1. Introduction

This guide is for Managers, Supervisors, Health and Safety Representatives and any other relevant workers to help navigate the functions used to conduct online health and safety checklists and inspections at Curtin University.

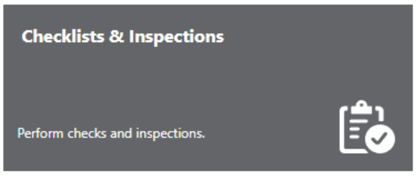
For instructions on how to conduct a Checklist/Inspection on an iPad, please refer to the *CHARM PocketAudit Guide.*

2. How to Log In - Desktop

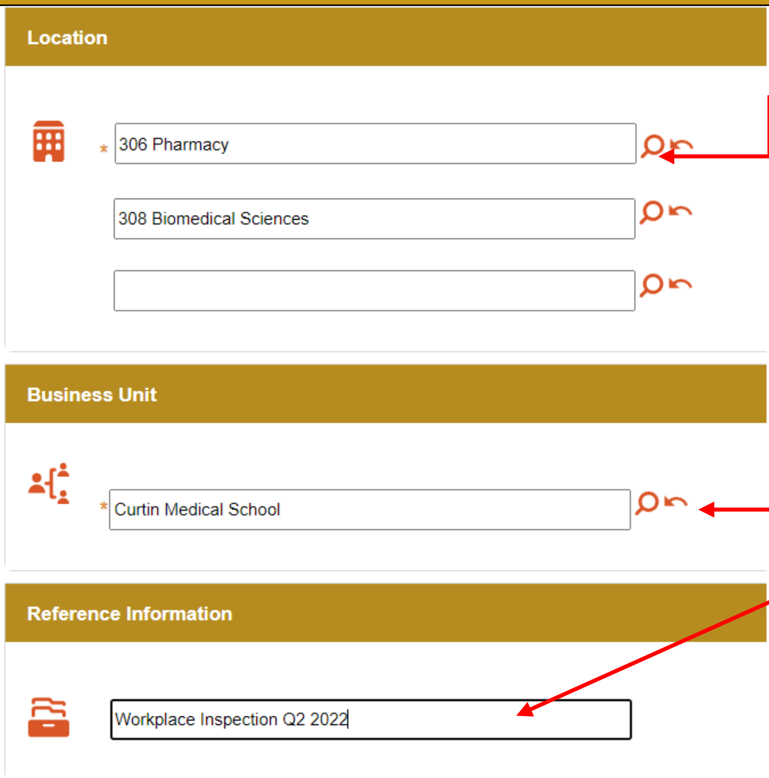
1. Log into the Staff Portal
2. Click on the right arrow of the application wheel
3. Click on the CHARM icon to access the system

3. Checklists & Inspections - Desktop

4. From the homepage click on the Checklists and Inspections icon
5. From the Checklists & Inspections Library page, select the Checklist/Inspection you wish to complete.



4. Conducting an Checklist/ Inspection

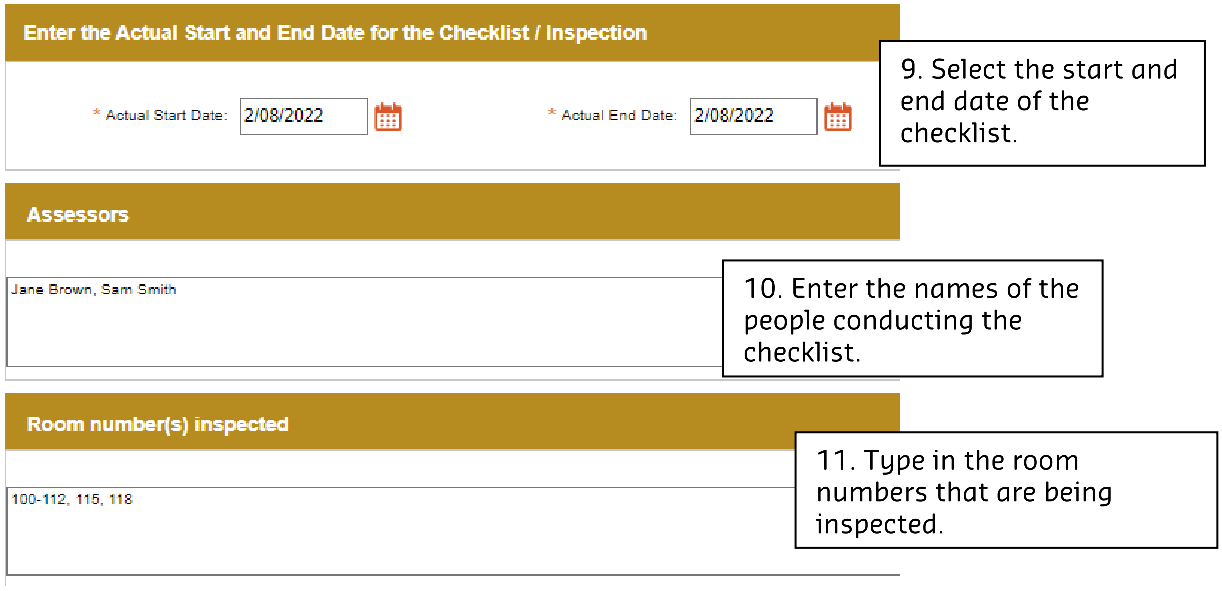


6. Click on the Magnifying glass icons to select the **Location**(s) and **Business Unit** that you are conducting the Checklist.

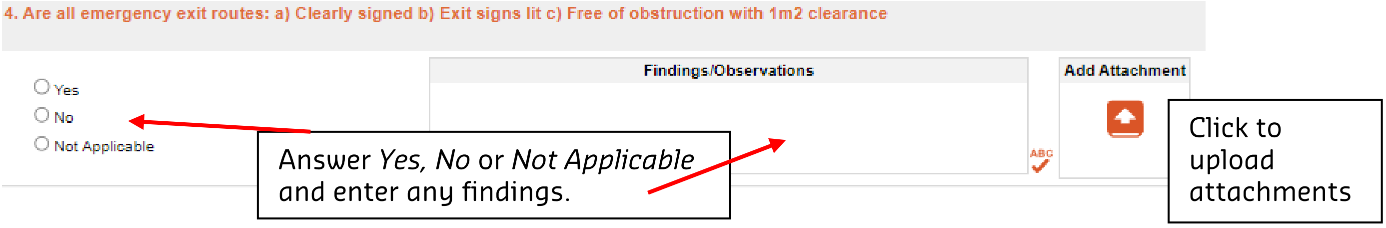
Note: Multiple building locations can be added.

7. Enter information to assist identifying it on the Audit Register once completed.
E.g. Q3 Workplace Inspection

8. Click the Next button located at the top of the page.



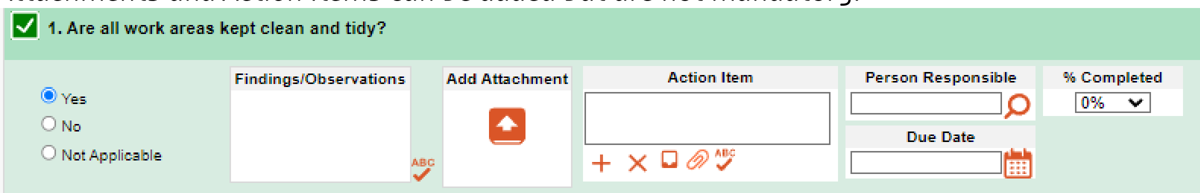
12. Complete the Checklist/Inspection by answering all questions.



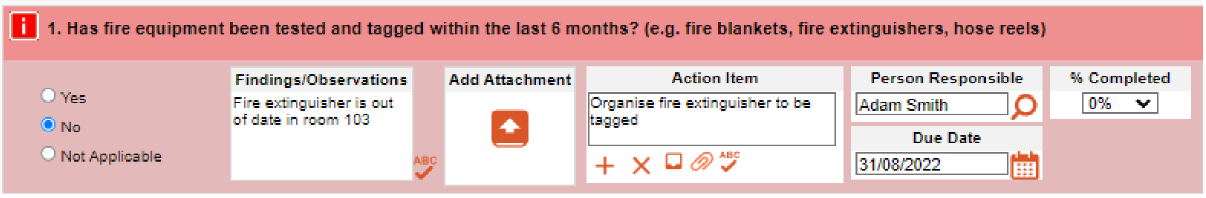
Answer types

There are three answer types available on the Checklists/Inspections that require different mandatory information in order to proceed.

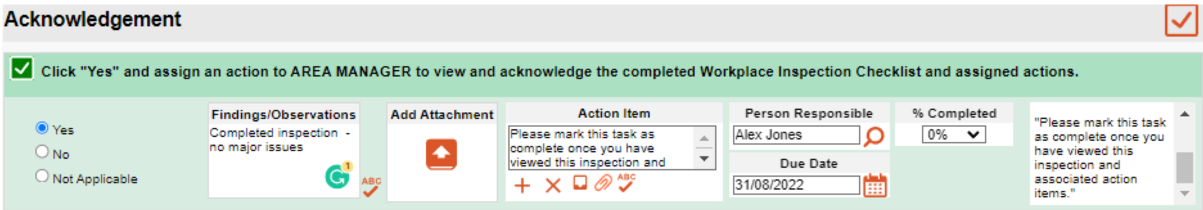
Questions answered with Yes: No further action is required however *Findings/Observations, Attachments* and *Action Items* can be added but are not mandatory.



Questions answered with No: Non-compliance occurred.
The *Findings/observations* section must be completed and at least one *Action Item* assigned to a *Person Responsible* with a *Due Date.*
Note: Please provide detailed information related to the findings/observations in the Action item field so the action owner is aware of what action/s need to be undertaken.



Questions answered with Not Applicable: No action available. If a skip button appears you can click on the blue skip button to skip the section of questions that are not applicable.



13. At the end of the checklist in the **Acknowledgement** section, click Yes and enter any further notes in the Findings/Observations section.

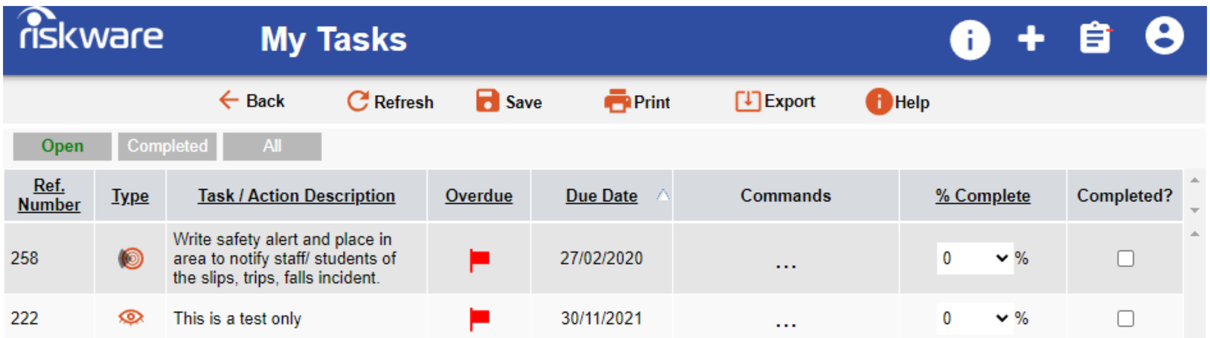
Assign an action item to the Manager responsible for the area you are inspecting so they can view and acknowledge your inspection and identified actions.

14. Once completed, press the submit button located at the top of the page.

Once submitted, this will send an email to the Manager listed in step 13. who will need to view the inspection and mark the action as completed to acknowledge they have viewed the inspection.

Once all questions have been answered, click on the Submit button  to submit the Checklist/Inspection. Once submitted, **Action Items** will be assigned and emailed to the **Person** Responsible to complete. (See section 1.5 for completing tasks/action items)

5. Viewing and Completing Action Items



Actions items (Tasks) assigned to you will be located in the My Tasks section by clicking the Notepad  icon at the top of any page.

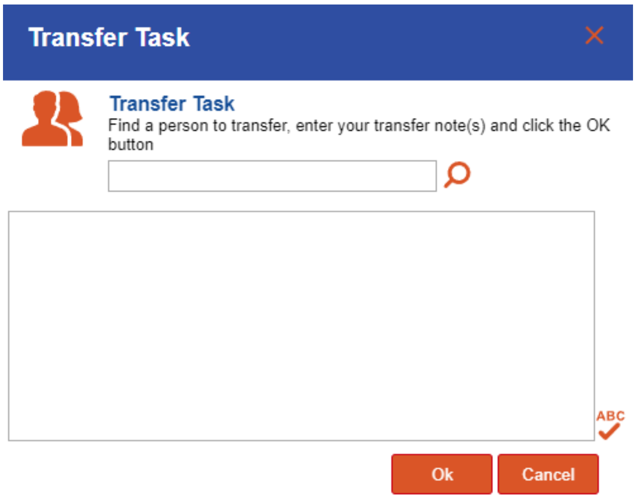
From the **My Tasks** section you can view all, open and completed actions that have been assigned to you.

Double click the action to view the Checklist/ Inspection where the action item was created.

To complete an Action Item / Task

1. From the **My Tasks** section, click on the "Open" tab to view all of your open actions.
2. Change the progress of the action by using the drop down % box to select a percentage.

3. Click on the **...** command and select Note to add notes relating to the progress of the action.
4. Once an action is completed, click the Completed? checkbox and then **Save**
5. The completed action will then appear in the "Completed" tab.



To transfer a task to another person, click on the **...** Commands icon and select transfer. A Transfer Task pop up box will appear.

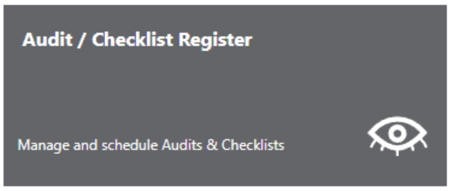
Use the icon to perform a staff search and select the person to transfer the task to.

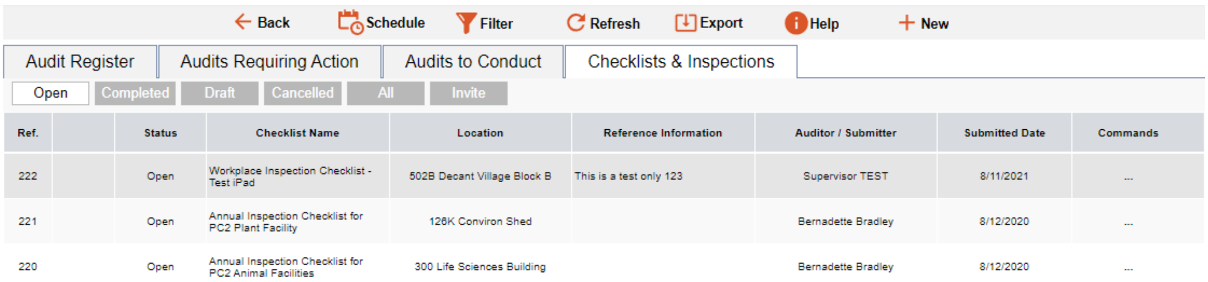
Use the free text box to type your message to the transferred tasks person and click OK.

6. Viewing Completed Inspections

To view your completed Checklists/Inspections go to the CHARM home page and click on the **Audit Register**.

From the **Audit Register**, click on the **Checklists and Inspections** tab.





Checklists and Inspections will remain in the **Open** tab until all action items associated with the Checklist/Inspection have been completed.

Once all action items have been completed, the Checklist/Inspection will be completed and appear in the **Completed** tab.

Incomplete Checklists/Inspections that have been saved as a draft and have not been submitted will appear in the **Draft** tab.

Checklists/Inspections can be cancelled by clicking on the **...** commands button and selecting Cancel Checklist/inspection. The inspection will then appear the **Cancelled** tab.