VIRTUAL COLLEGE

Health & Social Care Division

E>nable Audit

How to complete an audit

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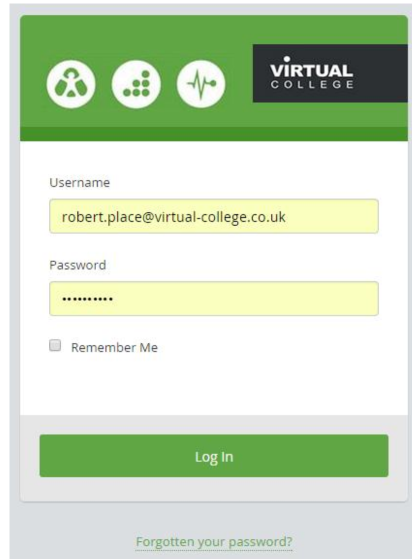
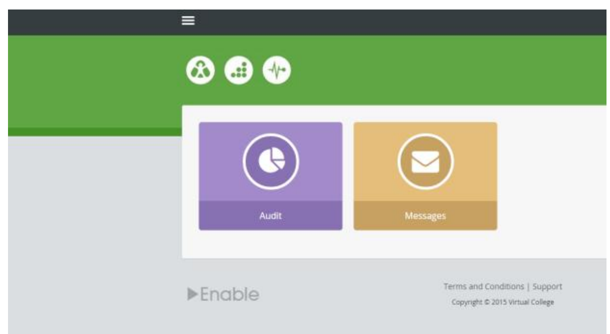
Getting started



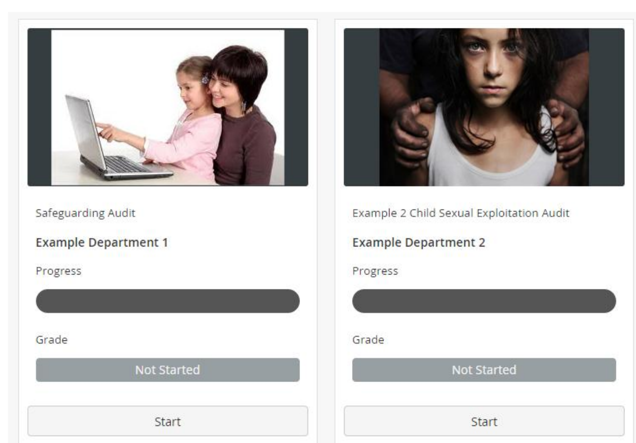
You will have already had your log in details emailed to you when you were set up on the system.

If you have forgotten your password please use the ‘Forgotten you password?’ button underneath the Log In page.

Welcome to your Audit Dashboard



You are automatically shown the ‘audit’ dashboard which will allow you to complete any audits you have to do.

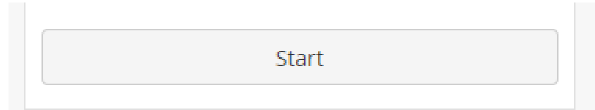


To get started on your audit(s) please select the purple ‘Audit’ icon.

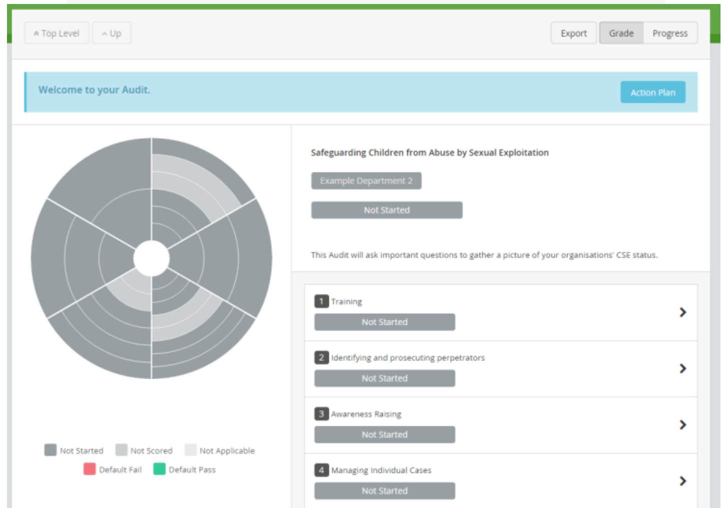
Here you will see the audit(s) available to start. You will always be given a progress bar showing how much of the audit you have completed.

The main page of an audit

Once you select the audit you wish to explore please click on the ‘start’ icon.



If this is your first attempt at completing an audit you will see a blank template ready for you to start work.



PLEASE NOTE: You can stop and start at any time and all your progress will be stored.

Let’s explore this page.

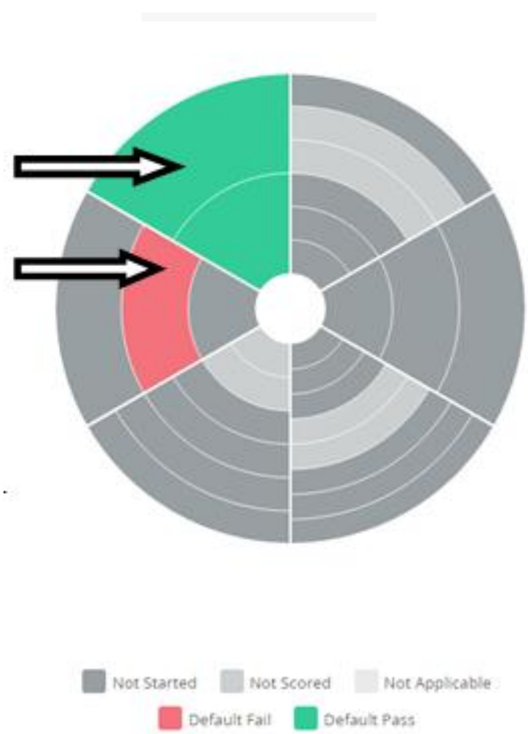
Navigation

The system will automatically default to show you the ‘grade’ your audit is achieving. To change this view to view your ‘progress’ (how much of the audit you have started and completed) please change this using the icons in the top right hand corner.

The Chart (or ‘pie’) will always show a visual colourised display of your Audit score.

Each ‘slice’ of the pie relates to a top level category or question.

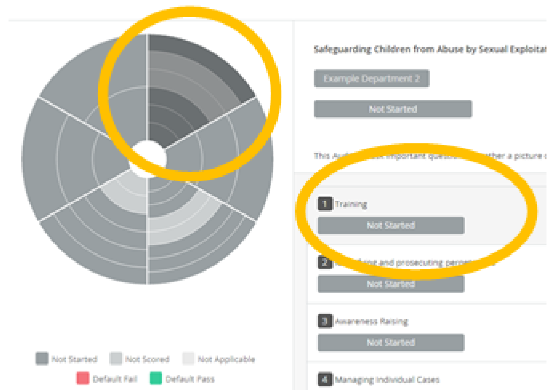
Each ‘segment’ within relates to a sub-category or a question relating to that top category.



The purpose of the pie will become more apparent as you start working through your audit. As you start answering questions you will receive a colour relating to your responses. These will appear on the pie.

Using the key you'll be able to quickly isolate areas for improvement in addition to having a quick viual represenation of your whole audit.

You will notice that as you hover over elements of the chart you will see information it relates to reflected on the table. This allows you to navigate through your audit using either of the two options in tandem

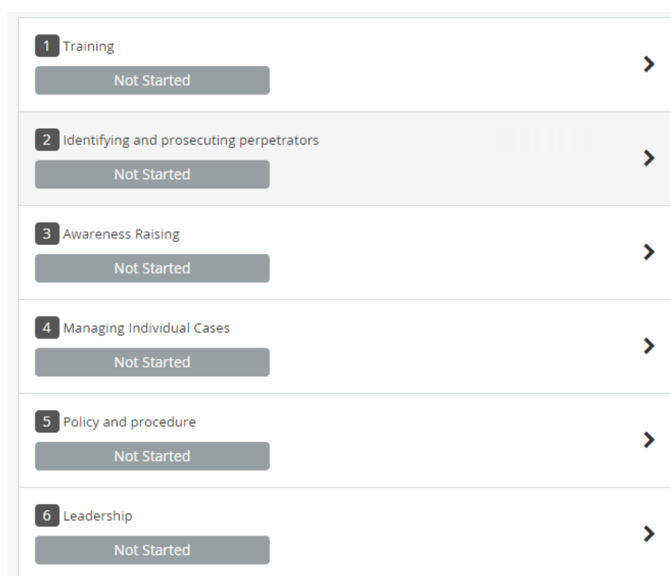


The Table

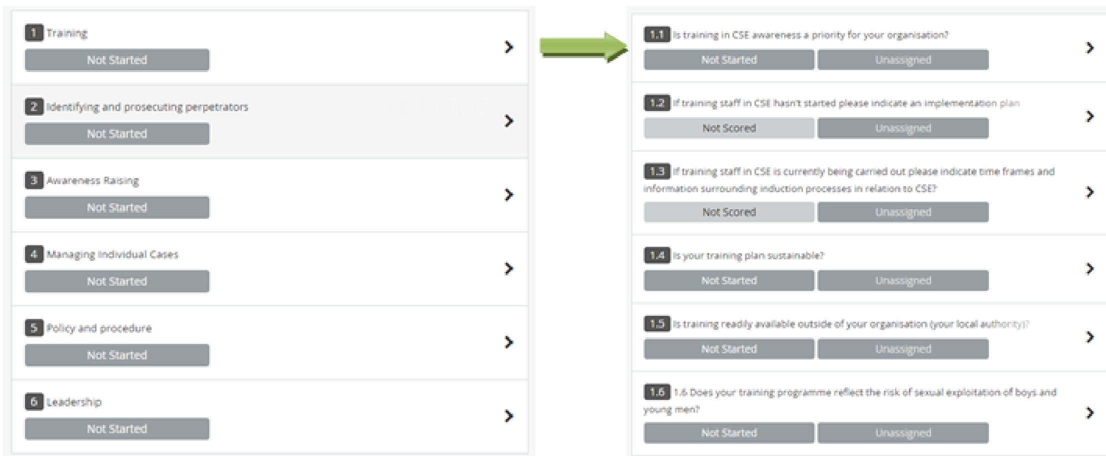
The table relates directly to the pie and shows similar information.

Each part of the table represents a category or question.

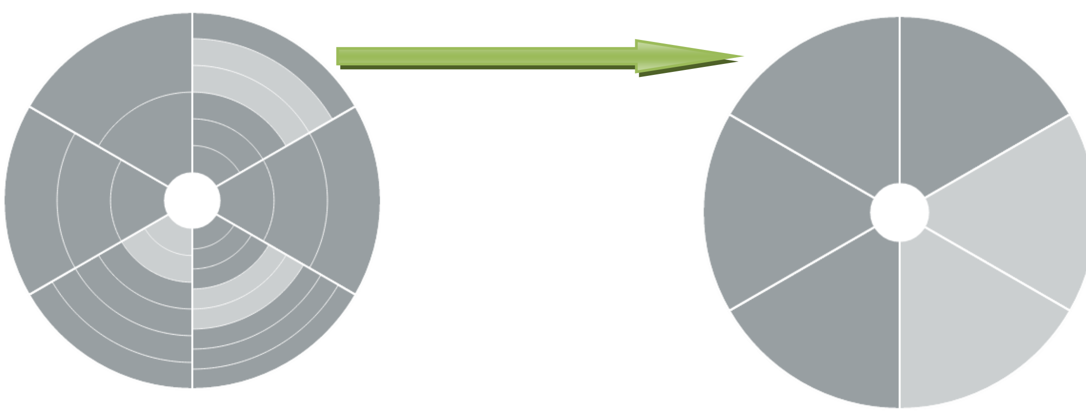
By selecting a question you'll be able to answer the question



By selecting a category you'll be brought to a similar table outlining the questions within and any further sub-categories; please find an example below:



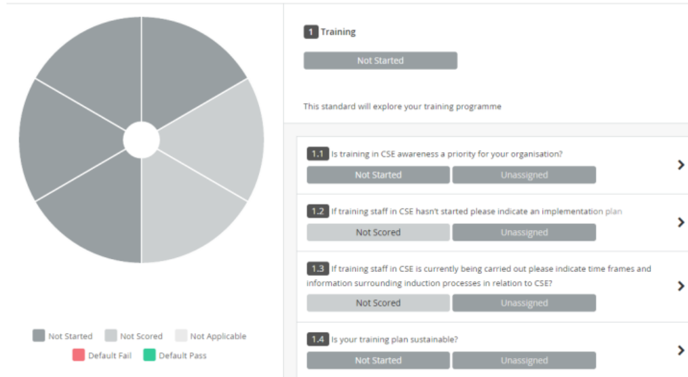
This principle also applies to the chart :



Getting Started

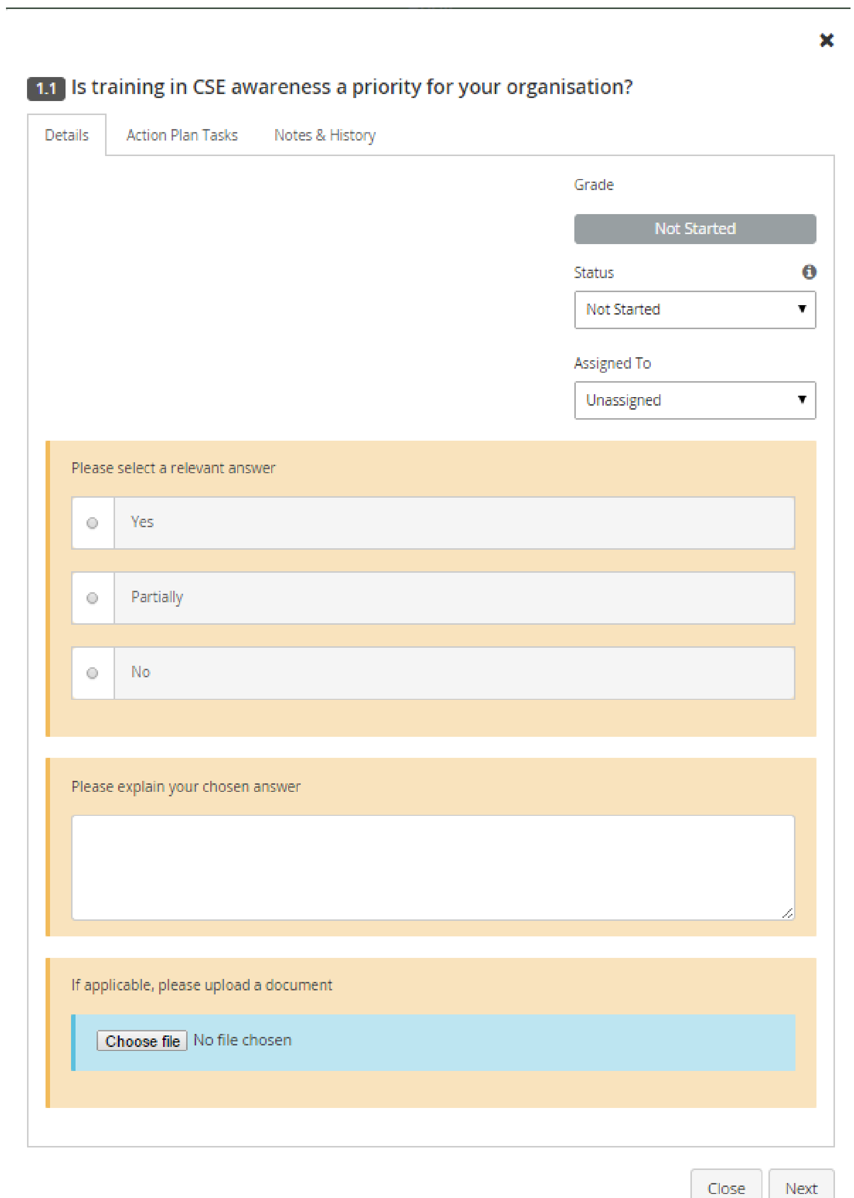
Let's get started with completing your audit and where better than the beginning.

Selecting the first category from either the Table or the Chart view will bring up the questions to be answers.



Select your first question and a new box will pop up which will allow you to answer your question.

The appearance of this page will differ depending on the type of question.

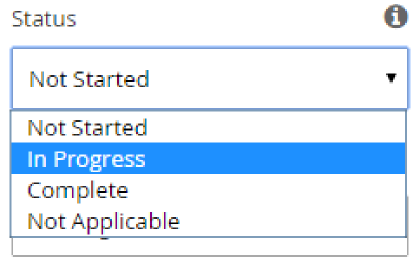


Details:

This is where you can answer the question.

You will receive a range of responses which your auditor wishes to evaluate.

The status of an audit will always appear as 'Not Started'.



Once you have answered the question this changes automatically to 'In progress'.

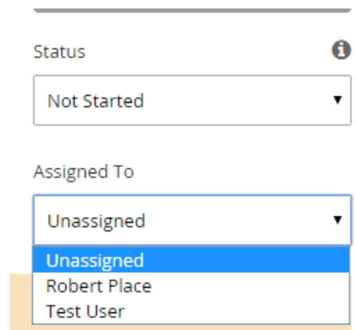
You can select 'Complete' to show you have answered this question to the best of your ability.

Not applicable can be used for questions which do not apply to you or your organisation. Should you select this you won't be penalized for not completing this question.

Status relates to your progress percentage.

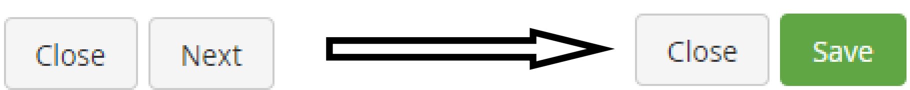
In Progress - 50% complete

Complete – 100% complete

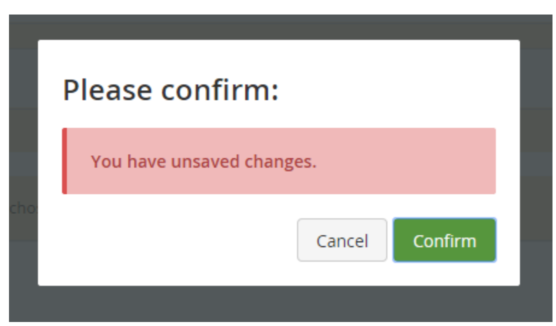


You can assign a question to someone who is also completing the audit. They will receive notification of this.

When you input your answers you'll notice the 'Next' icon in the bottom right of the box will change to 'save'. Once you are happy with your responses, simply select 'save' and you'll be able to continue to the next question.



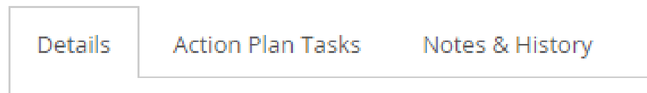
Should you accidentally click outside of the question box you'll receive a warning message to make sure you save any information you have entered.



Action Plan Tasks

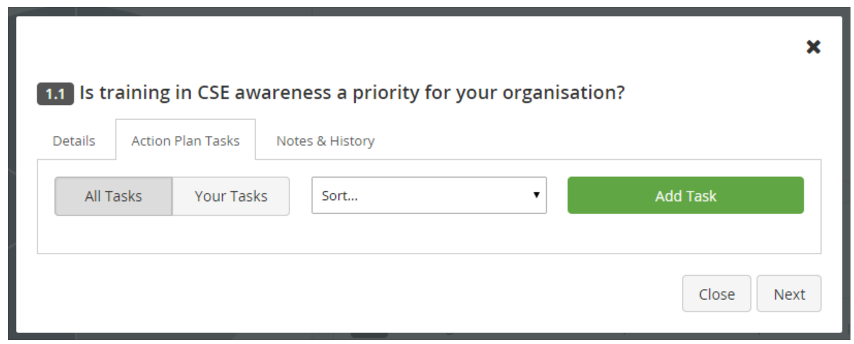
Should it be required it is easy to add an action plan to a question in your audit.

Simply select Action Plan Tasks at the top of any question you are currently viewing.



Here you will be able to view your action plans.

The first time you select this option you will see this image:

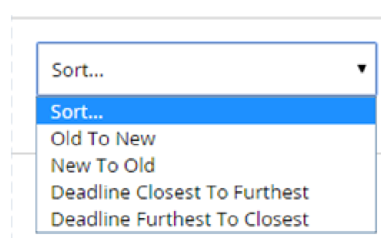


NB: Some audits may have triggered action plans which will the automatically given to you in relation to your audit grade. For example; should you select a score of 2 out of 3 you may automatically be given an action plan which explains how to achieve a score of 3.

Filtering features:

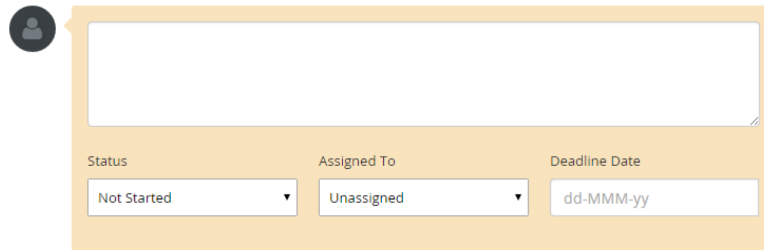
The system will always show all the action plans but should you be completing the audit with other individuals and you wish to see only your actions please select 'Your tasks'.

Selecting the 'Sort...' filter you'll be able to filter the actions in a variety of ways which suit you.

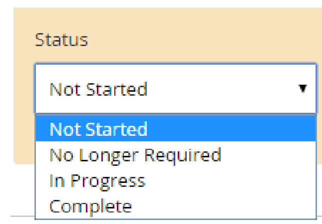


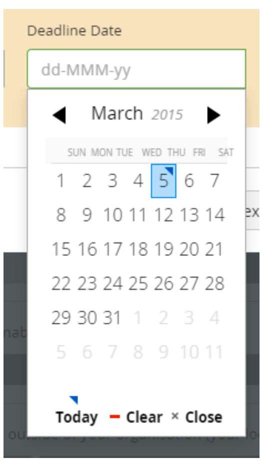
To add a new action plan select 

In the large text box you'll be able to add any details of the actions you wish to add. Please be as descriptive as possible.



The status of the action is always 'Not started'. You can change this at any time to the items listed on the drop-down list.

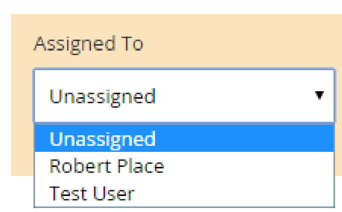




The deadline date will allow you to tell your auditor when you plan to have this action completed. This date will appear on any report produced.

Should the deadline date move or become redundant you'll be able to change or remove this date.

You can assign an action to anyone who is registered in the audit system and assigned the same audit. Should you wish you can leave an action unassigned.



If you assign an audit to someone they will receive a notification within the system and by email.

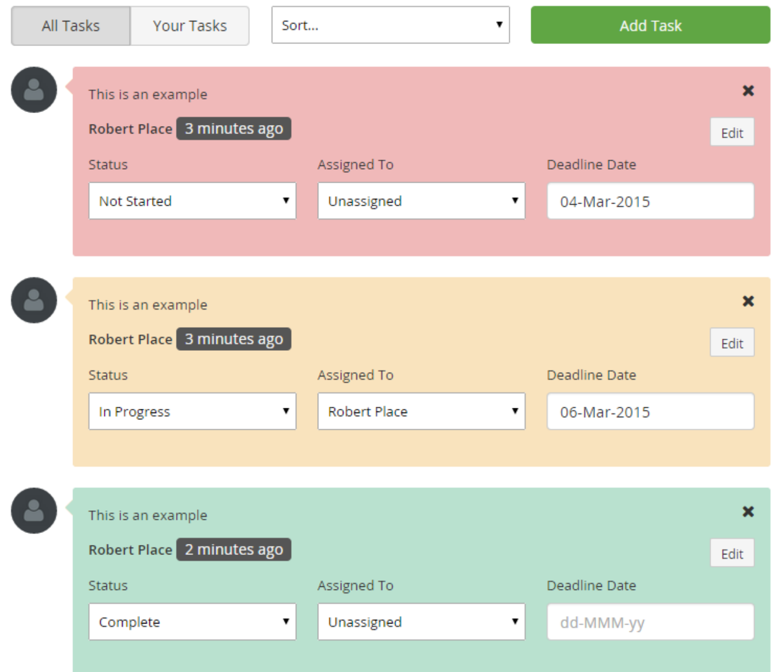
For all subsequent action plans follow the process above and save the new action by selecting the  icon at the bottom of the box.

As you start populating your action plans and complete your audit you'll see some colourised changes.

Red: overdue action plans

Yellow: action plans in progress

Green: completed actions



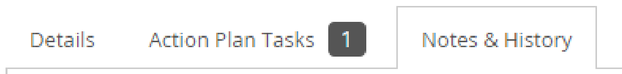
To edit the text of an action select the 

icon.

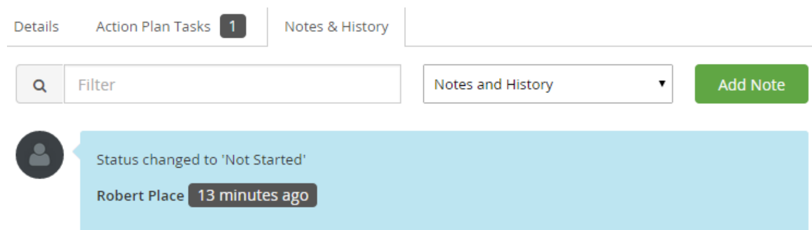
Selecting the  icon will delete your action point.

Notes and History

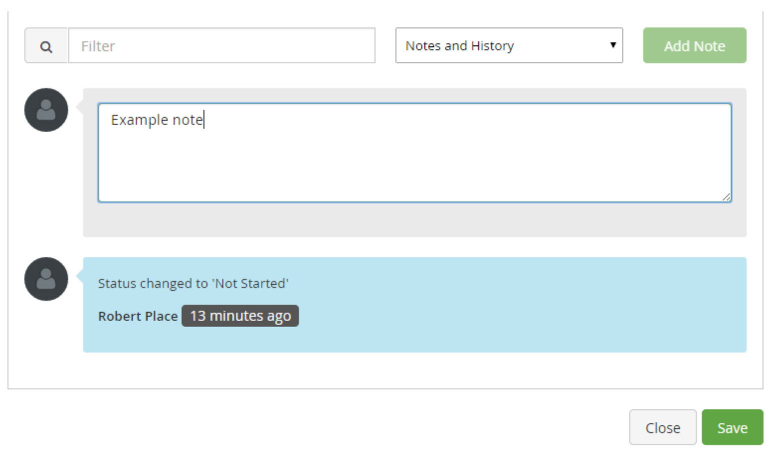
To see your notes and historical activity please select this option at the top of a question page.



Here you will see a list of your activities within this question. This is your Audit log and every action you take will be kept here for future reflection. If you wish to add a note to this list please select 'Add Note' at the top right of the box.

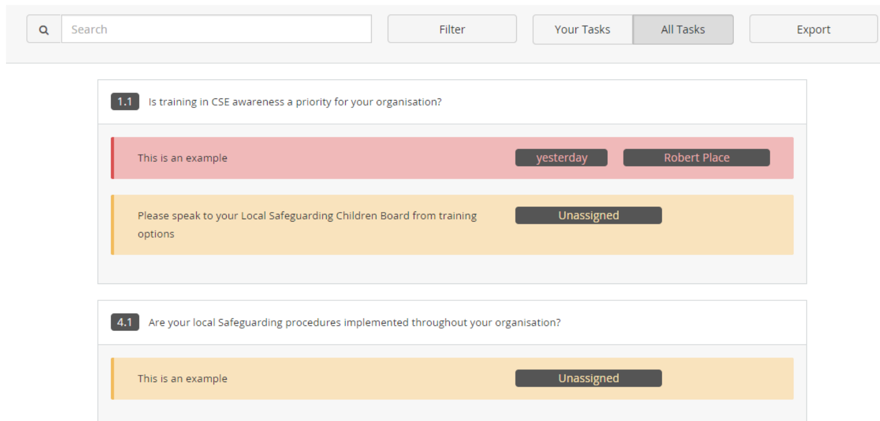


As with all actions in the audit system please select 'Save' when adding a new note.



View all action plans

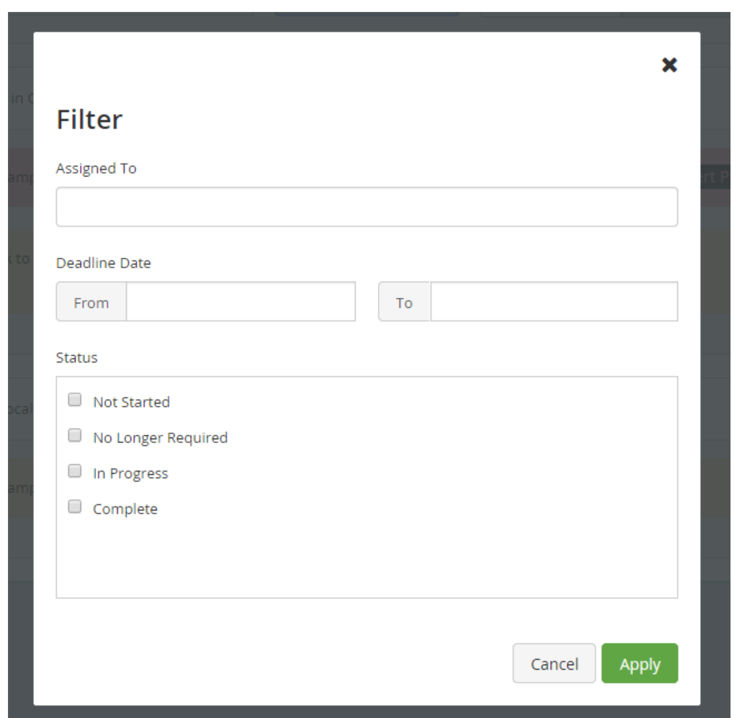
To view all action plans for a particular audit, simply open this audit up and select 'Action Plan' from the blue menu at the top of the page.



Here you'll see a list of the action plans; they are organised by question allowing you to view the actions within the context of their question base.

Using the colour coding system it is easy to identify active actions, actions past their deadline and actions completed.

To view an action in more details simply click on the one you wish to view, this will then take you to the question box.



Navigation

You will automatically be shown all the actions relating to this audit. If you wish to filter this and only view the actions allocated to yourself simply select the 'Your Tasks' icon.

Selecting filter  will allow to to choose filtering parameters.

You can filter on:

Who the audit is assigned to

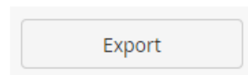
The deadline date

The status of the action plans

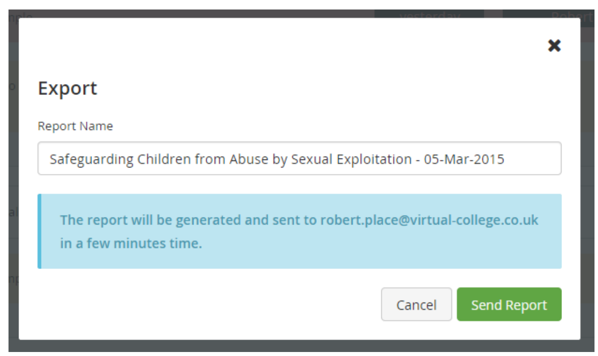
Individual Audit Reports

Action Plans

To receive a printable copy of your Action Plans simply select the ‘Export’ icon.



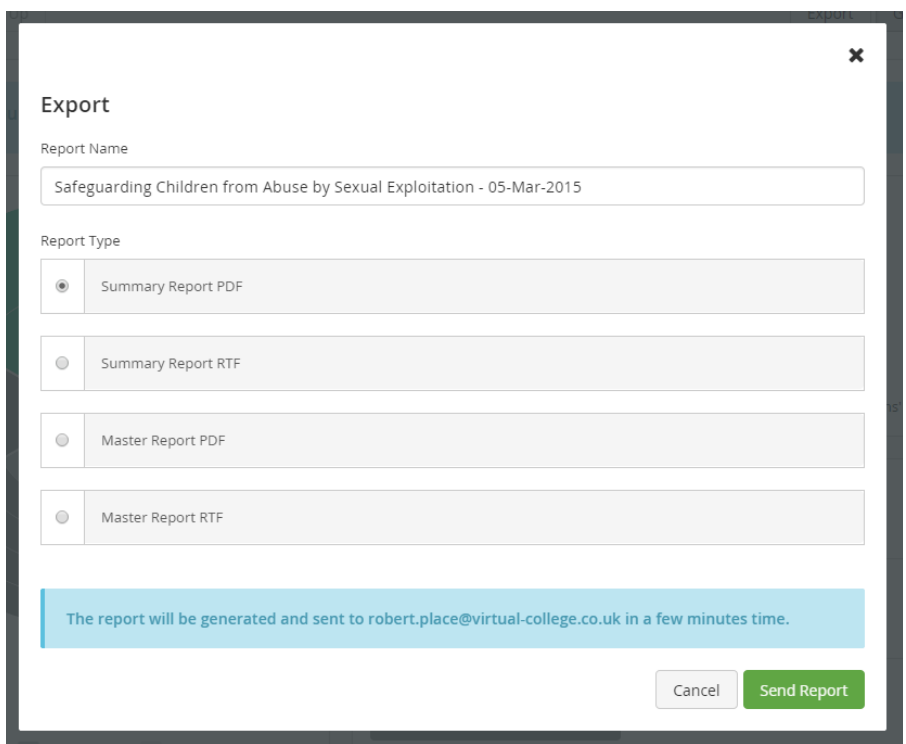
Here you’ll be able to name your export file which will be emailed to you. The report will be sent to the email address you used to sign up to the audit system.



Export your Audit

At the main page of your audit select the ‘Export’ icon at the top right of the screen.

Name the export file using the **Report Name**



Summary Report: this is a quick outline of your progress and score

Master Report: this is a full detailed report of your audit.

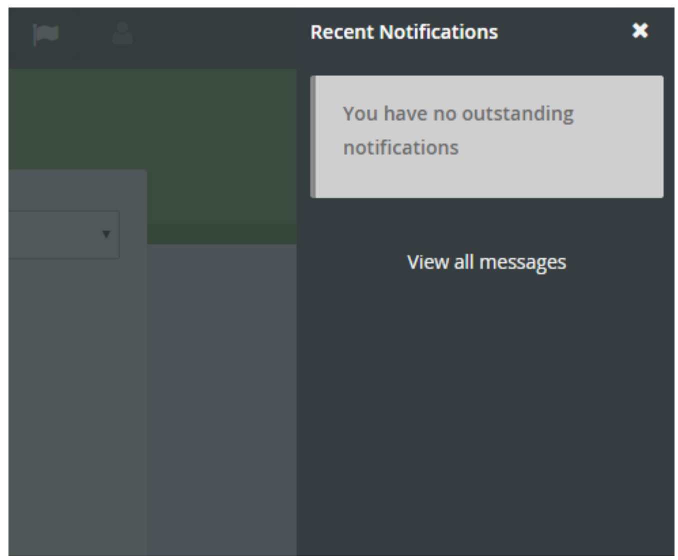
PDF – non-editable format

RTF – word processor (editable)

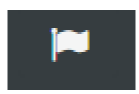
The report will be emailed to your email address.

Notifications

Notifications are a messaging system. Your audit managers are able to message you directly within in the system and, if applicable, directly to your email account.

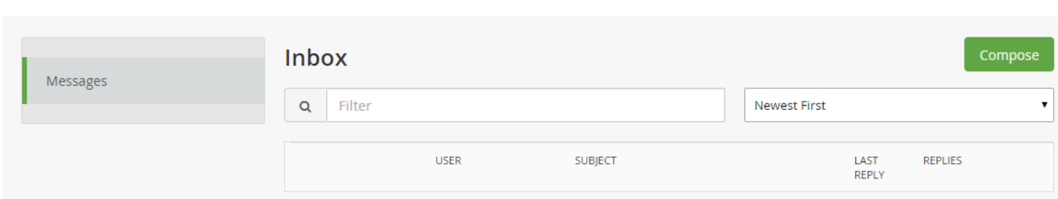


Should you be allocated an audit, and audit question or action plan you'll automatically receive a notification within the system and by email.



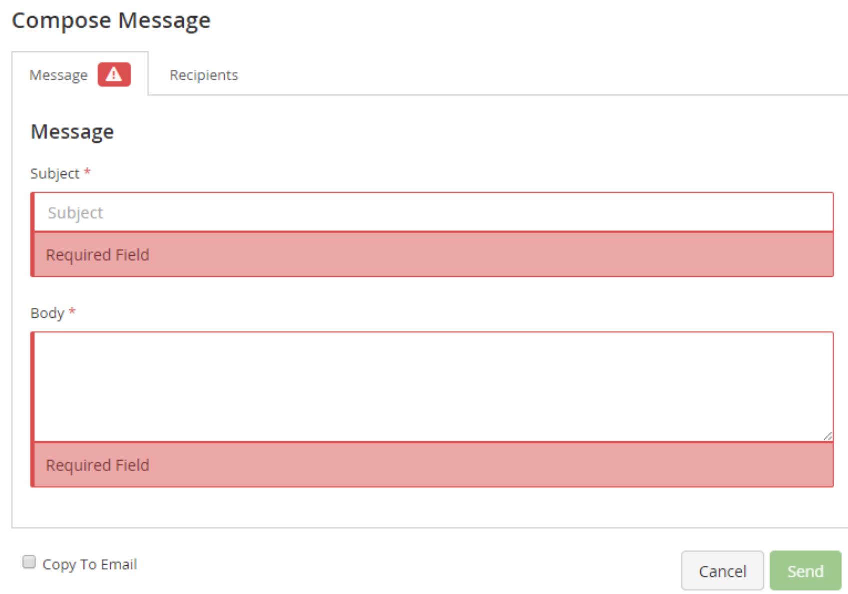
Notifications are seen by selecting the flag icon in the top right of the screen and will bring up a messaging bar on the right hand side.

If you select 'View all messages; you will be brought to your system inbox, here you can reply to messages and/or compose a new message to be sent.



Click ‘compose’ to start writing your message.

If you select ‘copy to email’ your recipients will also receive your notifications by email.



Completing and Finishing your Audit

You are able to stop and start your audit at any time.

As you are always asked to save your audit when answering your questions you can log out at any time.

To log out please go to the avatar symbol at the top right of the webpage, situated next to your notifications icon.

Here you’ll be given the option to log out for change your account details.