



AUDIT/TASK SCHEDULE | User Guide

2026

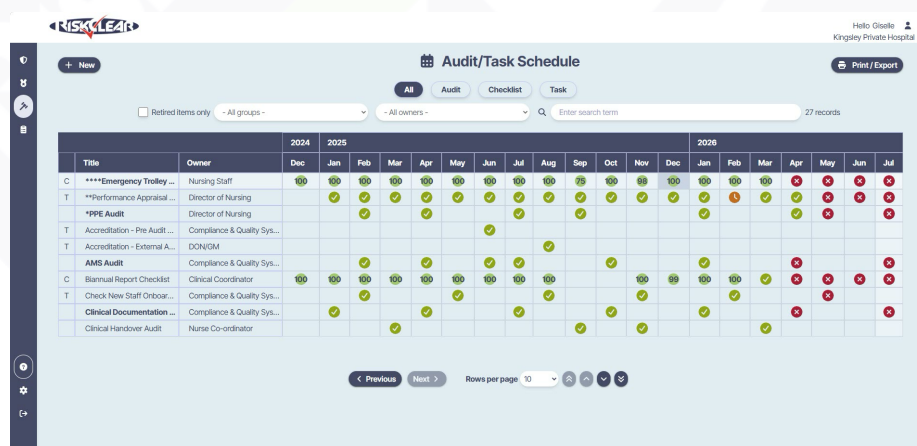
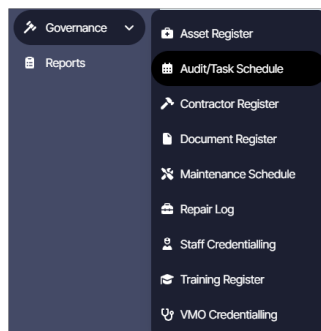


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INTRODUCTION

The Audit/Task Schedule provides a central location to plan, manage and monitor your organisation's audits, checklists and recurring tasks. Organisations can schedule activities, automatically repeat recurring audits, notify owners and auditors, record completion, attach supporting evidence, link Quality Improvement and Risk/Hazard records and report on compliance.

Access the **Audit/Task Schedule** via **Governance** on the **Side Navigation Panel**



FLOATING NAVIGATION BAR



Throughout RiskClear the **Floating Navigation Bar** provides quick access to common functions within that module including:

- Cancel
- Settings (where available)
- Open Template
- Update & Close
- Print / Export

The Audit/Task Schedule displays all scheduled **Audits, Checklists and Tasks** in a calendar-style view.

Title	Owner	2025					2026												2027		
		Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
T Accreditation - Pre Audit ...	Compliance & Quality Sys...																				
T Accreditation - External A...	DON/GM																				
AMS Audit	Compliance & Quality Sys...																				
C Biannual Report Checklist	Clinical Coordinator																				
Chart Audit	Case Manager 1																				
T Check New Staff Onboard...	Compliance & Quality Sys...																				
C Clinical Documentation ...	Compliance & Quality Sys...																				
Clinical Handover Audit	Nurse Co-ordinator																				
C CSSD Checklist	Nursing Staff																				
T Donor Register Updates	Clinical Coordinator																				
C Emergency Trolley Che...	Nursing Staff																				
T Key Register Review	Nurse Co-ordinator																				
T MAC Meeting (Biannual)	DON/GM																				
T Performance Appraisal Pr...	Director of Nursing																				
PPE Audit	Director of Nursing																				

Screen functions include:

- + New creates a new Audit, Checklist or Task
- Print / Export & Tablet Audits
- Audit, Checklist and Task filters
- Group and Owner filters
- Keyword search
- Retired items only
- Record count

Completed items display their compliance result where applicable, or a tick, while future and overdue items are orange and red respectively.

SETUP FUNCTIONS

Setup can be completed via **Settings** in RiskClear via the **Side Navigation Panel** or from within the **Audit Task Schedule** screen by clicking the **Settings** symbol >

The following panel appears > **Audit/Task Owner** and **Audit Groups** can be setup/edited from here.

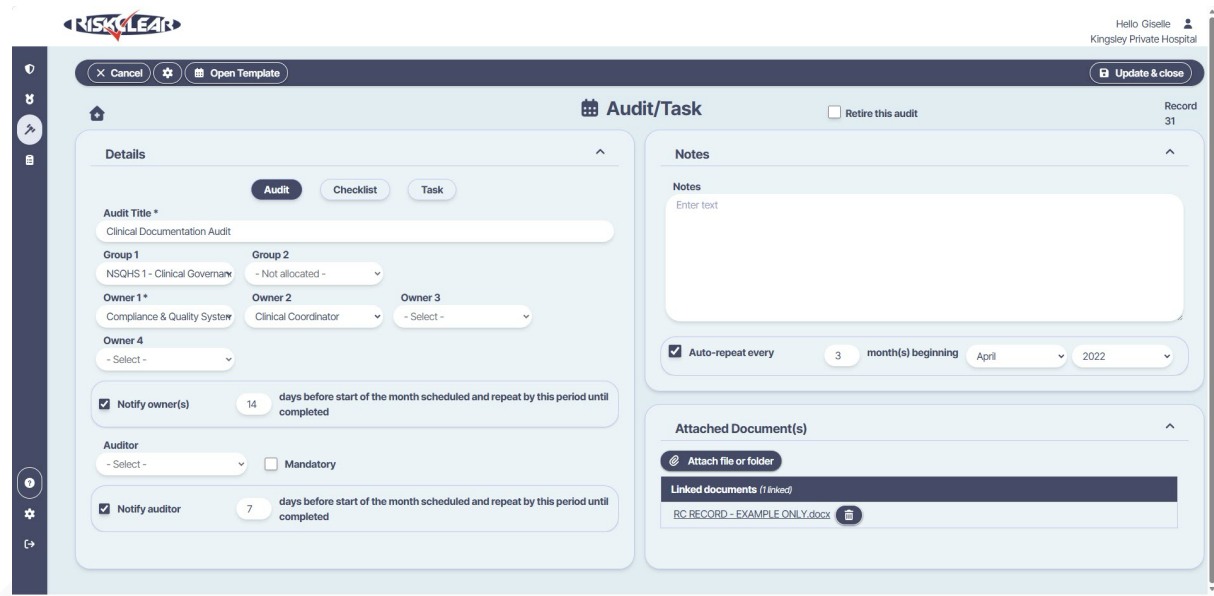
✕ Cancel
Configure Audit Schedule page setup

Select field to update

Audit/Task Owner
Audit Groups

CREATING YOUR SCHEDULE OF AUDITS, CHECKLISTS AND TASKS

From the Main Audit Schedule screen click **+ New** > the following screen appears:



The screen is organised into **cards** which group related information together (**Details**, **Notes** etc).

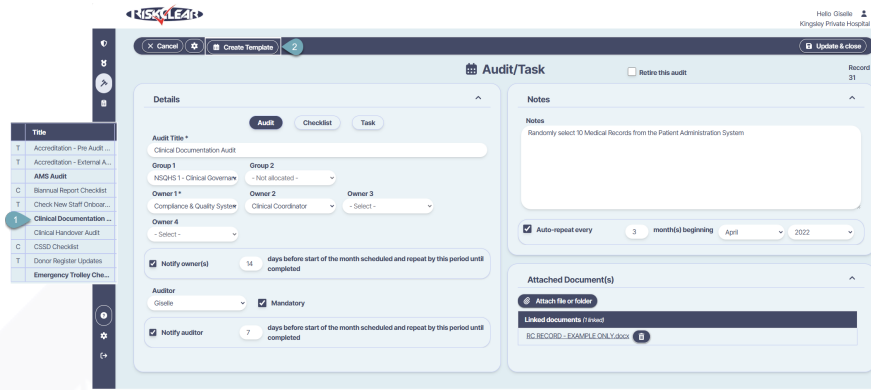
1. Select whether the record is an **Audit, Checklist or Task**.
2. Enter a **Title**.
3. **Select** the appropriate **Group(s)**.
4. **Allocate** one or more **Owners**.
5. Select an **Auditor** where applicable and indicate if the audit is **Mandatory**.
6. Configure **Owner and Auditor** reminder **notifications**.
7. Use **Auto-repeat** to automatically schedule recurring activities.
8. **Enter Notes** if required.
9. Attach **supporting documents** such as policies, audit templates, checklists or instructions.
10. Select **Open Template** where an audit template is required (for tablet audits).
11. Click **Update & Close**.

Tip: Assign more than one Owner where possible so another staff member can complete the audit if the primary owner is unavailable.

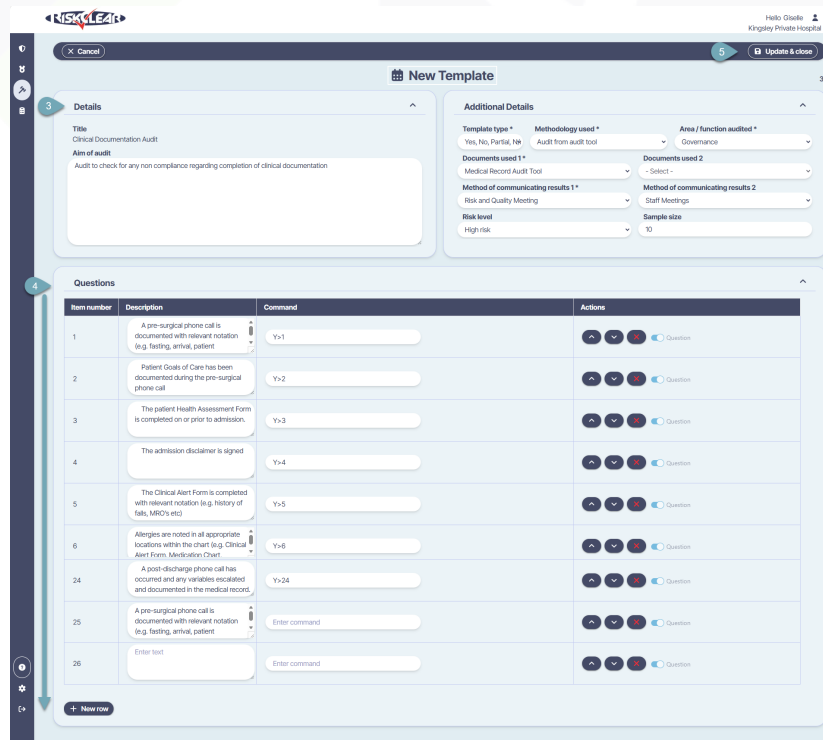
CREATING TABLET AUDITS

CREATING AN AUDIT TEMPLATE FOR TABLET AUDITS

1. On the **Audit Schedule**, click on the **Audit** you wish to create a template for (that can be completed on a tablet).
2. Click **Create Template**



3. A **New Template** screen opens > complete the **Details** and **Additional Details** for that audit.
4. Type your **audit questions**. Add more questions by clicking **+New row** until all completed.
5. Click **Update & Close** to save your audit.

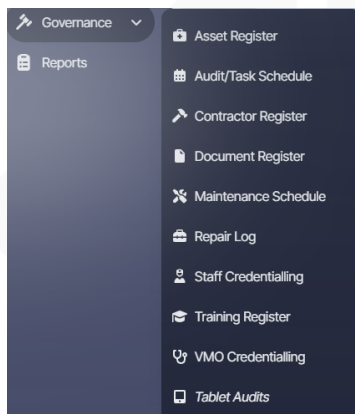


COMPLETING AN AUDIT USING THE TABLET FUNCTION

1. Click **Tablet audits** on the **Audit Schedule** page

<

You can also find Tablet Audits via the Side Navigation Panel > Governance > Tablet Audits



2. The following screen will appear > select the **Auditor** (mandatory) and Auditee (optional), click **Start>**

Kingsley Private Hospital

On-screen keyboard: on

Select the Auditor*

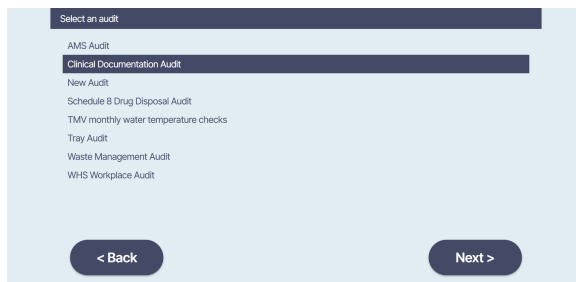
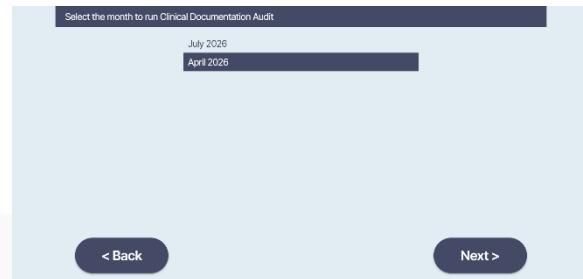
Giselle

Select the Auditee

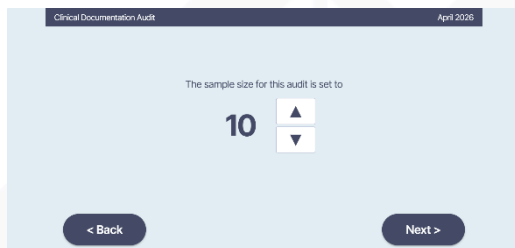
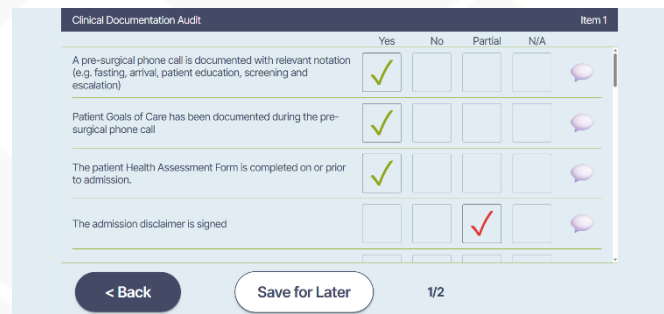
- None -

Exit Start>

3. Select an **audit** from those listed, click Next> select the **month**, click **Next>**

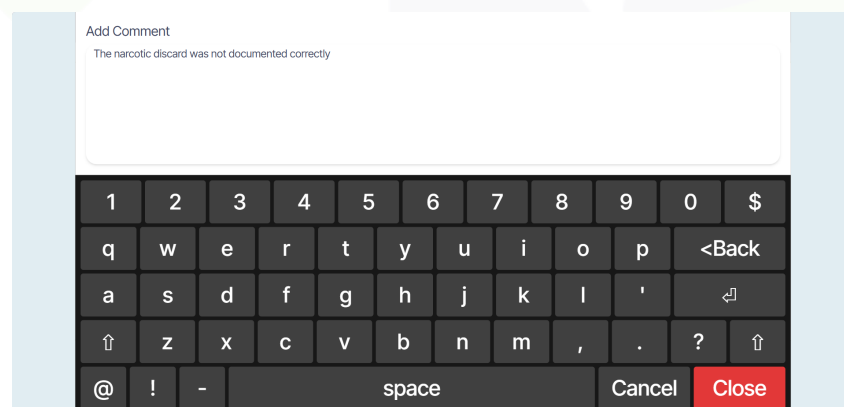



4. The **audit sample size** is displayed and can be adjusted up or down where necessary, click **Next>** and proceed with **completing the audit questions**

	Yes	No	Partial	N/A	
A pre-surgical phone call is documented with relevant notation (e.g. fasting, arrival, patient education, screening and escalation)	☒	☐	☐	☐	
Patient Goals of Care has been documented during the pre-surgical phone call	☒	☐	☐	☐	
The patient Health Assessment Form is completed on or prior to admission.	☒	☐	☐	☐	
The admission disclaimer is signed	☐	☐	☒	☐	

You can add **comments** to each of the questions by **clicking**  and adding your **response**.



5. Once all audit questions are completed the compliance rate and any **non-conformances** will be displayed

Clinical Documentation Audit

Compliance rate:
98.07 %

Identified non-conformance:
The admission disclaimer is signed
Only abbreviations and symbols in Clinical Policy Abbreviations and Medical Symbols are used.

< Back
Next >

6. The **Audit Result** will appear and you can select whether it is **Satisfactory**, **for Observation or Non-Compliance**. You can also determine whether there is **Change required** and/or **Repeat (audit) required**. Ticking this box will allow you to choose a repeat **date**.

Click **Finish>** and the final screen confirming the **Audit Summary Record** creation will appear.

Clinical Documentation Audit

Audit Result **98.07 %**
Satisfactory Observation Non-compliance

☐ Change required? ☐ Repeat required? Date < Aug 2026 >

Recommendations
Remind staff to use accepted abbreviations as per policy (Staff Meeting)
Remind staff/anaesthetists to document narcotic discards completely

Follow-up details
Discuss findings at Staff Meeting (April 15th)
Discuss findings at next Risk and Quality Forum and MAC (June 2026)

< Back Finish >

Clinical Documentation Audit

This audit has been completed and uploaded to RiskClear, and audit summary record AU00389 has been created.

Close

The **Audit Compliance** result will now appear on the **Audit Schedule**.

Clinical Documentation ...	Compliance & Quality Sys...		98
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The **Audit Summary** can be found via the **Side Navigation Panel > Search Quality > Audit Summaries** and clicking on the record.

COMPLETING A SCHEDULED AUDIT/CHECKLIST/TASK

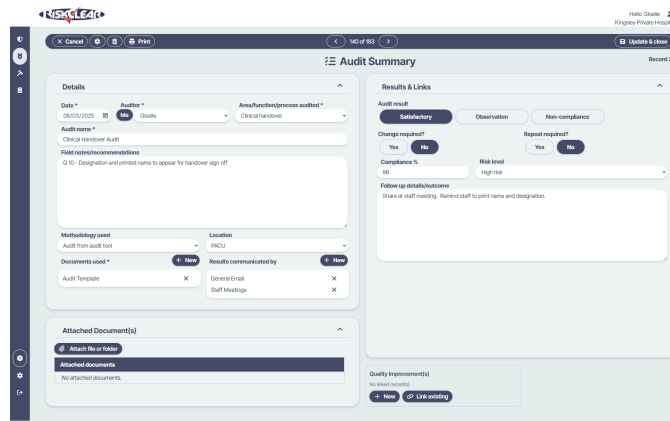
COMPLETING AN AUDIT (PAPER-BASED)

Click on the scheduled Audit for that month from the Audit/Task Schedule > e.g. Clinical Handover Audit (March).

			2024	2025		
	Title	Owner	Dec	Jan	Feb	Mar
	Clinical Handover Audit	Nurse Co-ordinator				98

> the following window will appear:

1. Select the **Auditor**
2. Enter the **Audit completed on date** (tick Not completed where applicable)
3. Click **Create Audit Summary** (the Audit Summary screen will appear > complete accordingly)

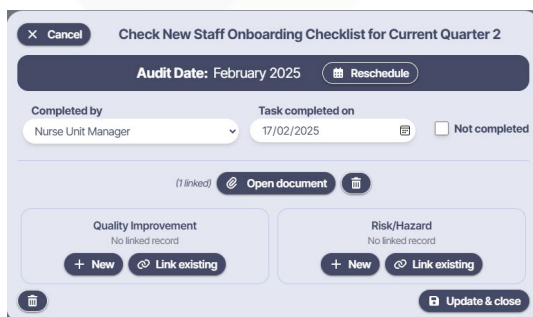


4. **Attach** supporting evidence (e.g. the completed paper-based audit template)
5. **Create or link a Quality Improvement** and/or **Risk/Hazard** record where required
6. Click **Update & Close**

COMPLETING A CHECKLIST

Click on the scheduled Checklist for that month from the Audit/Task Schedule.

Title	Owner	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
C ****Emergency Trolley ...	Nursing Staff	100	100	100	100	100	100	100	100	100	75	100	98	100	100	100	100	×	×	×	×

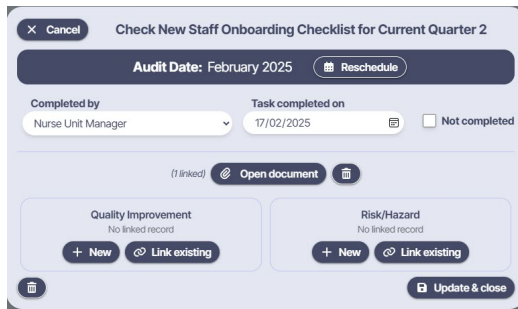


Checklist completion follows the same process as an Audit. Enter the **Completed by** details, **Compliance Rate** and **Checklist** completed on **date**. **Supporting evidence** can be attached and **Quality Improvement or Risk/Hazard records created or linked** before selecting **Update & Close**.

COMPLETING A TASK

Click on the scheduled Task for that month from the Audit/Task Schedule.

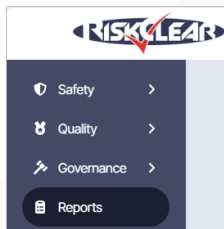
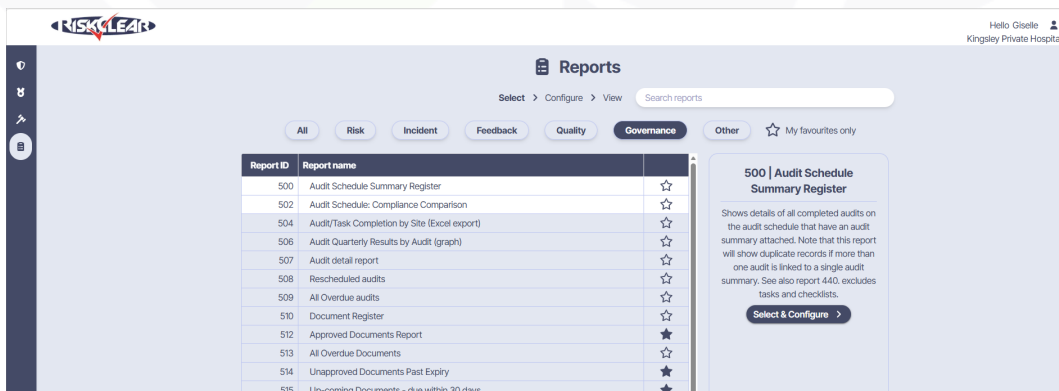
Title	Owner	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
T **Performance Appraisal ...	Director of Nursing		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	×	×	×



Tasks are completed in the same manner. Record **who completed** the task, enter the **completion date**, **attach supporting evidence** where appropriate, **link Quality Improvement or Risk/Hazard** records if required, then select **Update & Close**.

AUDIT REPORTS

Audit and Task reports are available via **Reports** on the **Side Navigation Panel**.

Report ID	Report name	Star
500	Audit Schedule Summary Register	☆
502	Audit Schedule: Compliance Comparison	☆
504	Audit/Task Completion by Site (Excel export)	☆
506	Audit Quarterly Results by Audit (graph)	☆
507	Audit detail report	☆
508	Rescheduled audits	☆
509	All Overdue audits	☆
510	Document Register	☆
512	Approved Documents Report	☆
513	All Overdue Documents	☆
514	Unapproved Documents Past Expiry	☆
515	Up-coming Documents - due within 30 days	☆

Various **Audit reports** can be generated in RiskClear.

Click **Governance** or use the **Search All reports** function. Each report provides a **description** of what it generates, and you can "star" any reports as a "favourite" report also.