

PRMS merging audit reports

Note: audit reports can also be merged using the off-line tool available on the HealthCERT website.

1. Once you have received audit reporting templates back from auditors, label these audit reports in the order you wish to have them merged and save them to your computer. The labelling convention needs to be:
 - a. 01 [filename].docm for the first report
 - b. 02 [filename].docm for the second report
 - c. And so on, up to a total of 18.
2. Click on the audit case from the audits in-basket.
3. Add each document into the 'TobeMerged' folder on the left hand side of the audit case. Make sure when adding the documents that each is added using the 'audit partial report' document type (drop down box in the add document pop-up window).
4. Once you have added all the documents, push the 'merged audit reports' button on the top right hand side of the page.
5. Whilst the reports are merging the PRMS will take you back to the audits in-basket.
6. Open the audit case.
7. Open the folder 'MergedReport' folder.
8. The merged audit report file will then be available to download and send on to the audit team or lead auditor for review. Once the review is finished you can upload the final report as normal.

Other helpful info:

- If you have a document review in multiple templates when you merge them they will duplicate the information. Either use a separate template for the document review or have it in the lead auditor template only to avoid duplication.
- Before merging the audit reports, double check the properties fields in the middle column of the PRMS case because you can update this information at this time.
- A maximum of 18 reports can be merged.