

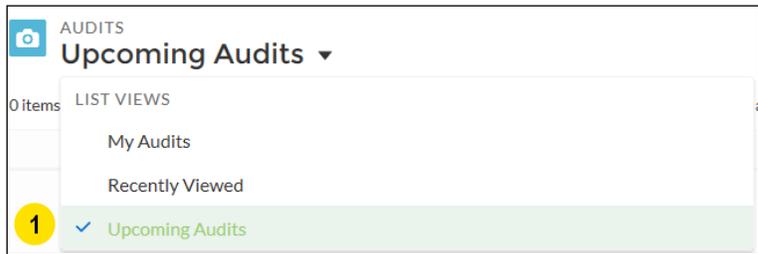
# Managing your audit

In this guide, you will learn how to accept/decline audit dates, how to cancel/reschedule an audit and also uploading your audit preparation documents.

## How do I know my audit is due?

When your audit is due, you will receive an email to inform you that your audit is coming up. To find your audit, look under the **'audits'** tab. You will see you have a drop down with your required options. This being **'My Audits'**, **'Recent audits'** and **'Upcoming audits'**. You then have an option to choose your audit and start

1



## How do I select the audit date?

Once the Auditor has suggested up to 5 dates, you will have the option to either choose one of the 5 dates.

1

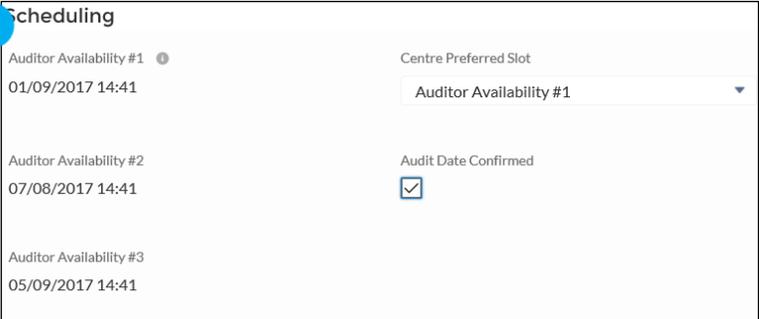
To start, you press **'Edit'** in the top right, this then gives you the option to choose a date.

2

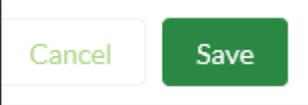
Go down to the **'Scheduling'** tab. You will find the 5 dates. On the right, you have a drop box. Click the preferred date and click the **'Audit Date Confirmed'** tick box.

3

To confirm this, click the **'Save'** button in the bottom right



3



After pressing **'Save'**, this will then send the suggested audit date to the Auditor.

## What happens if I am unable to make an audit?

1 If you're unable to make an audit date, you will have a chance to reschedule/cancel an audit. You can do this by clicking on the related tab while being on the audit



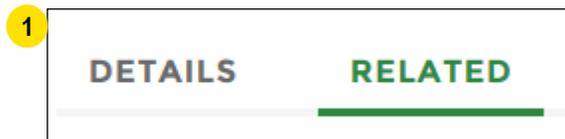
2 You will then have to go down to the 'Audit Cancellations' tab. Once you get to this, your next step is to press 'new'



3 You will then have the option to put a reason as to why you're cancelling the audit. Once this is complete, press save. This will inform the Auditor that you're unable to make the audit.

## What to do once the audit date is selected?

1 Once your audit date has been accepted, your next step is to upload documents. You will find the list you're required to upload under the 'Documents' tab. You will again be required to go onto the 'Related' tab.



2 Once this has been selected, you will have to go to the 'Notes & Attachments' tab. Press 'Upload Files' and selected the required documents.



3 Once this has been complete, go back onto the details tab, (Step 1) press edit and tick the tick boxes you have uploaded. When you have ticked the documents you have uploaded, the next step is to click the 'Audit Document Uploaded' tickbox.

Once this is complete, click 'Save'

