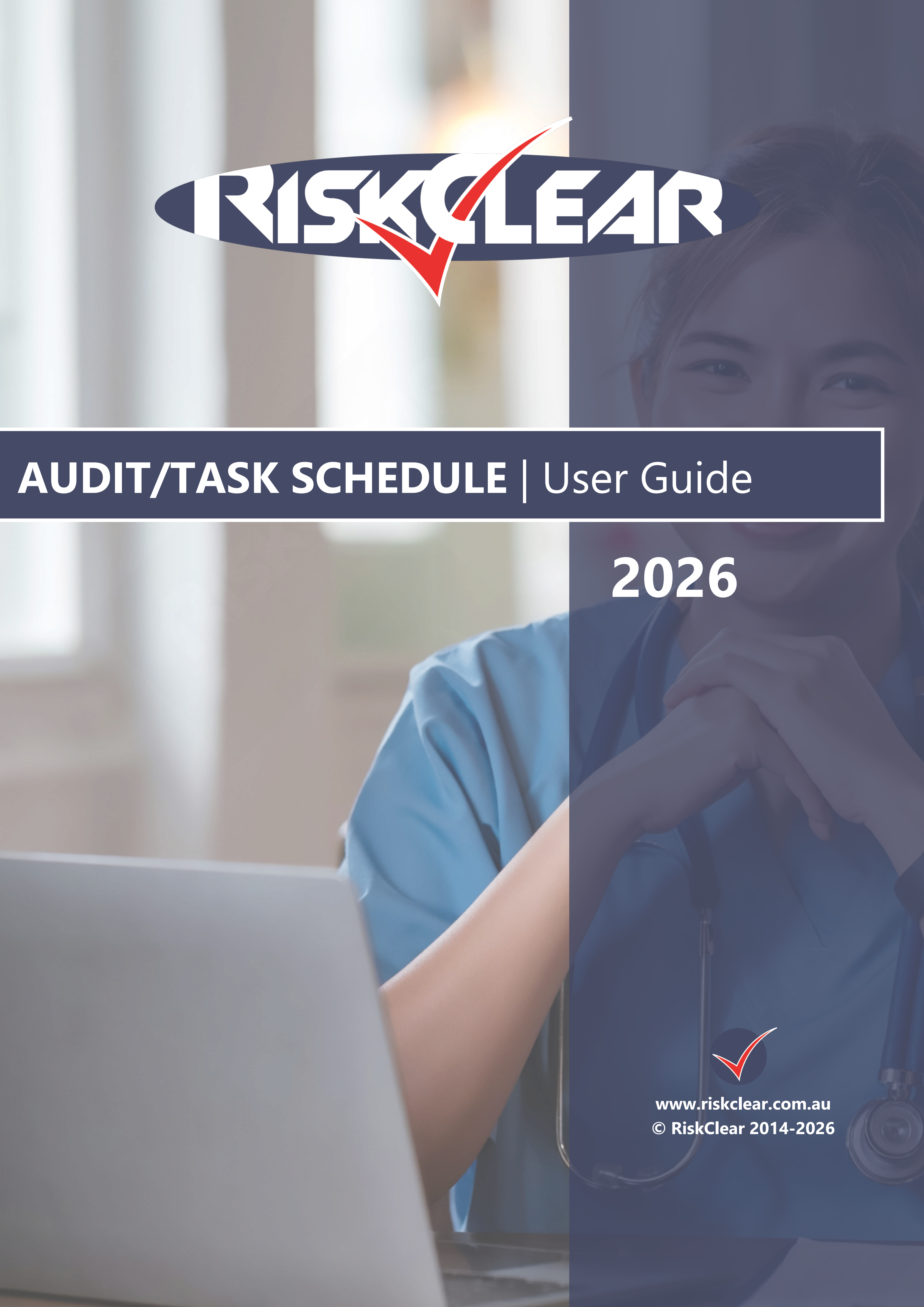


AUDIT/TASK SCHEDULE | User Guide

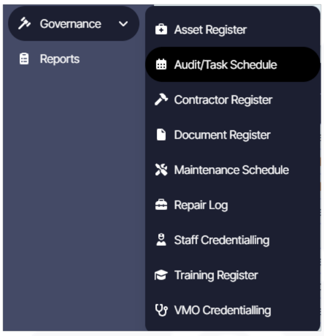
2026

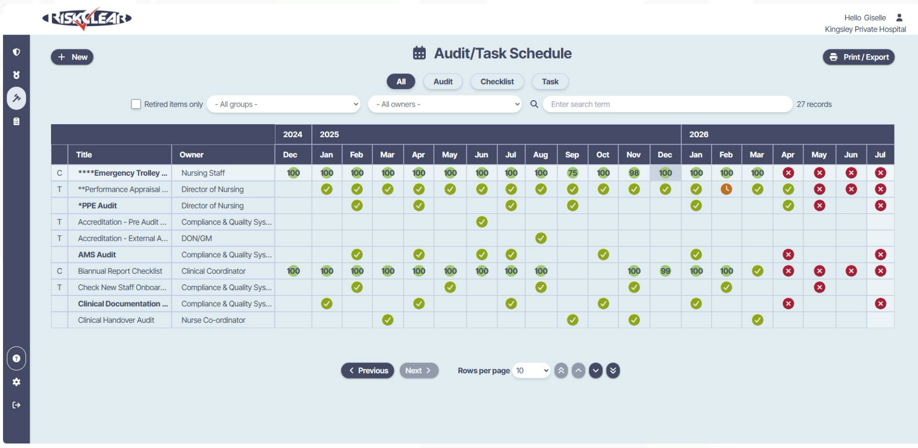
www.riskclear.com.au

INTRODUCTION

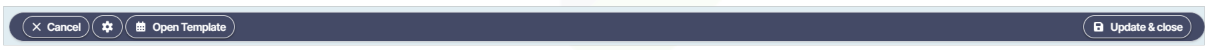
The Audit/Task Schedule provides a central location to plan, manage and monitor your organisation's audits, checklists and recurring tasks. Organisations can schedule activities, automatically repeat recurring audits, notify owners and auditors, record completion, attach supporting evidence, link Quality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

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





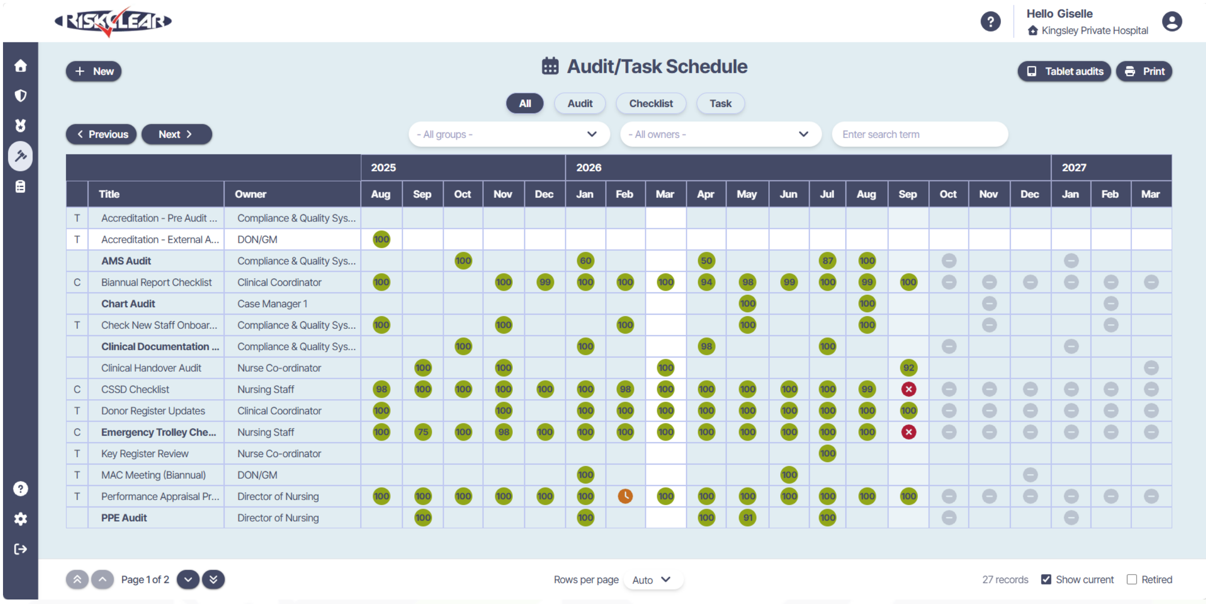
FLOATING NAVIGATION BAR



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.



Screen functions include:

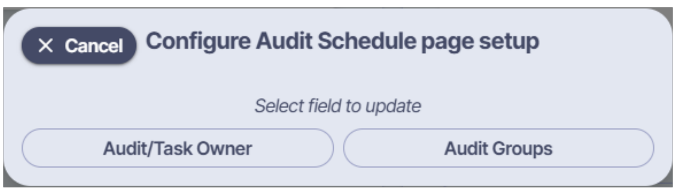
- + New creates a new Audit, Checklist or Task
- Print / Export & Tablet Audits
- Audit, Checklist and Task filters
- Group and Owner filters
- Keyword search
- Retired items only
- Record count

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

SETUP FUNCTIONS

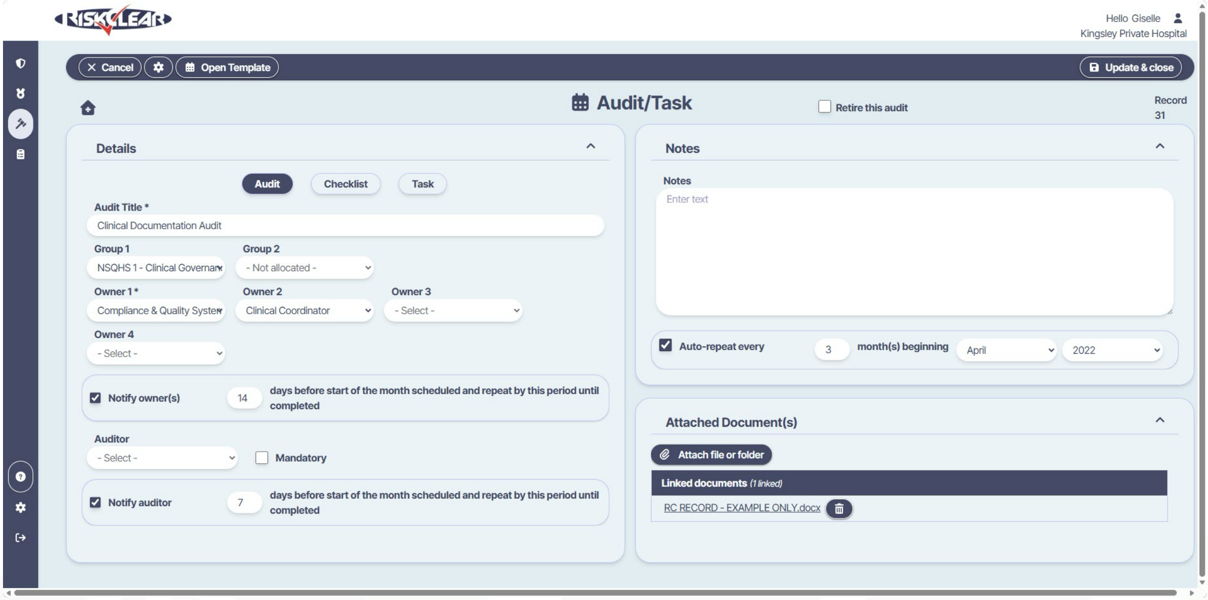
Setup can be completed via **Settings** in RiskClear via the **Side Navigation Panel** or from within the **Audit Task Schedule screen** by clicking the **Settings symbol >** .

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



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).

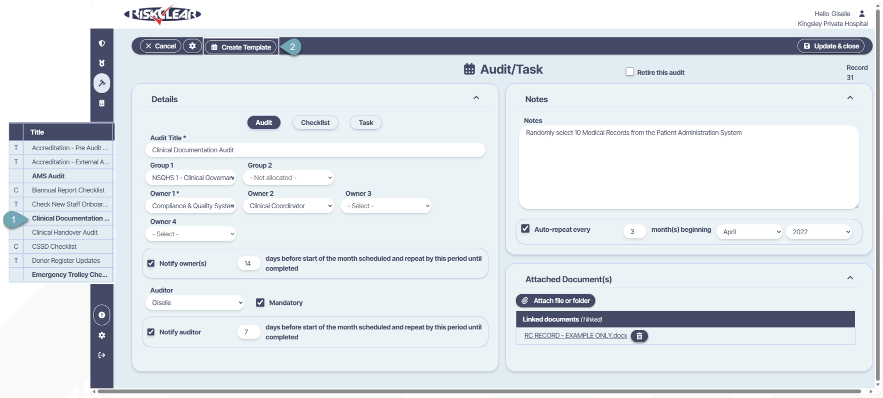
1. Select whether the record is an **Audit, Checklist or Task**.
2. Enter a **Title**.
3. **Select** the appropriate **Group(s)**.
4. **Allocate** one or more **Owners**.
5. Select an **Auditor** where applicable and indicate if the audit is **Mandatory**.
6. Configure **Owner and Auditor** reminder **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.

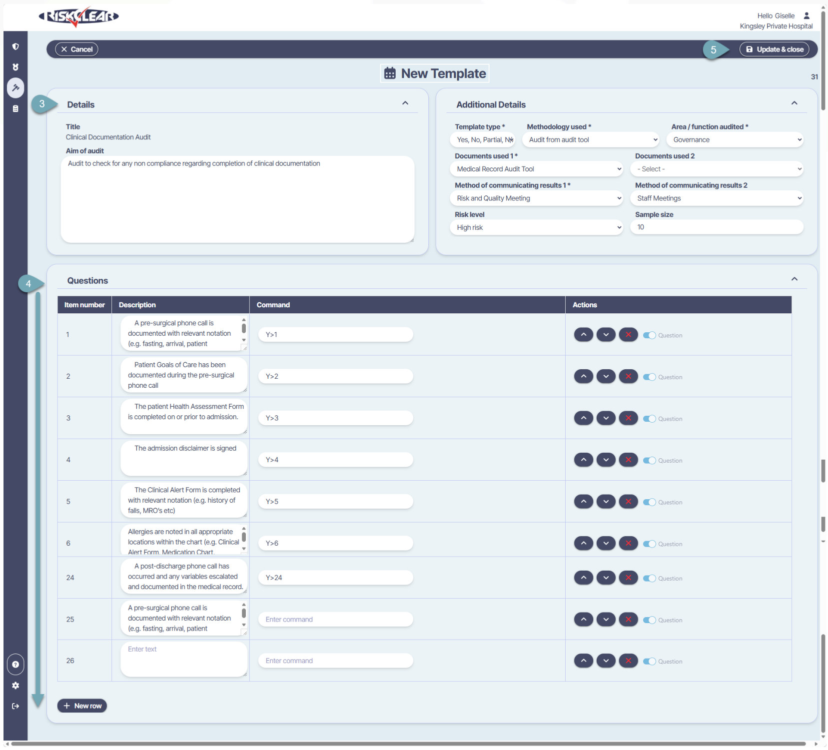
CREATING TABLET AUDITS

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**

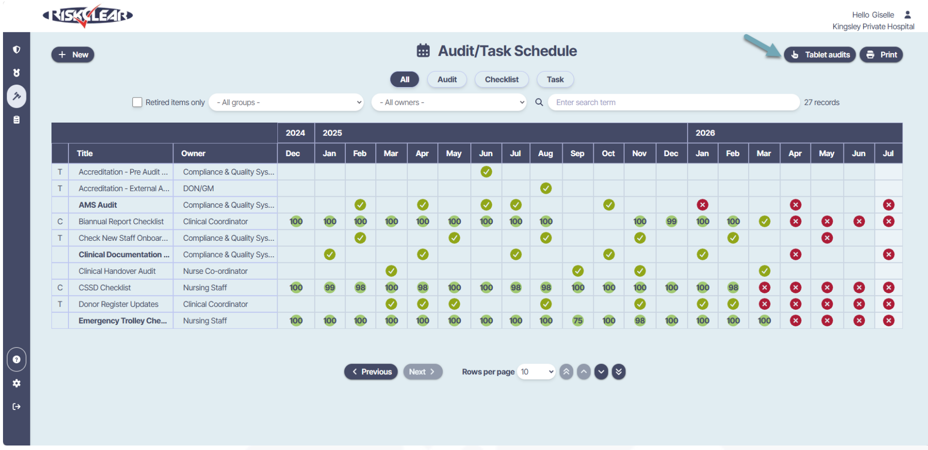


3. A **New Template** screen opens > complete the **Details and Additional Details** for that audit.
4. Type your **audit questions.** Add more questions by clicking **+New row** until all completed.
5. Click **Update & Close** to save your audit.

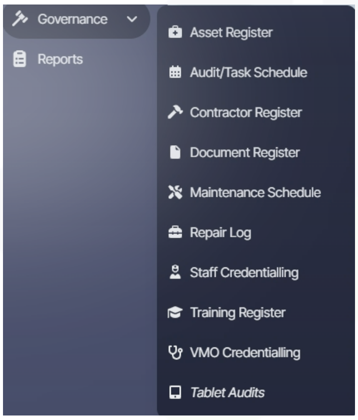


COMPLETING AN AUDIT USING THE TABLET FUNCTION

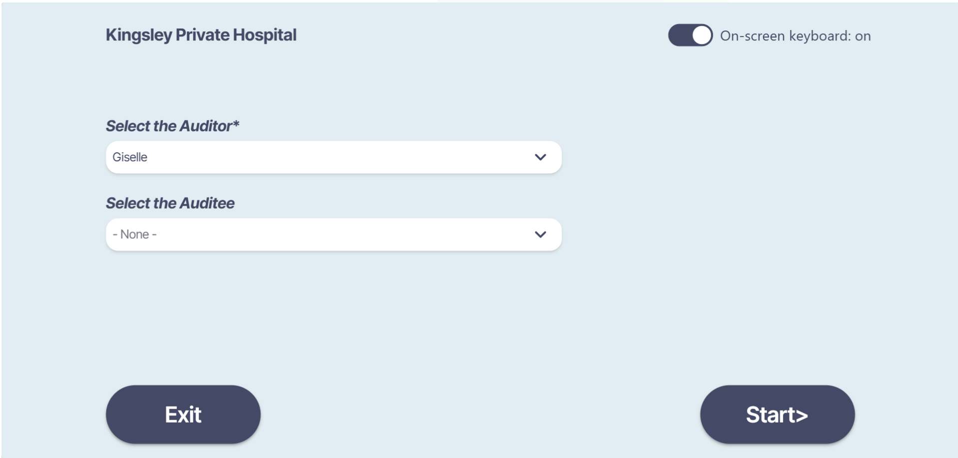
1. Click **Tablet audits** on the **Audit Schedule** page



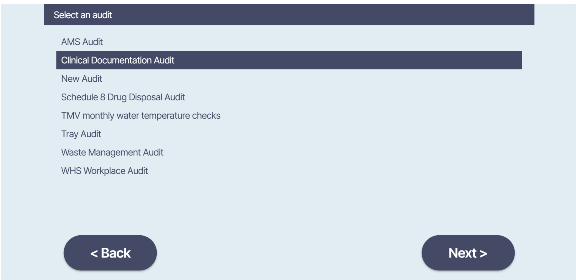
You can also find Tablet Audits via the Side Navigation Panel > Governance > Tablet Audits



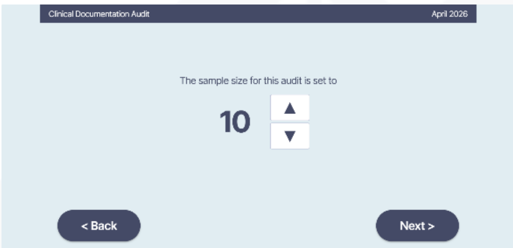
2. The following screen will appear > select the **Auditor** (mandatory) and Auditee (optional), click **Start>**

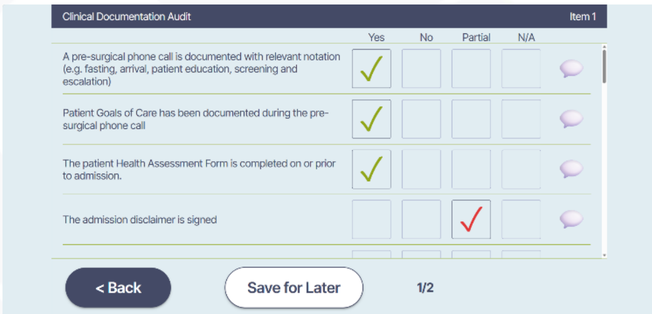


3. Select an **audit** from those listed, click Next> select the **month**, click **Next>**

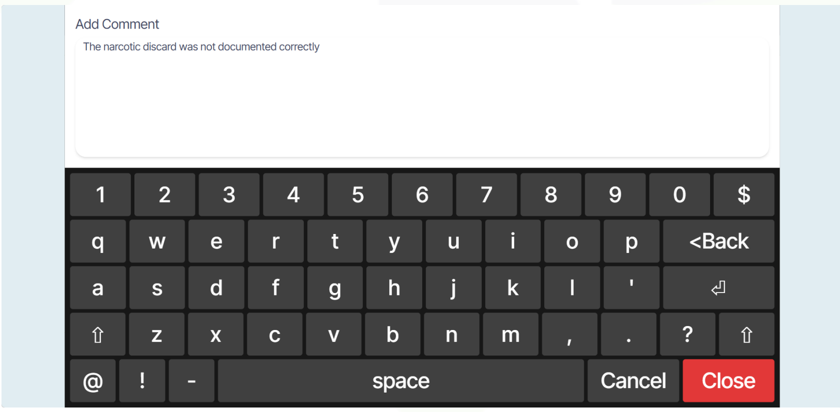


4. The **audit sample size** is displayed and can be adjusted up or down where necessary, click **Next>** and proceed with **completing the audit questions**

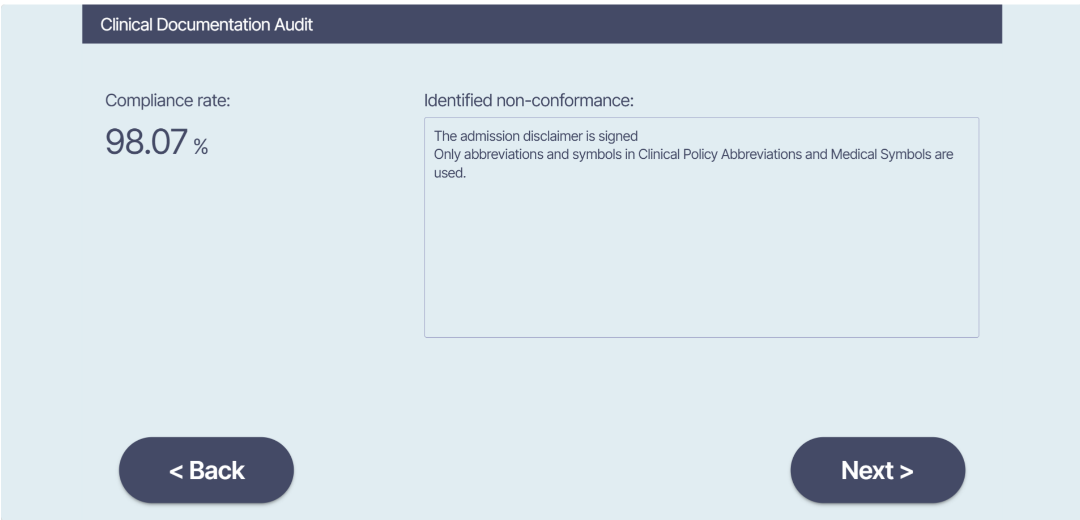




You can add **comments** to each of the questions by **clicking**  and adding your **response.**

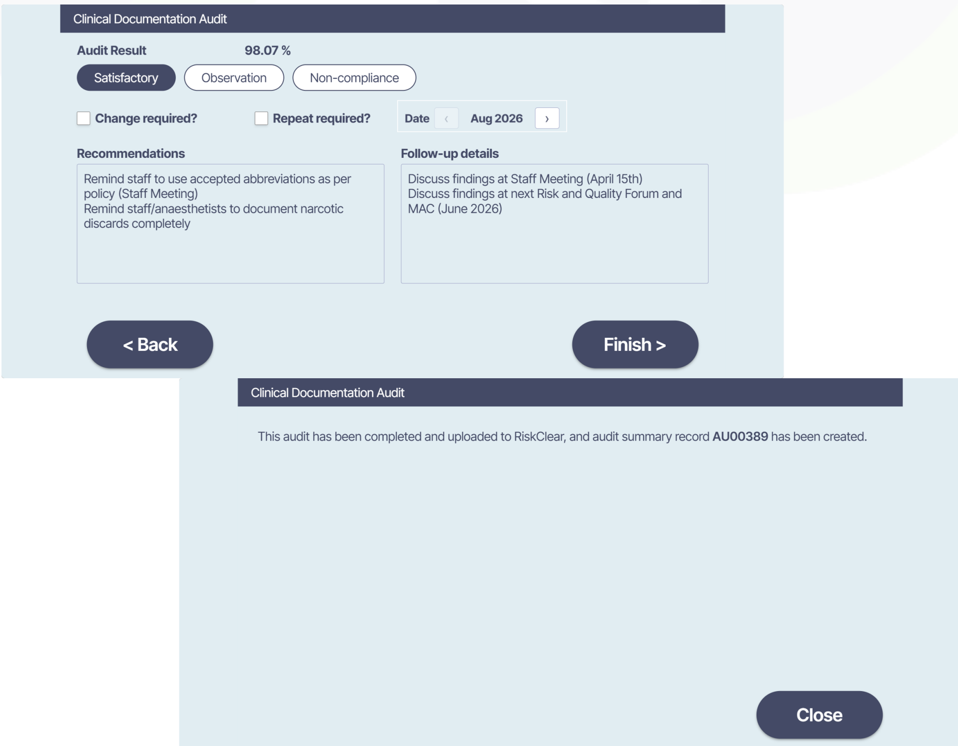


5. Once all audit questions are completed the compliance rate and any **non-conformances** will be displayed

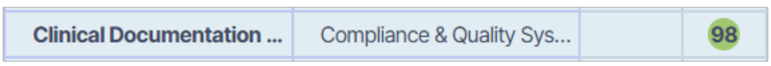


6. The **Audit Result** will appear and you can select whether it is **Satisfactory, for Observation or Non-Compliance.** You can also determine whether there is **Change required** and/or **Repeat (audit) required. Ticking** this box will allow you to choose a repeat **date.**

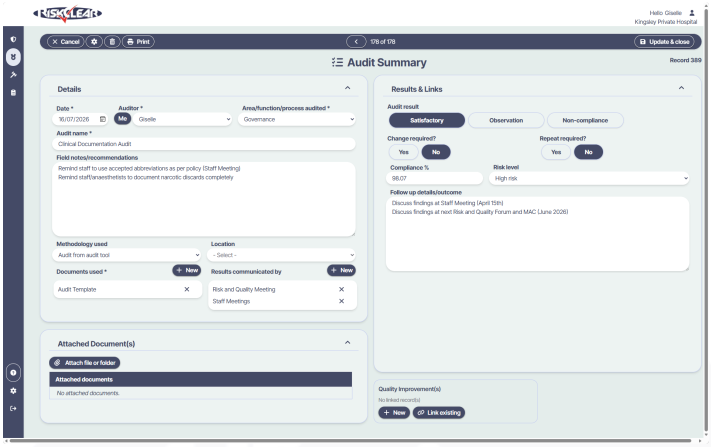
   Click **Finish>** and the final screen confirming the **Audit Summary Record** creation will appear.



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



The **Audit Summary** can be found via the **Side Navigation Panel** > **Search Quality > Audit Summaries** and clicking on the record.



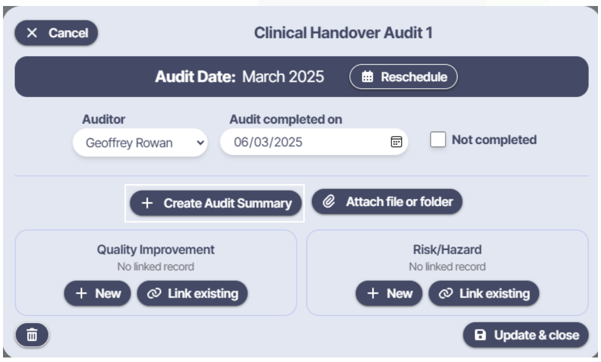
COMPLETING A SCHEDULED AUDIT/CHECKLIST/TASK

COMPLETING AN AUDIT (PAPER-BASED)

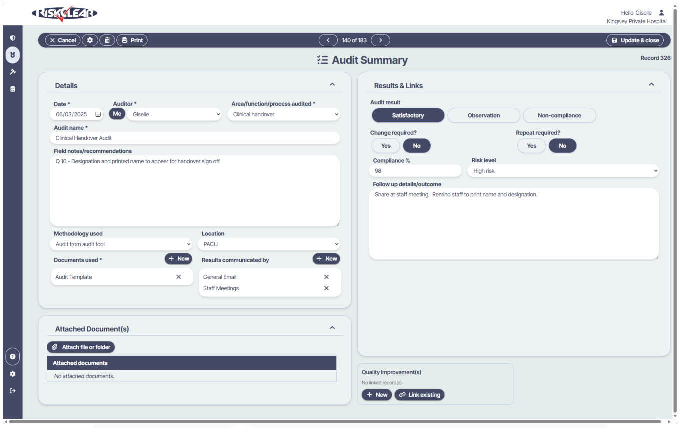
Click on the scheduled Audit for that month from the Audit/Task Schedule > e.g. Clinical Handover Audit (March).

			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)

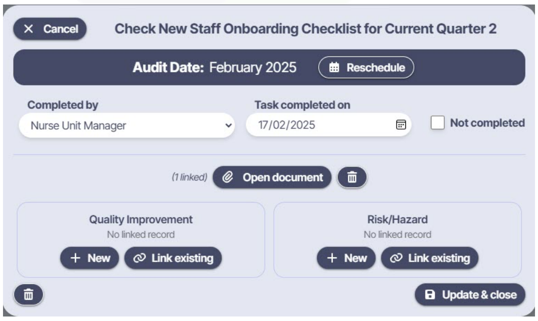


4. **Attach** supporting evidence (e.g. the completed paper-based audit template)
5. **Create or link** a **Quality Improvement** and/or **Risk/Hazard** record where required
6. Click **Update & Close**

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	✗	✗	✗	✗

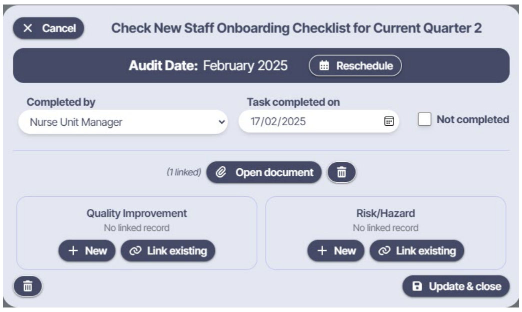


Checklist completion follows the same process as an Audit. Enter the **Completed by** details, **Compliance Rate** and **Checklist** completed on **date**. **Supporting evidence** can be attached and **Quality Improvement or Risk/Hazard records created or linked** before selecting **Update & Close.**

COMPLETING A TASK

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

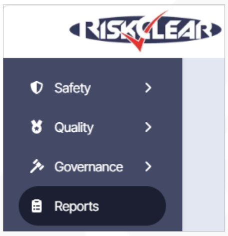
	Title	Owner	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
T	**Performance Appraisal ...	Director of Nursing		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	🕓	✓	✓	✗	✗	✗

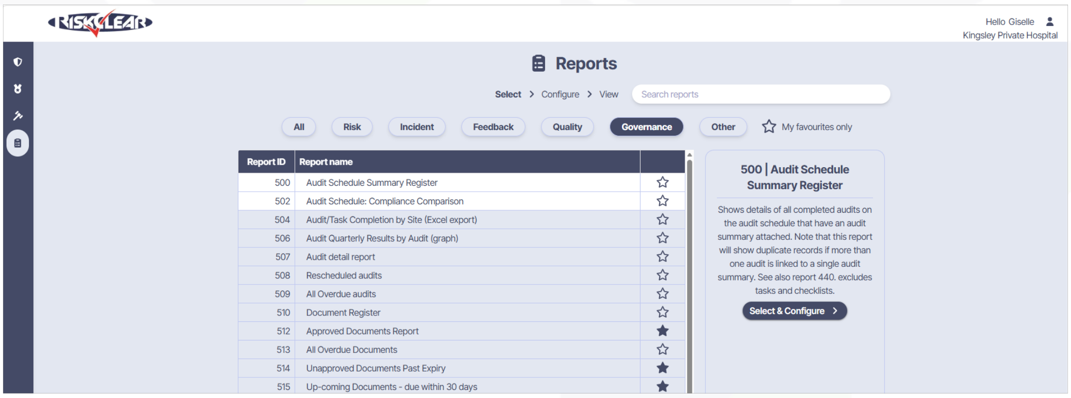


Tasks are completed in the same manner. Record **who completed** the task, enter the **completion date**, **attach supporting evidence** where appropriate, **link Quality Improvement or Risk/Hazard** records if required, then select **Update & Close**.

AUDIT REPORTS

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





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.