The iP Suite

Quality Assurance Audits

How to get started?

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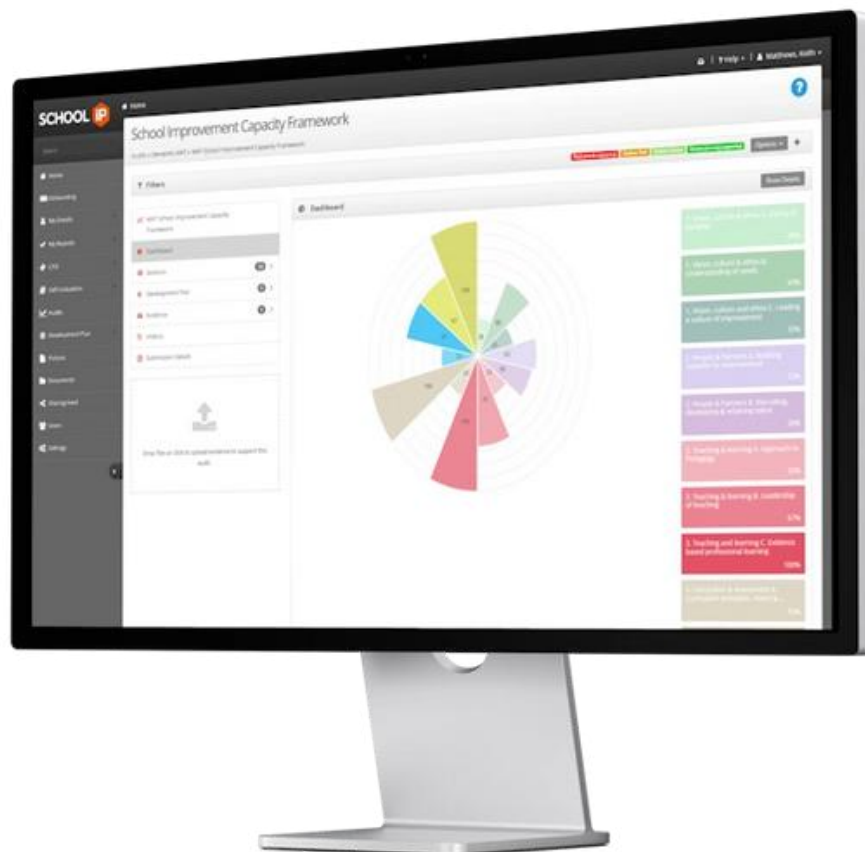
Introduction

The **SchooliP** audit module is a comprehensive and user-friendly platform designed to streamline the audit process and enhance the efficiency of school evaluations. It also offers customizable templates and checklists that align with various auditing standards and frameworks, allowing schools to conduct internal and external audits with ease.
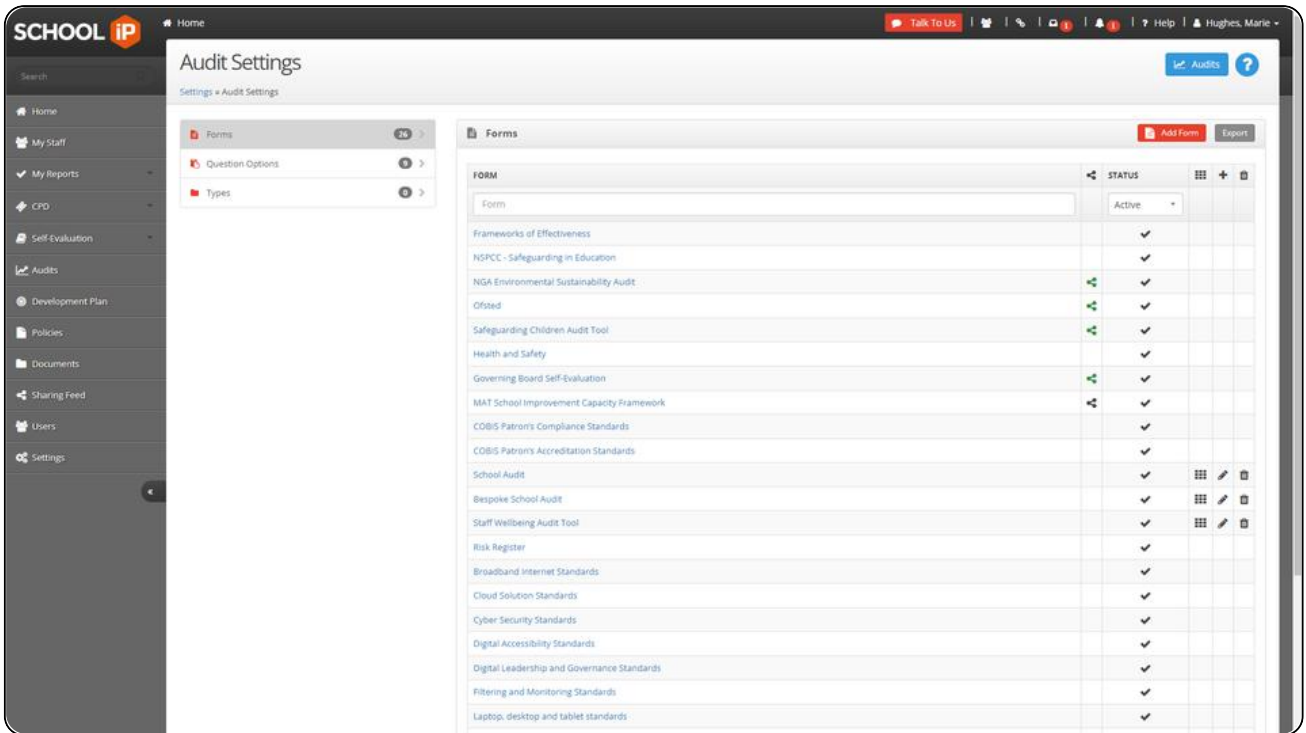
SchooliP enables seamless collaboration among auditors, school administrators, and relevant stakeholders, facilitating the exchange of information, evidence, and progress updates in real-time. It also includes advanced data security features to safeguard sensitive information and ensure compliance with data protection regulations.

SchooliP's reporting and analytics capabilities provide in-depth insights into audit findings, enabling schools to identify areas of excellence and areas needing improvement.

Furthermore, **SchooliP** will support the implementation of action plans based on audit outcomes, allowing schools to monitor progress, track remedial actions, and demonstrate continuous improvement to relevant accrediting bodies and stakeholders.

RISK ASSESSMENT

QUALITY ASSURANCE

HEALTH & SAFETY

SAFEGUARDING

ENVIRONMENTAL SUSTAINABILITY

STAFF WELL-BEING

Settings

Accessing the settings

You can access the Audits settings by clicking Audits in the menu on the left-hand side of the screen. The Audits will now be displayed. To access the settings simply click the "cogs" icon located at the top right of the screen.

NOTE - *If you do not see the "cogs" icon you do not have the right to access the settings. Please see your administrator.*

You may return back to the Audits by clicking the blue "Audits" button at the top right of the screen. This button will toggle between settings and audits.

Amending the settings

The settings that may be changed include:

Forms - an opportunity to add, amend and remove quality assurance audit forms.

Question Options - to specify the question options available to use on the quality assurance forms.

Types - the type of audits e.g. DfE, Trust, School/College.

Adding a new Form

It's simple to get started and create a quality assurance audit. You can start by creating the form to record the audit responses. Select the Audits option from the tree on the left and a view of all Audits will be displayed.

To add a new audit, first you should go to the Settings by clicking the icon at the top right of the screen.

NOTE: if you do not have access to the settings or cannot see the cog icon, please see your system administrator to gain the necessary rights.

From the Settings screen, with the Forms tab selected either click the red button labelled "Add Form" or click the plus icon at the top of the list of forms.

In the resulting dialog, there are four tabs labelled Details, Description, Evidence and Chart.

On the Details tab you will have the option to enter the name of the quality assurance audit and there are five check boxes to further tailor the form.

The five options are:

- **Allow linking to the development plan?** - this will toggle the display of the Development Plan tab on the left of the form, for use when linking/creating activities on the development plan related to this section of the audit.

- **Reset answers to the audit when submitted?** - when the form is submitted all the answers will be reset to the default or all responses cleared.

- **Does the audit need to be submitted?** - indicates whether this form requires submission.

- **Allow the user to create filters for this audit?** - provides the user with the ability to add quick filters for this audit at the top of the view.

- **Share this audit with other schools?** - selecting this option allows for the sharing of this audit with other schools using SchooliP.

On the Description tab, there is a memo field where you can describe the audit that is being added.

The Evidence tab has a tick box which toggles the display of the Evidence tab when viewing/responding to the audit. There is an additional memo field where the user can type in some text or notes which are displayed at the top of the Evidence tab. An additional check box is displayed with the option to "Hide the evidence grid if no evidence has been provided".

On the Chart tab, there are three Chart options;

- **Force Details** - displays the details view of the chart.

- **Force Overview** - displays the overview view of the chart.

- **Allow User to Select** - displays a button which allows the user to toggle between Details and Overview options.

On the chart tab there are two memo fields where text may be typed. The text from the first memo field is displayed above the chart on the dashboard tab to explain its use.

The second memo field text is displayed on the dashboard tab if no questions have yet been answered.

To add the new audit form click the Save button. Clicking the Close button will attempt to discard any changes made to the form.
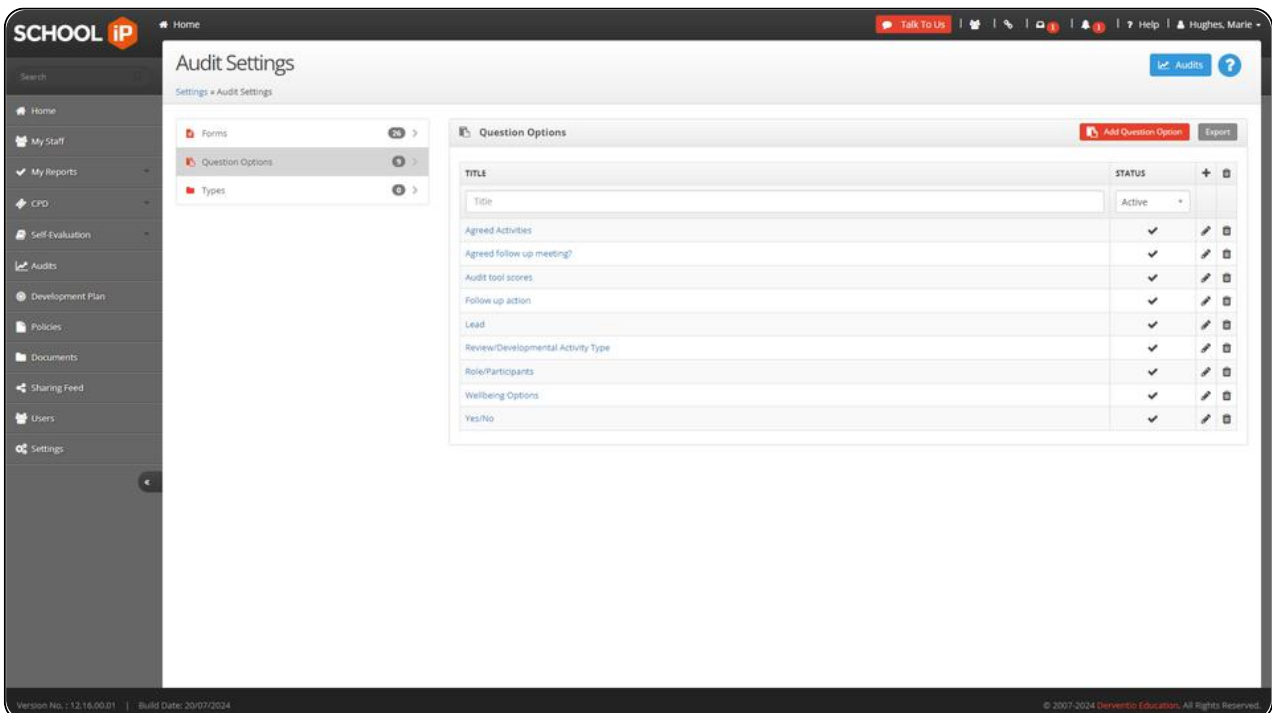
Adding Question Options

A Question Option is a way of responding to the questions on your audit. An example of a question option could be a simple Yes/No or True/False response.

To add a new question option, first you should go to the Settings by clicking the cog icon 🗘 at the top right of the screen.

NOTE: if you do not have access to the settings or cannot see the cog icon, please see your system administrator to gain the necessary rights.
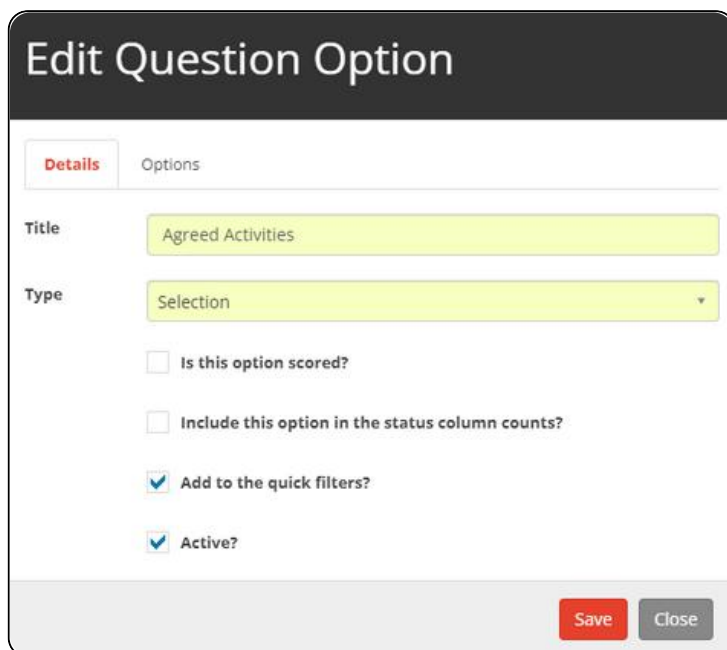
From the Settings screen, with the Question Options tab selected either click the red button labelled "Add Question Option" or click the plus icon at the top of the list of question options.

In the resulting dialog, there are two tabs labelled Details and Options.

On the Details tab you will have the option to enter the name of the question option and then select the Type from the dropdown.

The two options available are:

- **Selection** - a dropdown list will be used to show the available options for selection.
- **Table** - the available options are displayed in a table.

There are checkboxes too with additional options, detailed below.

- **Is this option scored?** - this option allows a score to be attributed to the various responses.
- **Include this option in the status column counts?** - display this option in the status column counts.
- **Add to the quick filters?** - add this Question Option as a filter at the top of the Audits view.
- **Active?** - determines whether this Question option is displayed or not.

The Options tab has the following:

Update all existing audits with any scoring changes? - Any modifications to the scoring will automatically update all existing audits.
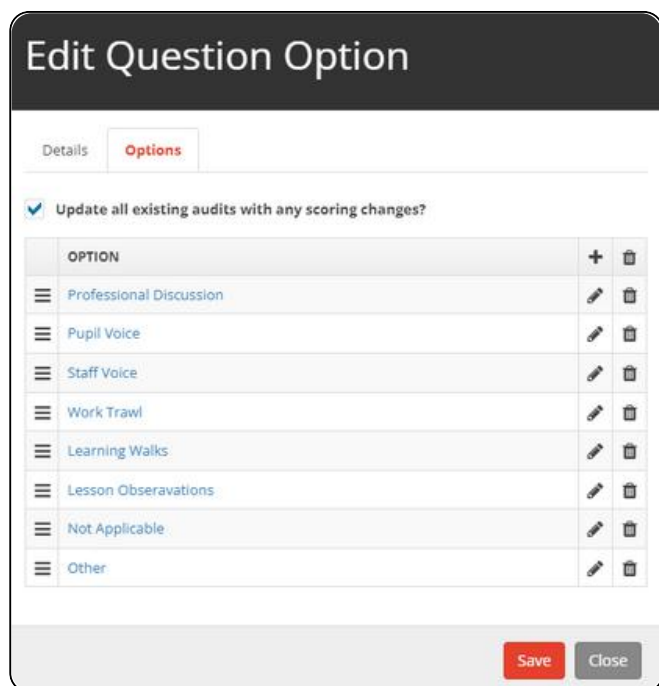
The options view in the dialog above displays all available options. You may reorder these options by clicking the ☰ icon. There are also icons to add ✚ , edit ✎ and remove 🗑 options too.
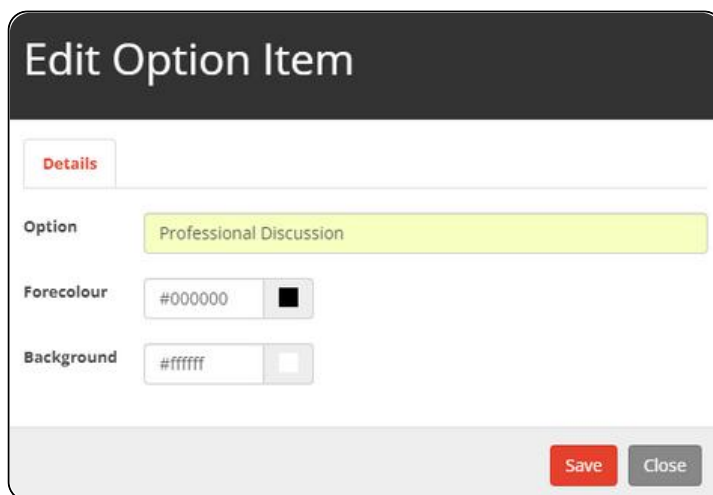
By clicking the Add or Edit icons the following dialog will be displayed.

The Edit Option dialog has three options on the Details tab which may be tailored:

Option - the title or name of the option

Forecolour - the foreground colour of the item

Background - the background colour of the item

Clicking the Save button will save any changes made. Clicking Close will discard any changes.

Adding Questions

When managing the audit form you can also add a series of questions which require a response. To add a question select the red button at the top right labelled "Add Question".

Alternatively, you can click the plus icon at the top right of the questions view.
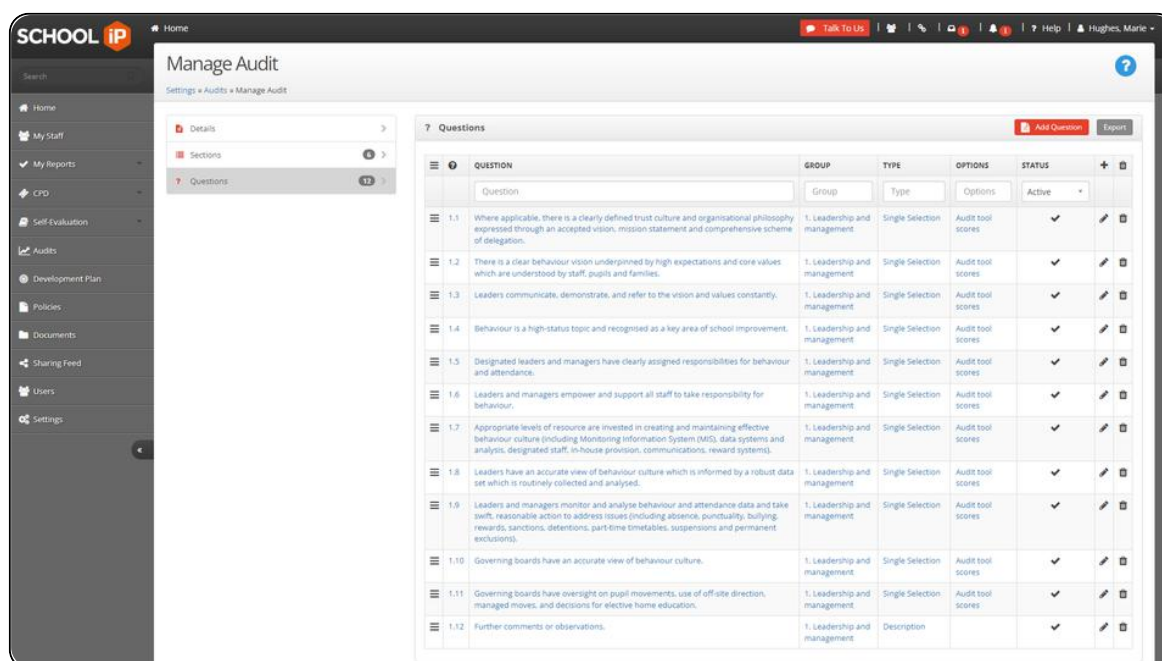
The add/edit question dialog has 5 tabs;

- Details
- Answers
- Guidance
- Settings
- Colour

On the Details tab, you can specify the following options:

Number - the textual number of the question.

Question - the question text.

Group - the group to which the question belongs.

Type - the type of question e.g. Checkbox, Dropdown, etc.

Options - additional question options, which are only applicable to selection-based questions e.g. Dropdown.

Order - the ordering of the question (numerical).

On the Answers tab, you may specify the specific guidance attributed to each of the possible answers. You may also provide a score for each of the possible responses.

On the Guidance tab, there is an opportunity to provide more generalised guidance for this question.
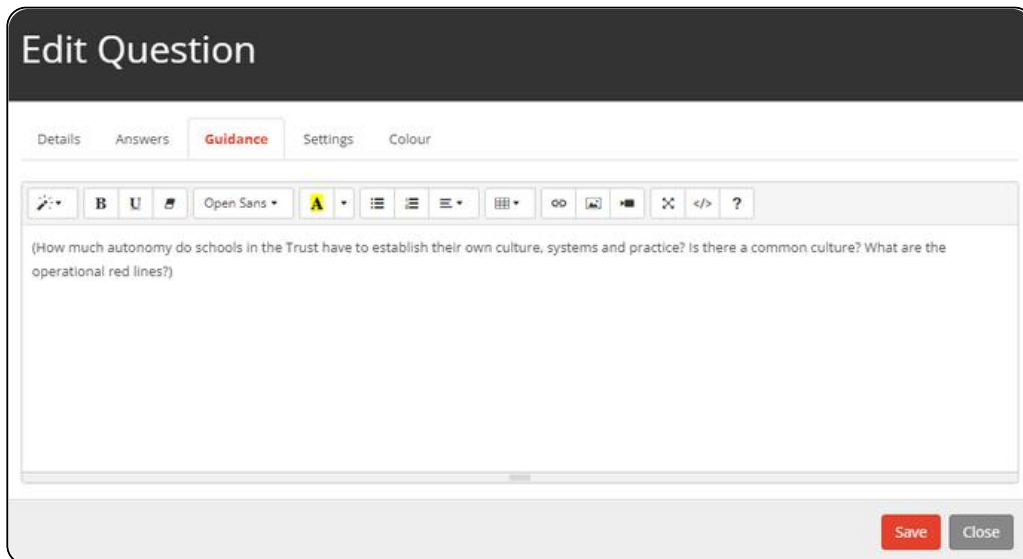

The guidance is then displayed above the question on the audit form and is used to provide further clarity as to how to respond.

On the Settings tab, there are three possible options:

- **Allow all staff to view question?** - indicates whether this question is visible to all staff regarding the roles/rights attributed to specific staff.

- **Allow all key stages?** - indicates whether this question is available to all key stages.

- **Allow comments?** - determines whether comments are allowed for his question.
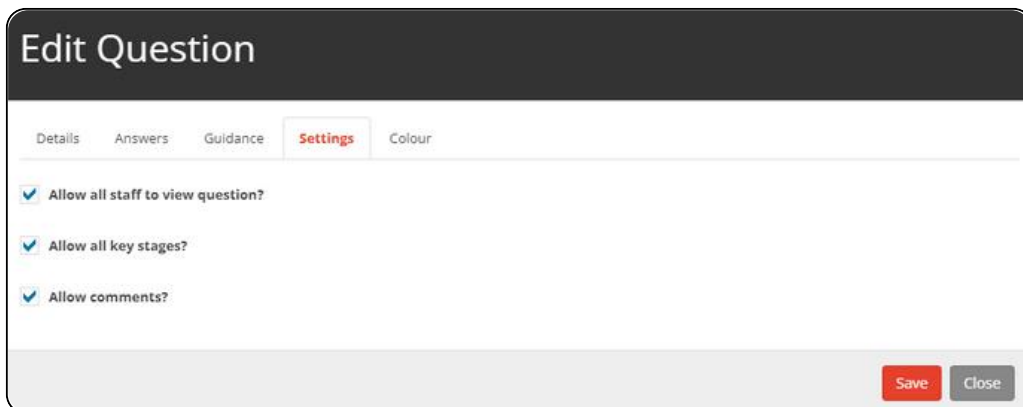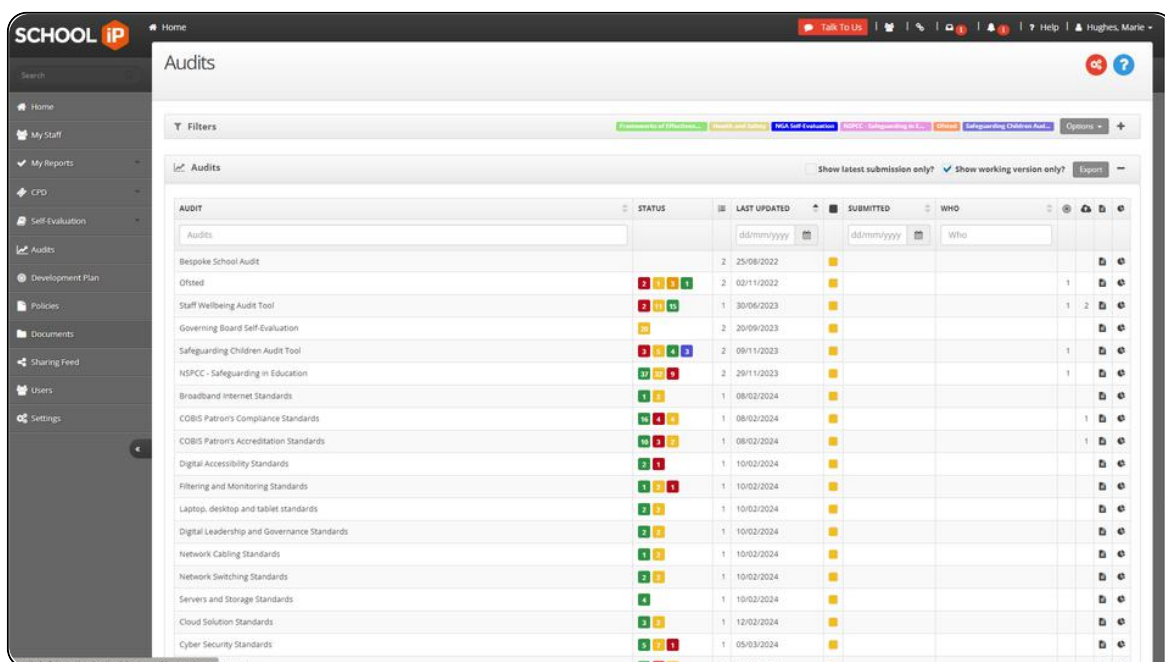
On the Colour tab, there is the option to set the foreground and background colours for the question.
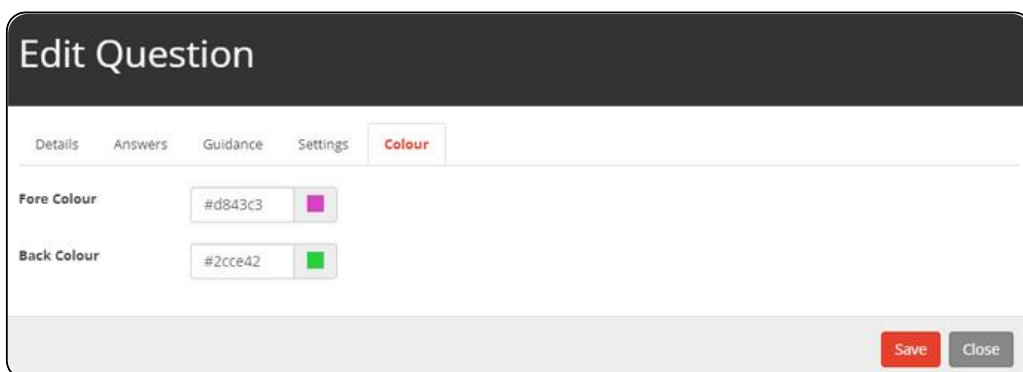
The Audits View

You can access the complete list of available audits by selecting the audits option from the menu on the far left.

The audit view has the following columns of information:

Audit - the name of the audit.

Status - displays the status of each of the questions as a total of each type of response.

**Last Updated** - the date that the audit responses were last updated.

Submitted - the date that the audit was last submitted.

Who - which person was responsible for the submission.

By clicking on the audit a view is displayed which includes five tabs of information:

Audit Name - the name of the audit.

By clicking on the name of the audit the audit form is displayed, showing the questions in a tabular format.
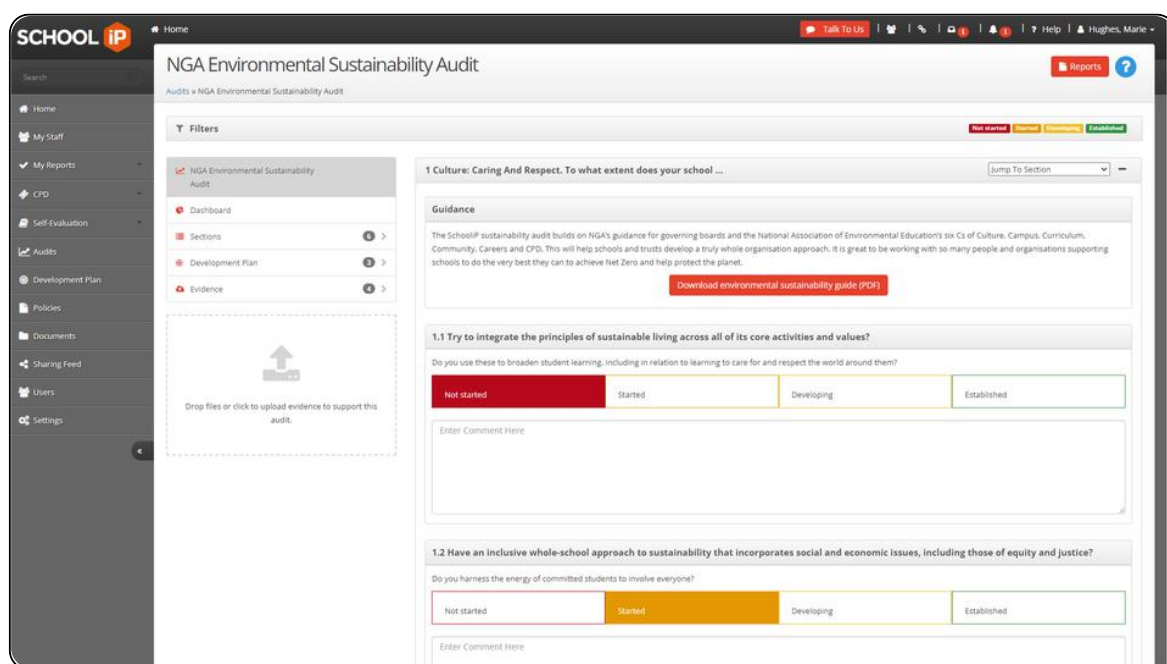

When completing the audit you may type in your responses, or make your selection where appropriate.

With each question the responses are saved each time there is a change.

Quick filters are displayed at the top of the screen and allow you to filter the questions by their status.

Dashboard - the dashboard tab displays a graphical view of the questions on the audit. Each slice of the chart displays the percentage completion of that particular section.
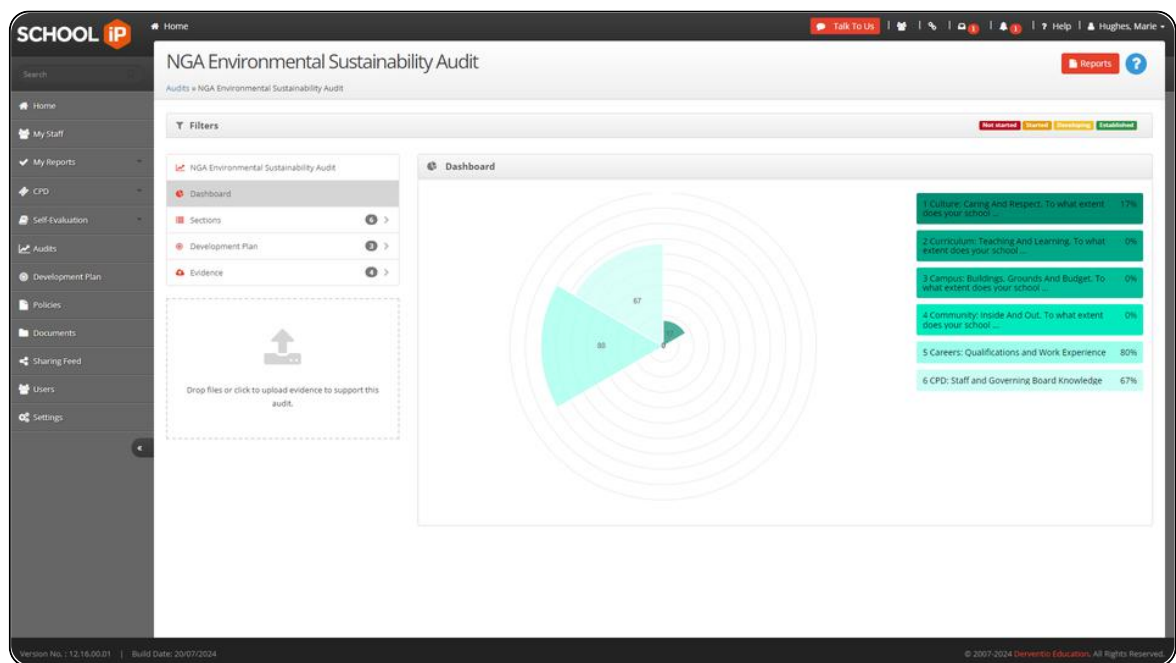

Clicking a slice of the chart will launch the audit and show the questions on the audit as displayed by clicking on the audit name on the left-hand side.

Sections - the sections tab breaks down the audit into its relevant sections. Each section is displayed alongside each a breakdown of the questions at each status.
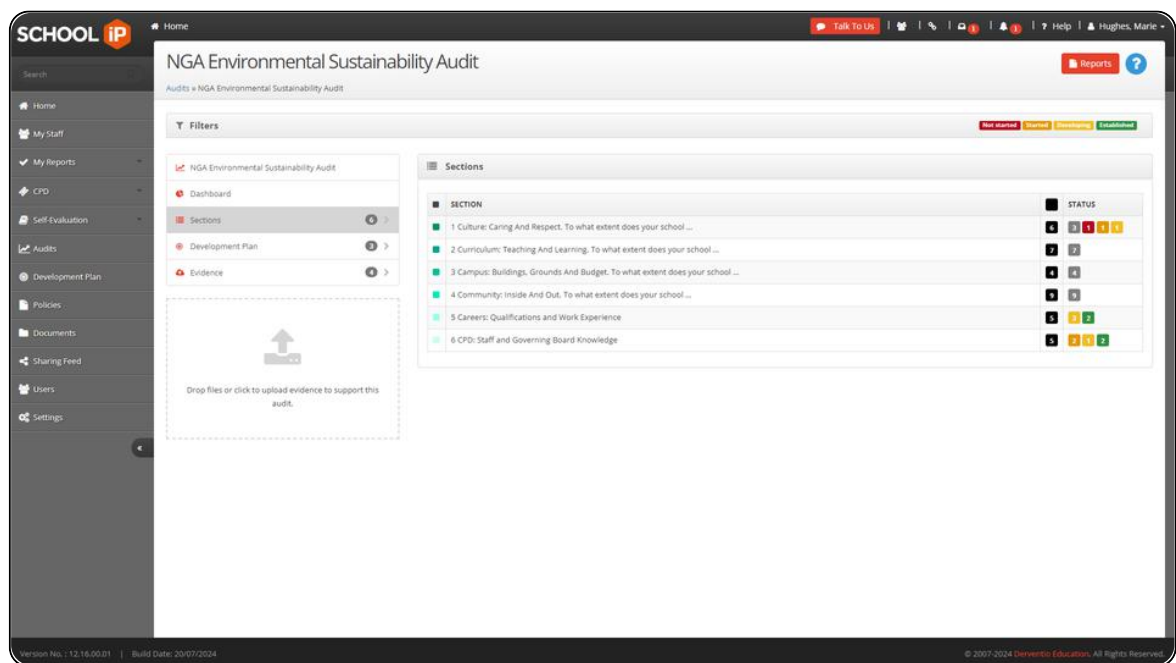
Development Plan - this tab shows the development plan activities which are linked to this audit. These activities highlight the related work which needs to be undertaken as a result of completing the audit and identifying areas for improvement.
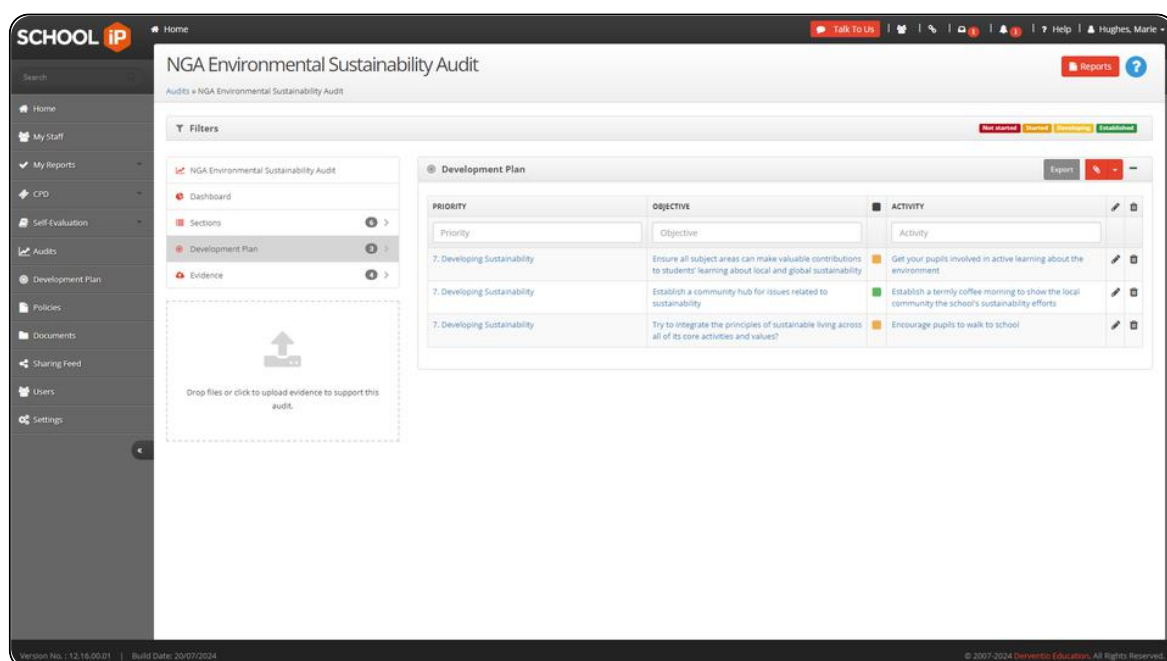

When completing the audit and you identify further work that needs to be completed you may add development plan priorities, objectives or activities or even link to existing development plan activities.

Evidence - there's also the ability to upload evidence files alongside your audit responses.
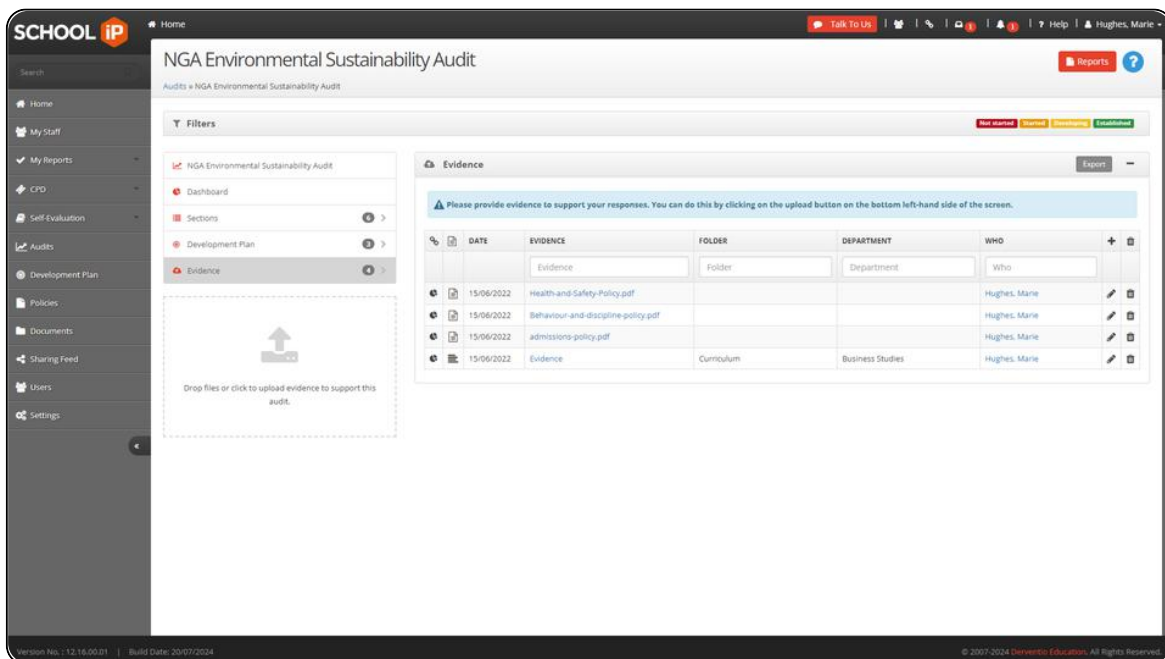
Reporting

Selecting the Reports option will produce a report of the audit, which is available in PDF or HTML format.
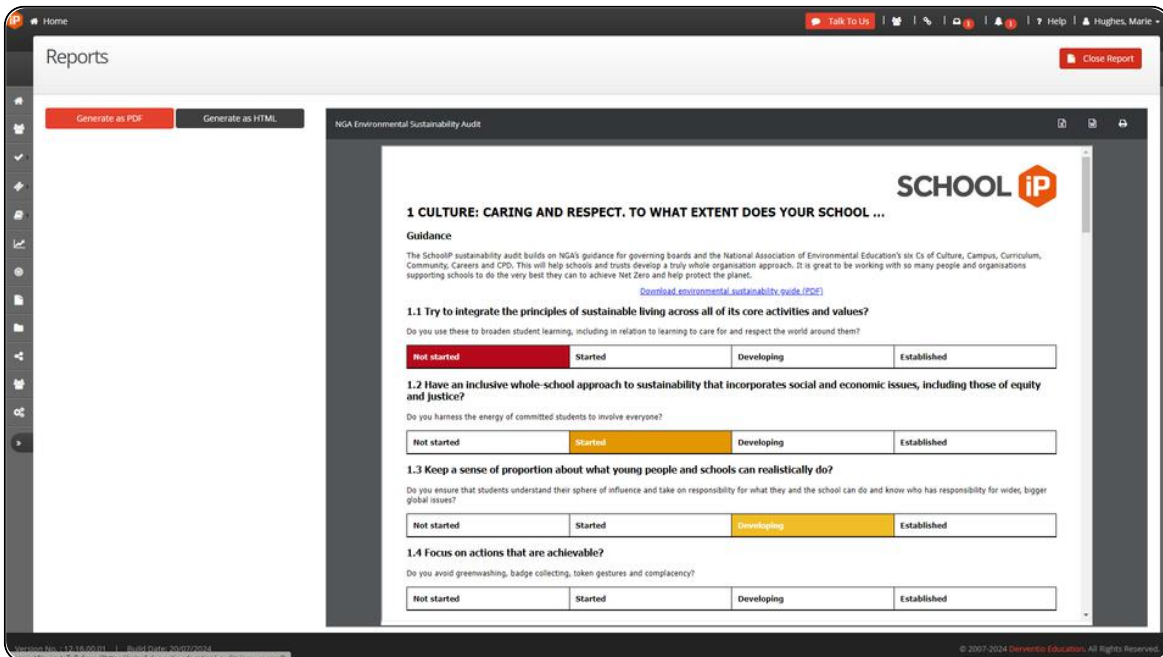
For inquiries, contact us.

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