

How to Define Local Audit Periods and Add Local Audits

Scope: Organisation Administrators, Region Administrators, Organisation Group Administrators

Screen overview -

	1) TOP LEVEL MENU				
` Ğ • E	HA	н	ome Sessions Au	English (Australia) dits Organisations	Test Hospital Admin Lo
ashboard > Users					
Users			2) ADD NEW	/ BUTTON	Add Use
Username:		Organisation:	Any		
First Name:		Department:	Any	•	
Last Name:		Role:	Any		
Keyword:					
Include deleted: Search			3)) SEARCH FILT	TERS
		Showing 10 💌 results, 1	-10 of 305		
) RESULTS D	ISPLAY	3 4 5 6 7	8 9 31	Next >	
Userna			Email		Role
	Admin, Test Hospital	ignaz@	testhospital.com	Organisatio	n Administrator
1 testhospital					
	AUDITOR, TEST		ditor@testhospital.com	Auditor	

Audits Periods and Audits

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

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 <u>Period</u> below) which they can create audits for. Moments collected against a local audit <u>are</u> <u>not</u> included as part of the national program





Section 1 Adding an Audit to an Audit Period

1.1 – Viewing an Organisations Audits

>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

				English (Australia)	Test Hospital Adm	in Logout
HHA	Home	Sessions	Audits	Organisations	Contacts	Users

OR

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

>Click the Organisations button in the top level menu

			English (Australia)	Test Hospital Admir	Logout
Home	Sessions	Audits	Organisations	Contacts	Users

>Click an organisation's name to select it.

Organisations						
Code:						
Name:						
Search						
8		To	otal results: 1			
Code	Name	🔺 Туре	Depts	Beds	Parent	
1 TEST-HOSP	TEST HOSPITAL	Public	12	100	Australian Capital Territory	

This will take you to the Organisation Administration screen

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

Dashboard > Organisatio	on List > Organisation Audits		
TEST HOSPITAL	- Audits	ORGANISATION MENU	Add Audit +
Name: Audit Type: Audit Period: Audit Status: Spans Date:	Any	AUDITS	Audits Audit Periods Sessions Departments HCW Types
Search			Users Details

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:		Organisa	tion: Any	•					
Audit Type:	Any								
Audit Period:	Please Select Parent								
Audit Status:	Any								
Spans Date:									
Search									
		Showing 10	 results, 1-10 	of 12					
< Previous 1 2 Next >									
	Name	Start Date 🔻	End Date	Status	Sessions	Organisation			
1 NHHI Audit On	e 2013	01/11/2012	31/03/2013	Active	2/11	TEST HOSPITAL			
2 Spot Audits 201	12	01/07/2012	31/12/2012	Pending Approval	1/1	TEST HOSPITAL			

1.2 Adding an Audit to a Local Audit Period for an Organisation

>Click Add Audit +

Audits	Add Audit +

>Select the Audit Type, Organisation and Audit Period If no audit period is selectable, see Section 2 below on how to define a Local Audit Period

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

Add Aud	lit	
	Audit Type:	Local
	Organisation:*	Test Hospital
	Audit Period:*	Local Audit
		Local Audit
	Start Date:*	17/03/2013
	End Date:*	20/03/2013
Save C	ancel	

>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.



Section 2 Local Audit Periods

Organisations can create Local Audit Periods for audits that an organisation does not want included as part of a national program.

2.1 Defining a Local Audit Period

>Click the Organisations button in the top level menu

English (Australia) Test Hospital Admin Logout						
Home	Sessions	Audits	Organisations	Contacts	Users	

>Click the name of the organisation the audit period is to be defined for.

anisations					
Code:					
Name:					
ch					
		т	otal results: 1		
Code	Name	🔺 Туре	Depts	Beds Parer	ıt
	TEST HOSPITAL	Public	12	100 Australian Capital Territor	

>Click Audit Periods in the Organisation Menu.

TEST H	- HOSPITAL	Audit Periods				_		Add Aud	it Period +
				ORGANIS	SATION MEN	νυ 📙	\rightarrow		
	Name:		L					Audits)
	Spans Date:							Audit Periods	
	Spans Date.						1	Sessions	
				AUDIT	PERIODS			Departments	
						•		HCW Types	
								Users	
							l	Details	J
Searc	:h								
_	_		Showing 10 💌 res	ults, 1-10 of 12					
			< Previous 1	2 Next >)				
testing									
		Name	Star	t Date 🔻 🔻	End Date	Туре	Audits		
1	Nexus Audit		28/06/20	011 28	3/07/2011 Lo	ocal	0		
2	2012 Audit		01/01/2	012 01	L/01/2013 Lo	ocal	0		
3	21		24/05/20	010 25	5/05/2010 Lo	ocal	0		
4	Spot Audit		11/05/20	010 14	4/05/2010 Lo	ocal	0		
5	Spot Audits 201	2	01/07/20	012 31	L/12/2012 Lo	ocal	1		
6	Mobile Practice		01/01/2	012 31	L/12/2012 Lo	ocal	1		
7	Mobile Practice		01/01/2	011 31	L/12/2011 Lo	ocal	1		

>Click Add Audit Period +

TEST HOSPITAL - Audit Periods

Add Audit Period +



>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	Туре	Audits
1 Local 2012 Audit	01/01/2012	31/12/2012	Local	0

You will need to add an audit to this audit period as per section 1.3 above prior to entering data.

2.1 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 an administrator with access to the organisation

>Click the Organisations button in the top level menu



>Click an organisation's name to select it.

rganisations					
Code:					
Name:		_			
earch					
		Te	otal results: 1		
Code	Nemo	A Turns	Dente	Davis	Deterret
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		Add Audit Period +
	ORGANISATION MENU	
Nerrer		Audits
Name:		Audit Periods
Spans Date:		Audit Periods
		Sessions
	AUDIT PERIODS	Departments
		HCW Types
		Users
		Details
Search		
Showing 10	results, 1-10 of 11	
	1 2 Next >	
testing		
Nama	Start Data Type	Audite
1 Local 2012 Audit 0	1/01/2012 31/12/2012 Local	0

>Enter the new date

Add Audit Period to TEST HOSPITAL						
Name: [*] Local 2012 Audit						
Start Date: [*] 01/01/2012						
End Date: 31/01/2013						
Save Cancel						

>Click Save

Name	Start Date 🔻 🔻	End Date	Туре	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.



1	TEST HOSPITAL	- Audits						Add Audit +
	Name:						Audits	
	Audit Type:	Any	_				Audit Periods	
	Audit Period:	Any					Sessions	
	Audit Status:	Any					Departments	
	Spans Date:						HCW Types	
	Spans Date.						Users	
							Details	
	Search							
		Show	ing 10 🔽 resul	ts, 1-10 of 13				
			Previous 1	2 Next >				
		Name	Start Date	End Date	Status 🖌	Sessions		
	1 Local 2012 Aud	it	01/01/2012	31/12/2012	Active	0/0		