1. Introduction

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

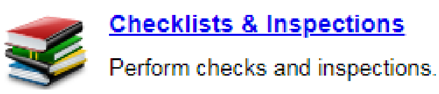
For instructions on how to conduct a Checklist/Inspection on an iPad, please refer to the *C.H.A.R.M. PocketAudit Guide.*

2. How to Log In - Desktop

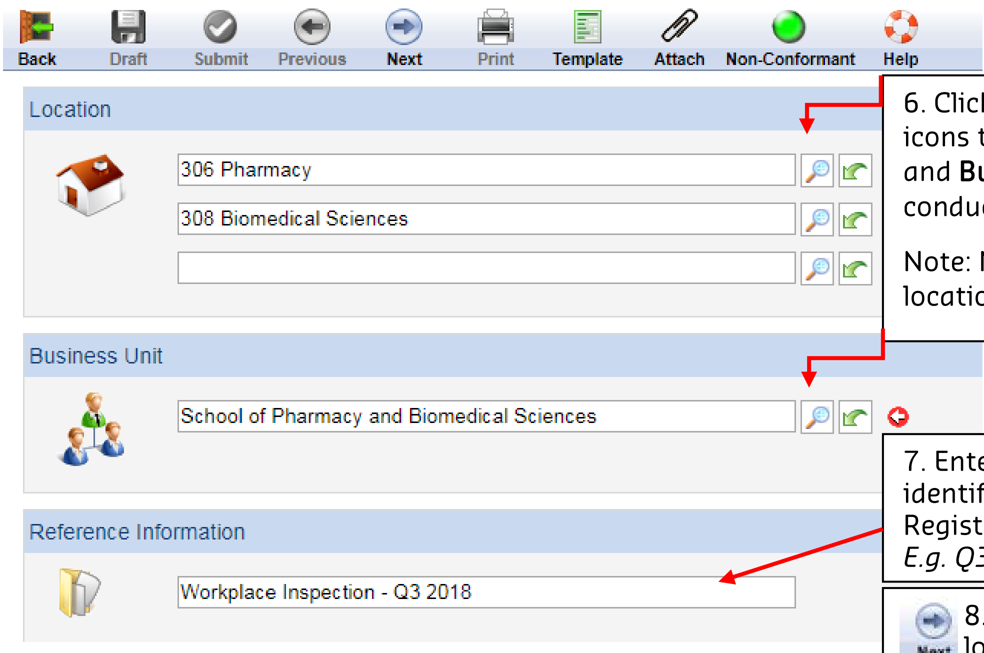
1. Log into the Staff Portal
2. Click on the right arrow of the application wheel
3. Click on the C.H.A.R.M icon to access the system

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

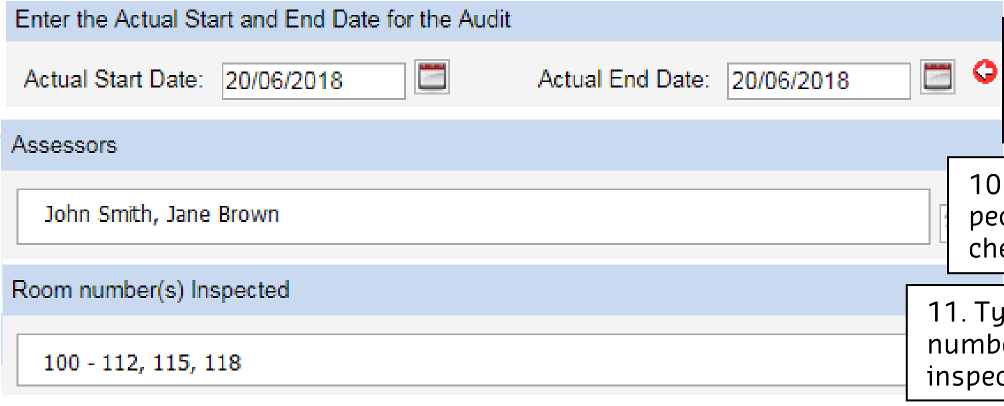


6. Click on the Magnifying glass icons to select the **Location**(s) and **Business Unit** that you are conducting the Checklist.

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.

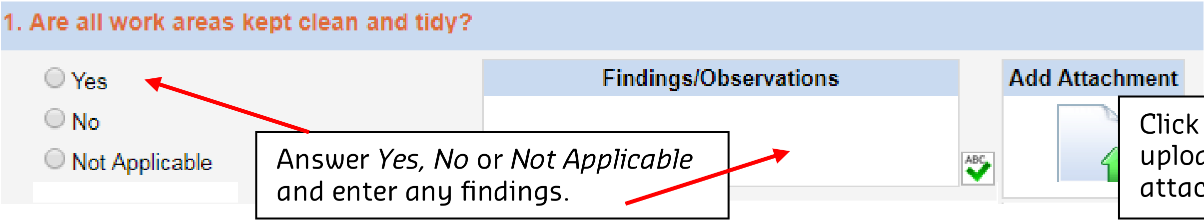


9. Select the start and end date of the checklist.

10. Enter the names of the people conducting the checklist.

11. Type in the room numbers that are being inspected.

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



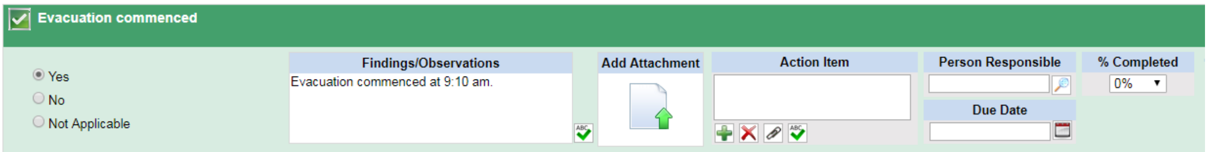
Answer *Yes*, *No* or *Not Applicable* and enter any findings.

Click to upload attachments

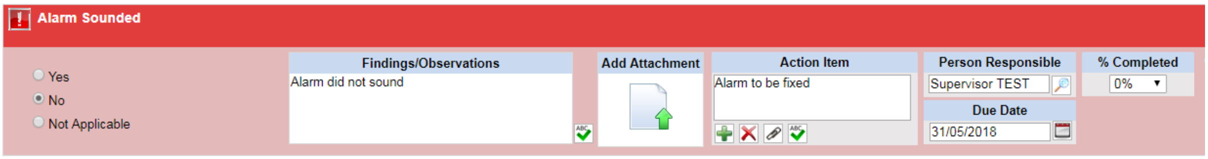
Answer types

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

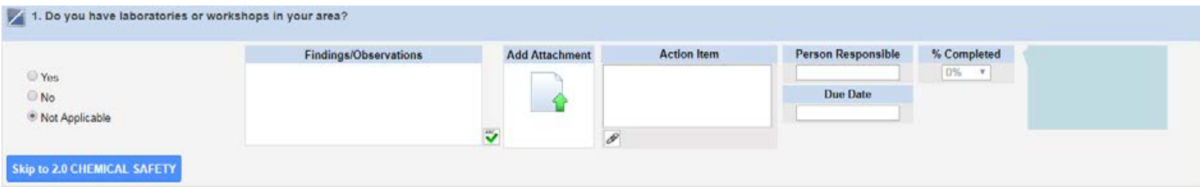
Questions answered with Yes: No further action is required however *Findings/Observations*, *Attachments* and *Action Items* can be added but are not mandatory.

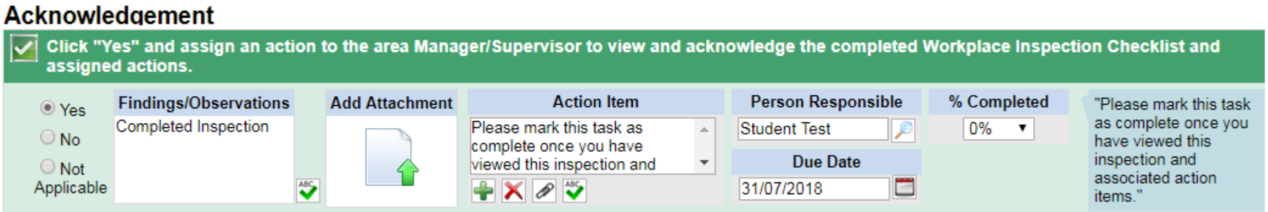


Questions answered with No: Non-compliance occurred.
The *Findings/observations* section must be completed and at least one *Action Item* assigned to a *Person Responsible* with a *Due Date*.



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.





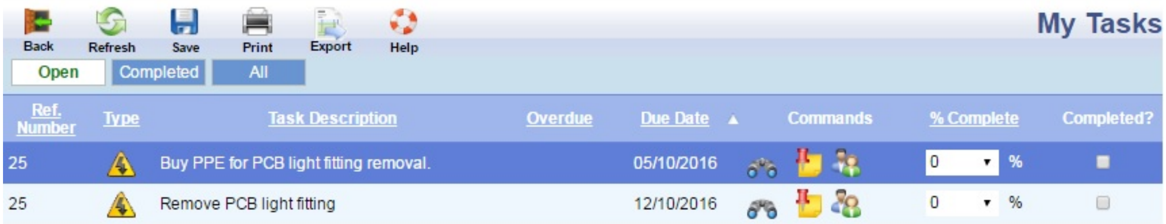
13. At the end of the checklist in the **Acknowledgement** section, click Yes and enter any further notes in the Findings/Observations section.

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 pa Submit

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

5. Viewing and Completing Action Items

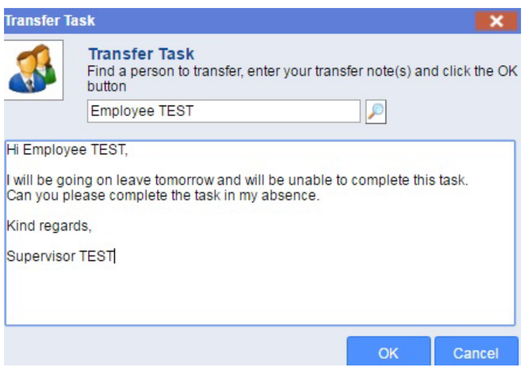


Actions items (Tasks) assigned to you will be located in the **"My Tasks"** section by clicking the My Tasks (1) icon located at the top of any page in C.H.A.R.M. From the **My Tasks** section you can view all, open and completed actions that have been assigned to you.

Click on the icon 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 post it note icon 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 (action) to another person, click on the icon and a Transfer Task pop up box will appear.

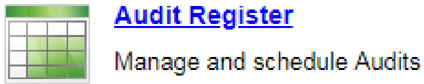
Use the icon to perform a staff search and select the person to transfer the task to.

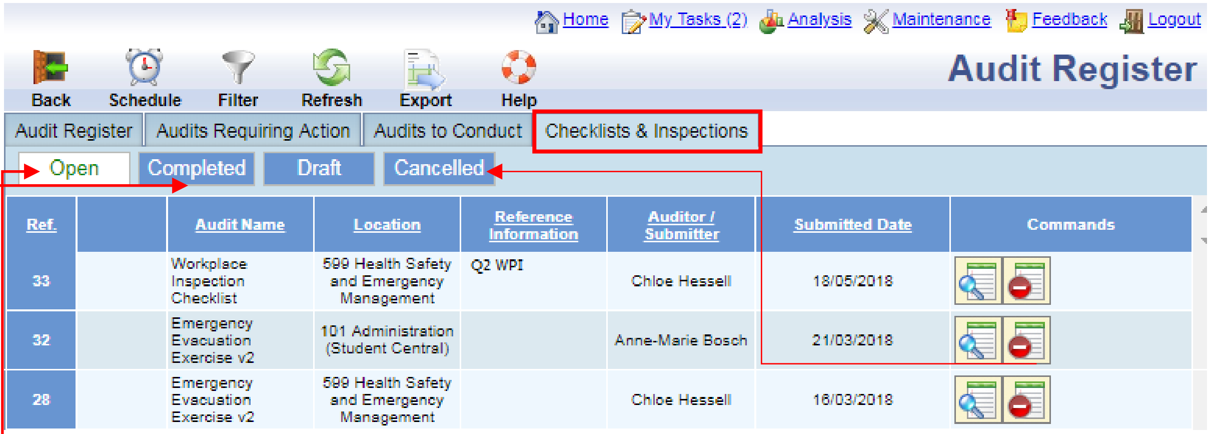
Use the free text box to type your message to the transferred tasks person and click **OK**. An email will be sent to the transferred person to notify them of the task transfer.

6. Viewing Completed Inspections

To view your completed Checklists/Inspections go to the home page by clicking on the 

button located at the top of the page.

Access the **Audit Register** by clicking on the Audit Register icon 



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 not been submitted will appear in the **Draft** tab.

Checklists/Inspections can be cancelled by clicking on the cancelled button where they will appear in the **Cancelled** tab. 

REVISION HISTORY		
Revision #	**Date**	**Amendment Description**
1	02/07/2018	New Document