

RMS Client Flow Summary

For more detailed instruction please see the RMS Client User Guides. If you do not have the User Guide, you can access it in the Help Section in RMS or contact RMS Support at rmssupport@p-r-i.org or 724-772-8679.

- Login – A company representative must start an application to create a login in RMS
Dashboard/Notification – Each RMS user has their own dashboard of tasks and are notified of assigned tasks via email. Tasks on the dashboard are color coded per due date:
 - Green (upcoming)
 - Yellow (2 days out)
 - Red (past due)
- Profile – Company details, contacts, standards, certs, validity dates, etc.
- Scheduling – Notification of proposed dates sent to client and auditor and task assigned to client and auditor-reject/accept dates.
- Audit planning documents – Client is notified and assigned task to update planning documents (AS–RF114; ISO –RF129) in RMS 90 days ahead of audit. Once updated and submitted by client, auditor is notified, and assigned a task to prepare audit plan.
- Audit plan – Auditor will prepare an audit plan and upload/submit the plan 30 days prior to audit start. Client is notified when uploaded.
- Audit is conducted. All required audit information is entered RMS by auditor and available for client's review after the audit.
- Reports, PEARs, and NCR forms are auto populated once all document fields are completed and auditor submits.
- NCR closure (ISO Audits Only) – Client is notified and assigned task to complete all sections of the NCR form(s) as needed. As the client completes each section of NCR form, the auditor is notified and assigned task to review each. Once all sections accepted, auditor submits final NCR closure and client is notified.
- Report Review – Account Specialist is notified when all audit documents are completed and submitted by the auditor. The documents are reviewed and forwarded to expert review/registration decision as needed.
- Certificate – Upon completion of Initial Certification Audit or Recertification Audit, the certificate will be uploaded in RMS and the client is notified via email from the Account Specialist.
- Expenses/Receipts are entered by auditor into RMS expense template. Invoice is then sent to client.

- Next audit event – target dates are identified in RMS and confirmed by auditor during the audit and included in report. We start the next audit scheduling process 90 days after last audit.
- Recertification – PRI Registrar will begin the recertification process 90 days after the last audit event of your certification cycle. You will receive notification and assigned a task to update your information and we will provide a proposal for the next 3-year certification cycle. Once accepted we will begin scheduling the next audit.