AuditSoft Tips for Auditors

This user-guide was compiled by the CCSA COR team. This guide contains direct links to AuditSoft Help pages as well as general tips from the COR team. For more information on CCSA-related COR Auditing processes, please visit our website and/or contact the COR team for support at COR@AB-CCSA.ca

[Version 1: May 28, 2024]

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Pre-Audit

1. Getting Started with AuditSoft
    - Guide on getting started with AuditSoft for the first time.

2. Complete the FREE AuditSoft training
    - CCSA Certified Auditors and Candidate Auditors must complete the free AuditSoft training before beginning their audit. Upon completion, please send your Certificate of Completion to COR@AB-CCSA.ca

3. How to Open AuditSoft
    - Guide outlining how to open and launch AuditSoft on your device.

4. Download and install AuditSofft on your device
    - Guide on installing AuditSoft onto your computer, laptop or tablet.
    - Direct link to Microsoft Store download

5. Create a user account on AuditSoft
    - Guide on creating a user account after you have installed the application.

6. Logging into AuditSoft
    - Guide on logging into AuditSoft after the application has been installed and account has been created.

Planning for and Conducting the Audit

7. Certifying Partner Guide (CCSA)

- Guide on registering, submitting, quality assurance reviews, revisions, and providing a copy to the client.

8. Layout

- Guide on starting an audit, and navigating the tool bar, menu and content.

9. Audit Information

- Guide on how to fill in the Audit Information for Company and Audit Details.

10. Scope

- Guide on defining the scope of the audit and where the justification information for the selection of sites to visit and employees to interview are defined.

11. Gathering Evidence

- Overview of the D-I-O process.

12. Review Documentation

- Guide on starting the documentation review.

13. Conduct Interviews

- Guide to starting the interviews.
- NOTE: CCSA requires a cohort breakdown to be entered for any interview question scoring less than 90%; the cohort breakdown fraction can be included within the justification note.

14. Record Observations

- Guide on recording observation tour findings.

15. Question Dependencies

- Guide on scoring and question dependencies.

16. Summary Documents

- Guide on adding supporting documents.
- NOTE: CCSA requires the following attachments to be included with submission: Pre-Audit Letter, Pre-Audit Meeting Minutes, Post-Audit Meeting Minutes, and Organizational Chart(s). NOTE: The Pre- and Post-Audit Meeting Minutes must contain the date of the meeting, start and end time, who was in attendance and what was discussed.

17. Conducting Team/Department Audits

- Guide for conducting team audits, setting them up, distributing the master file, merging audit files, and merge rules.

18. Audit Results

- Guide for entering audit results, navigating elements and the status bar, questions and guidelines, scoring, appending and/or showing comments, question dependencies, and flagging items for follow-up.

19. Attaching and Linking Files

- See Summary Documents to check which attachments the CCSA requires.

20. Is My Audit Complete?

- Guide for identifying whether your audit is complete or incomplete, and what needs to be done to complete it.

21. Outstanding and incomplete items in the navigation menu

- Guide on how to complete any remaining items.

22. Submitting your Audit or Assessment

- Guide on how to submit your audit via the AuditSoft system

Post-Audit

23. The Quality Assurance Review process for auditors

- Post-submission guide on the QA Review process.

24. Save Action Plan

- Post-submission guide on how to create an action plan template for employers to use based on the Suggestions for Improvement outlined in the final audit report.

Can't Find What You're Looking For?

25. Submitting a ticket

- Need help? Submit a support ticket with the AuditSoft team. NOTE: For CCSA-specific COR Auditing processes, please contact COR@AB-CCSA.ca

26. General Troubleshooting

- Use Troubleshooting Solutions Home for additional support.