



LRQA Client Portal: Guide to managing visits



The LRQA online Client Portal gives you access to all your business assurance information to enable you to manage your compliance quickly and easily from anywhere in the world, whenever you want.

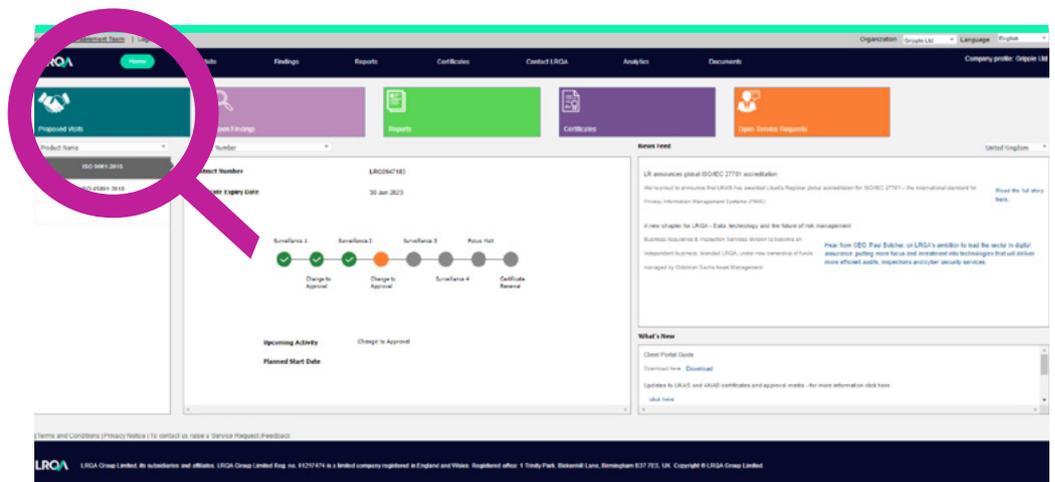
You can see your schedule of audit visits and the status of audit findings – including any non-conformities - and access comprehensive data reports to share with your stakeholders.

If you need to get in touch to schedule audit visits, change dates, ask questions or reply to your audit findings, you can easily contact us through our worldwide customer service teams or online chat function.

Let's get started on managing your visits!

Accessing Visits from the homepage

If your audit is yet to be confirmed, you can access those by clicking on the **Handshake** icon. To view all your visits, please use the **Visits** tab and limit your selection by using the filter option. Your upcoming and completed audit dates will be clearly displayed by sites, products, status and your assessor details.



Visit status

Proposed – you need to confirm or request a date change to LRQA.

Confirmed – you have accepted the audit for the date shown.

Completed/Closed – audit complete.

The screenshot shows the LRQA Client Portal interface. At the top, there is a navigation bar with 'LRQA' logo and menu items: Home, Visits (highlighted), Findings, Reports, Certificates, Contact LRQA, Analytics, and Documents. Below the navigation bar is a search and filter section with dropdown menus for Contract Number, Standards, Country (United Kingdom), City, and Visit Status. A date range filter is set from 15-Nov-2020 to 15-Nov-2024. An 'Analytics' button is visible. The main content is a table of visits. The table has columns: LRQA Reference, Visit Type, Address, Delivery Method, City, Country, Postcode / Zip, Standard(s), Status, Visit Start Date, Visit End Date, Assessment Duration, and Details. A 'Confirm Visit' button is highlighted in a pink box in the 'Details' column of the first row. A pink arrow points to this button from the right.

LRQA Reference	Visit Type	Address	Delivery Method	City	Country	Postcode / Zip	Standard(s)	Status	Visit Start Date	Visit End Date	Assessment Duration	Details
LRQ000001/12345	Surveillance 3	Multiple	Remote - Offsite	Sheffield	United Kingdom	Multiple	ISO 14001:2015	Proposed	03-Oct-2022	04-Oct-2022	2.0 DAYS	Show Details
LRQ000001/12345	Surveillance 2	82 St Omers Road, Hiscott, EX31 6SZ, United Kingdom	Onsite	Sheffield	United Kingdom	S4 7UQ	ISO 14001:2015	Proposed	04-Apr-2022	04-Apr-2022	1.0 DAY	Show

Not sure how to confirm a visit or request a date change for your audit?

It's easy.

Simply click the **Show Details** text and you arrive at this page here.

Now you can confirm the date, or you can even confirm multiple visits using the **Confirm Visit** button.

The screenshot shows a detailed view of a visit in the LRQA Client Portal. The top navigation bar is the same as in the previous screenshot. Below it is a search and filter section. An 'Analytics' button is visible. The main content is a table of visits. The table has columns: LRQA Reference, Visit Type, Address, Delivery Method, City, Country, Postcode / Zip, Standard(s), Status, Visit Start Date, Visit End Date, Assessment Duration, and Details. A 'Confirm Visit' button is highlighted in a pink box in the 'Details' column of the first row. A pink arrow points to this button from the right. Below the table is a section with buttons: Export, Show Notes, Add to Calendar, Add PO Number/View Quotation, and Submit Remote Document(s). Below this is another table with columns: Address, Delivery Method, City, Country, Standards, Visit Type, Assessor, Assessor Role, Status, Visit Start Date, Visit End Date, and Assessment Duration. A 'Confirm Visit' button is highlighted in a pink box in the 'Assessment Duration' column of the first row. A pink arrow points to this button from the left. A 'Propose another visit date(s)' button is highlighted in a pink box in the 'Assessment Duration' column of the first row. A pink arrow points to this button from the right.

LRQA Reference	Visit Type	Address	Delivery Method	City	Country	Postcode / Zip	Standard(s)	Status	Visit Start Date	Visit End Date	Assessment Duration	Details
LRQ000001/12345	Surveillance 3	Multiple	Remote - Offsite	Sheffield	United Kingdom	Multiple	ISO 14001:2015	Proposed	03-Oct-2022	04-Oct-2022	2.0 DAYS	Show Details
LRQ000001/12345	Surveillance 2	82 St Omers Road, Hiscott, EX31 6SZ, United Kingdom	Onsite	Sheffield	United Kingdom	S4 7UQ	ISO 14001:2015	Proposed	04-Apr-2022	04-Apr-2022	1.0 DAY	Hide Details

Address	Delivery Method	City	Country	Standards	Visit Type	Assessor	Assessor Role	Status	Visit Start Date	Visit End Date	Assessment Duration
82 St Omers Road, Hiscott, EX31 6SZ, United Kingdom	Onsite	Hiscott	United Kingdom	ISO 14001:2015	Surveillance 2	Mr John Smith	Team Leader	Proposed	04-Apr-2022	04-Apr-2022	1.0

- Remember, if the dates don't work for you, then click **Propose another visit date(s)** to suggest ones that do.
- Remember, you can **Export** the real-time data at any time to an easy-to-view file for you to share with your stakeholders to keep them updated as to the audit schedule.

Additional details about your visit

Sometimes, we might want to add some additional details about your visit or share some information with you. When we do, you can access this through the **Show Notes** tab.

The **Show Notes** tab brings you to this page. It gives you any additional information in relation to your audit and clearly shows the visit type, products and address.

Job Level Note(s)				
Note(s)		Note Details		
No Job Notes to display.				
Site Level Note(s)				
Visit Type	Standards	Address	Note(s)	Note Details
Surveillance 1	ISO 9001:2015 ISO 14001:2015	20 Park Way	Hi, Both of our assessors will visit you on site in London and all travel costs and time will be charged according to our contract.	

Remember, if no information has been uploaded, this section will be greyed out.

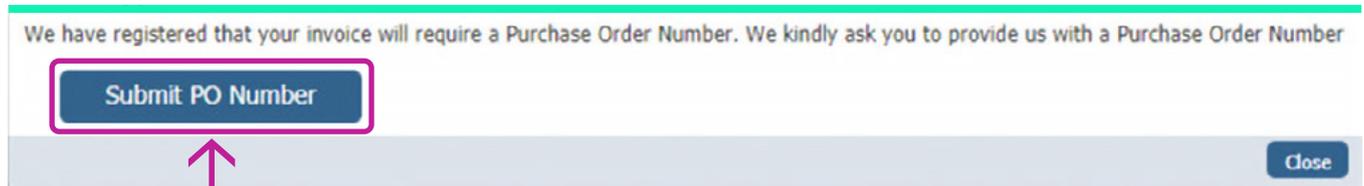
Never forget a date!

Once you have confirmed all of your dates, remember to use the **Add to calendar** function to ensure that you have all of your visit dates quickly and easily organised.

Remember, you can share Outlook meeting invites quickly and efficiently to make sure that you have the right internal audit team and key stakeholders in the right place at the right time.

Assigning a purchase order (PO) to an audit – all you need to know

Often, our clients need to inform LRQA of the PO Number for their visit. If you have advised us that this is required, you will be asked to submit one as soon as you confirm your visit.



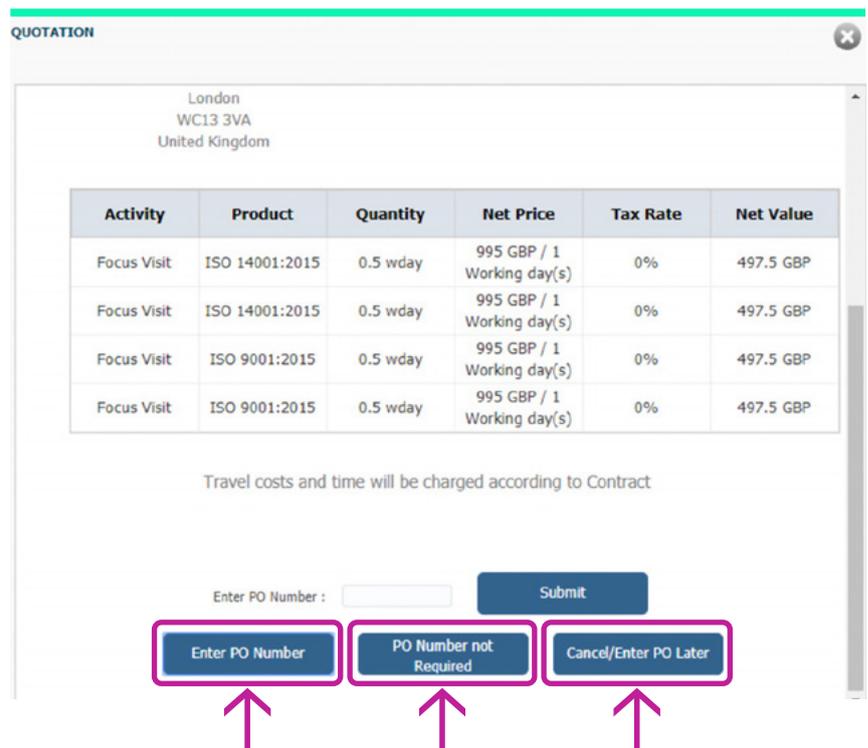
When you click on **Submit PO Number** you will be given three options to either

Enter PO Number, which will open a field for your PO to be entered and submitted

PO Number not Required, which will allow you to inform us that you do not need a PO for this visit

Cancel/Enter PO Later, which will close the screen. A reminder will be sent every 14 days to you until the audit date asking for the PO to be entered. Once ready this can be entered in the Show Details section of the Visits tab.

Remember, if we have on record that you do not require a PO Number, then you will not be asked to submit one but can still do so at any time.



Logon to the portal either through your own bookmarked link or via www.lrqa.com

Don't worry if you ever forget your password; simply click the 'forgot password' button and we will send you an email.

Get in touch

Visit www.lrqa.com for more information



LRQA