Date : October 23, 2018
To : Accreditation Bodies
     Certification Bodies
Subject : Tips for CB Data Entry in OASIS

This document includes tips to help CB’s avoid the most common OASIS data entry mistakes that have increased impacts.

Select the Correct Certificate During Audit Setup

While setting up a new Recertification, Surveillance or Special audit, the CB is presented with the screen to find a certificate to “Bring Data Forward”. In this part of the audit setup, it is important to select the correct certificate, since that selection is used in the publishing process. Use these guidelines to help with the selection:

1. **Recertification**
   a. Select the certificate you are replacing.

2. **Special**
   a. Select the certificate this audit is intended to support.
   b. If the audit is for a transfer, select the certificate you want to transfer from the other CB

3. **Surveillance**
   a. Select the certificate this audit is intended to support.

Note : The above steps don’t apply to Initial Audits or Partial Audits (except the “First Part” of the Partial Audit).

- If you select the wrong certificate, it may prevent you from publishing the audit.
- If you don’t see the correct certificate, stop and contact IAQG Support
Reminder
1. If you are doing a certificate transfer, publish the Special transfer audit and new certificate before setting up the next audit. The next audit will need to use the newly transferred certificate during setup.
2. Publish each audit and associated certificate (if applicable) before setting up the next audit for that same supplier(s) and series (9100, 9110, 9120).

Select the Correct Audit Type During Audit Setup

During the audit setup process, it is important to select the correct audit type, since this cannot be changed after the audit setup is complete.

⚠ Once the audit is set up, the audit type cannot be changed, so please confirm the audit type before entering any data.

Do You Need to Publish a New Certificate?

Before you publish the audit, ensure you do not need to publish a new certificate. OASIS will usually warn you if certificate data has changed, so please don’t disregard this message.
Do You Know What to Do?

If you are not sure the action you are about to take in OASIS is correct, please review the Online help (https://oasishelp.iaqg.org/).

Note: Using the “Help by Role” or “Help by Application” functions will narrow your help search.

If you are still not sure, after reviewing the online help, contact IAQG Support (iaqgsupport@sae.org) before proceeding.

Examples: Did you know....

1. Data should rarely be deleted, especially audit and certificate data that has been published. Data that is inaccurate should be updated/corrected, but rarely deleted. If you are unsure, please check with IAQGSupport@sae.org before you take action.

   Example:
   a. Don’t delete expired, suspended, or withdrawn certificates. These are valid certificates that are part of the Supplier history. The status can change but they should not be deleted if they are part of the Supplier’s history.

Publish the Audits & Certificates Accurately and on Time

Accurately publishing the report in OASIS is part of the reporting requirements of the scheme.

1. Are you publishing the audits and associated certificates on time?
2. Have you confirmed that none of the non-applicable clauses are applied in the Process Matrix, PEARs, or NCR’s?

Do You Have Questions?

1. Online Help
   a. Website: https://oasishelp.iaqg.org/
   b. Context (while using OASIS)
2. Contact IAQG Support
   a. Email: iaqgsupport@sae.org
   b. Form: https://www.iaqg.org/oasis/contactus