**How to conduct a regional audit:**

**Hints and tips from the ACB Scotland Clinical Audit Group**

1. There is useful general information on clinical audits and the audit cycle on the ACB website. This also contains examples of completed regional and national (UK-wide) audits.

<http://www.acb.org.uk/whatwedo/science/audit.aspx>

1. Once a subject for a regional audit has been identified, please contact the ACB Scotland Clinical Audit Group (SAG) for approval and advice as to how to proceed to the next stage. You can either contact your local clinical audit representative (see list on ACB website) or email the chair of SAG.

**Creating the audit questionnaire**

1. The audit questionnaire should be designed to allow responders to complete in a timely manner. Aim to use tick boxes or give options that can be easily selected where possible. Review some previously published audits for ideas. If particular information is required (e.g. workload data or specific assay information) then highlight this at the start of the questionnaire.
2. Once the audit questionnaire is designed it is useful to seek feedback and suggestions from your local audit representative before submitting to SAG.
3. Once completed, the questionnaire should be sent to SAG for approval. The group meets quarterly.
4. If suitable, the audit questionnaire should be completed in the trial version on Survey Monkey® and checked thoroughly before the final link is circulated. If the survey format is unsuitable for Survey Monkey®, a Microsoft Word or PDF version of the audit is acceptable.
5. A Microsoft Word or PDF version of the audit (which allows electronic completion) should also be prepared and circulated with the Survey Monkey® link as some may not have access to Survey Monkey®. This also allows the option for the questionnaire to be printed and completed by hand and posted to the audit lead.

**Distributing the questionnaire**

1. All regional audits should be circulated via the audit lead.
2. A short email letter should accompany the audit questionnaire. This should include a brief description of the audit, as to who should be completing the audit (e.g. one response required from each laboratory or site, whether it needs input from other colleagues in other disciplines *e.g.* Haematology/Immunology etc.). It should also highlight any data required in advance to enable completion (e.g. laboratory statistics, clinical data, method information).
3. Advice should be sought from the SAG regarding the distribution list. In general, audit questionnaires should be sent to Heads of Departments as well as local audit representatives. The SAG holds an up-to-date list including email addresses. Normally a closing date of 3 weeks from the date sent is reasonable but this may vary depending on the type and extent of data required. Further emails may need to be sent as reminders. Local representatives should be able to assist in targeting areas to improve response rates.

**Presenting and disseminating the audit findings**

1. There is usually an opportunity to present and disseminate the findings from the audit at one of the ACB Scotland Scientific meetings. The presentation should be confined to 20 minutes with an overview of the aims of the audit, the standards/guidelines audited against, the findings, and any recommendations for service improvement.
2. There is also an opportunity to present and disseminate the findings from the audit at the annual ACB National (UK) Audit Meeting. This meeting is organised either as a stand-alone meeting or part of a parallel session at the ACB Focus National Meeting. Audit abstracts are scored by the NCBAG committee and selected for poster or oral presentation.
3. All replies should be treated anonymously. In presenting or publishing the data, the number in each group should be sufficient to ensure that individual laboratories cannot be identified.
4. A summary report of the audit should be completed using the NCBAG audit template (available to download from the ACB audit page link as above) and submitted to the SAG chair for addition to the Scotland Audit Group page on the ACB website.

<http://www.acb.org.uk/whatwedo/science/audit/audits-by-group/scotland-audit-group>

1. Anyone undertaking a regional audit is encouraged to publish their work where possible.

**Approval of recommendations**

1. Recommendations must be approved by the ACB Scotland Committee.