File Audit

Adding a File Audit

Once logged into the Riliance system you will arrive at the Home screen.

From here to access the File Audit module select this from the 'Modules' dropdown found in the toolbar along the top of the screen **(1)**.

You will arrive at the 'File Audits' home page. To add an audit to the system select the green 'Add' button **(2)**.

This will open a pop up window where you can select the appropriate question set you wish to use **(3)**.

After making your selection click the green '+ New File Audit' button to proceed **(4)**.

Your question set will now open and you will now be able to proceed with the file audit, adding in the appropriate information as directed by the form **(5)**.

Whilst answering the file audit questions, should you wish to add any comment or observations to any particular question, click the 💬 icon next to the question. This will open a box to input your text. **(6)**

At the end of your audit question set, you have the option to select if any Corrective Actions are required.

Corrective Action Not Required:

If corrective actions **are not required**, select 'No' at **(Step 7)** and then click the 'Save' button to record the file audit on to the system **(8)**. Now skip to **(Step 18)**.
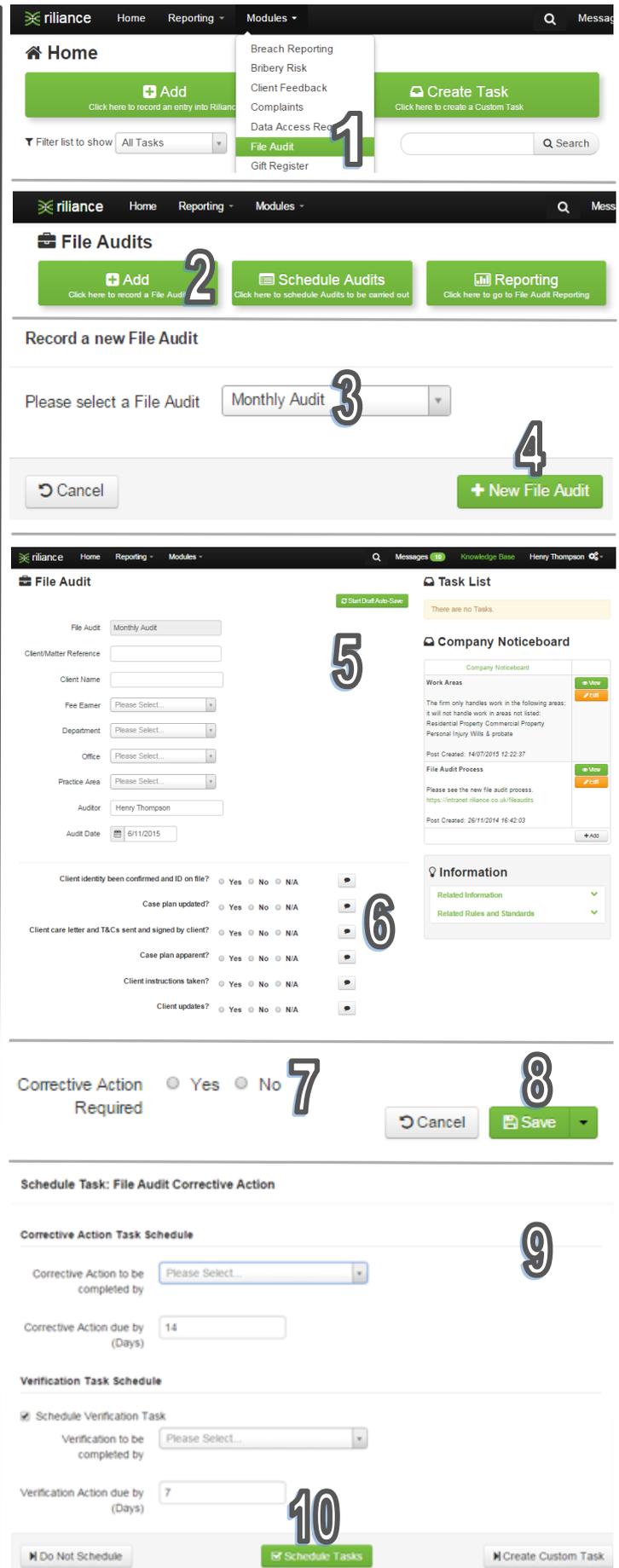
Corrective Action Required:

If corrective actions **are required**, select 'Yes' at **(Step 7)** and this will open a text field where you can input information relevant to the action required.

Once you are satisfied the relevant information has been logged click the green 'Save' button **(8)** to record the file audit on to the system.

This will save the audit to the system **(9)** and open a window where you will be prompted to assign the Corrective Action Task due the relevant individual and the due date of the corrective action, now click 'Schedule Task' **(10)**.

An email notification will be sent to the user who is assigned the task

File Audit

Completing a File Audit Task

Tasks assigned to you on the File Audit module will be displayed in the 'Task List' on the right hand side of the File Audits homepage **(11)**. Find the relevant task and click the green 'View' button next to it.

This will open the summary screen for the file audit in question **(12)**. To view your specific task in relation to that file audit locate the task in the Task List on the right hand side of the summary page and again click the green 'View' button **(13)**.

Corrective Action Task

If you are set a Corrective Action Task, locate your relevant task using **(Steps 11-13)**.

Your Corrective Action Task will now appear **(14)** and you will be informed of what corrective actions are required.

Once you have completed those actions, you will need to detail how these were carried out, stating a completion date, now click 'Complete Task' button **(15)** to record these actions on the file audit record.

If a Verification Task has been set, an email notification will now be sent to the user who is assigned the task.

Verification of Corrective Action Task

If you are set a Verification Task, locate your relevant task using **(Steps 11-13)**.

Your Verification Task will now appear **(16)** and you will be informed of what corrective actions were given and of how these were completed.
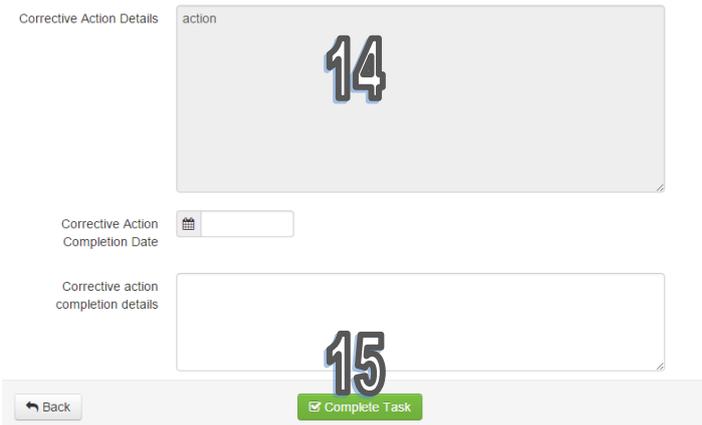
Once you have reviewed this information, you will need to detail your verification, stating a completion date.

Once all relevant information has been completed, click the 'Complete Task' button **(17)** to record this verification on the file audit record.

You will be brought back to the summary page of the file audit where you should see that "There are no Tasks" listed under the Task List and that no further action is required (18).