audit cases
  - b. select the type of auditor by clicking on the little arrow to the right hand side of the field 'type of auditor' then add from the pop-up box the relevant details (e.g. Lead Auditor, Peer Reviewer, Technical Expert). An auditor may have more than one type
  - c. enter the auditor's audit qualifications:
    - i. if not relevant (e.g. a technical expert) put 'Not applicable'
    - ii. add in qualifications in a standardised way (i.e. NZQA8086, NZQA8084)
  - d. enter the auditors professional qualifications
    - i. if not relevant (e.g. a consumer auditor) put 'Not applicable'
    - ii. add in qualifications in a standardised way (i.e. RN, BSc). Only enter in qualifications recognised by NZQA. Other qualifications can be included in a CV and added to the case, if you wish, by using the add document function in the PRMS
  - e. enter the years of auditing practice (make sure this is consistent with the CV held by your DAA). If not relevant (e.g. a technical expert) put 0
  - f. enter in the auditors auditing practice scope and experience details
    - i. Add the practice scope as one or more of the following:
      - Aged Residential Care
      - Residential Disability – psychiatric
      - Residential Disability – physical

- Residential Disability – intellectual
  - Residential Disability – sensory
  - Hospital Services – medical
  - Hospital Services – surgical
  - Hospital Services – maternity
  - Hospital Services – paediatric
  - Hospital Services – general (i.e. not specifically one of the above and/or quality, organisational management etc.)
  - Consumer Auditor
  - Technical Expert
- ii. do not enter in experience details as this will become outdated quickly
- g. if Auditor in Current Clinical Practice is selected as yes, you must enter in the auditor’s annual practising certificate / registration number under the HPI-CPN Number field and enter the auditor’s Current Clinical Practice Details. Current Clinical Practice Details should state the place of work, role and FTE. For example: XXX Rest Home, RN, 0.2 FTE.
- h. for all people entered into the auditor register, you must put in a comment about recent clinical professional development - take a standardised approach (i.e. what study days or conferences and total hours in the last year):
- i. if the auditor is clinical – put in clinical professional development
  - ii. if the auditor is not-clinical – put in other professional development
  - iii. if a technical expert – put in clinical professional development
- i. complete the audit review and assessment requirements:
- i. choose ‘yes’ for orientation completed. If the orientation hasn’t been completed choose ‘no’ and then save the file (top right hand side of the page) until you can put in ‘yes’
  - ii. add the date that the initial witnessed audit was completed.
7. Once all properties have been completed, push the top right hand button that says ‘create auditor’.

### Other helpful info:

- Try to make sure the information you enter in for an auditor is accurate – ask the auditor to complete information in writing for you to enter in so that it is consistent with other entries that may be in the PRMS, particularly where an auditor works for more than one DAA.
- You do not need to add technical expert assessors (TEAs) (DHB audits where TEAs are assigned to the audit by the Ministry) into the auditor register but you do need to add in technical experts that you use.
- You can push save and close and come back to the case later if you do not have all relevant information available to you. The case will stay in your in-basket until you have pushed the create auditor button.

- Update the recent clinical professional development field when you update the date of the last witnessed audit and last performance review date.
- Note that the auditor will not show as active on your register unless they have completed their orientation.
- Add a CV through the add documents function to the left hand side of the case, especially if the auditor intends auditing DHBs or is a lead auditor.