TABLE OF CONTENTS

• Dashboard Overview – Slides 3-5
• Company Profile – Slide 6-7
• Master Audit Program Page – Slide 8-9
• Site Audit Program Page – Slide 10-11
• Access Quote/Addendum – Slide 13
• Password Help – Slide 14-16
• RMS Support – Slide 17-18
DASHBOARD OVERVIEW
DASHBOARD OVERVIEW

Dashboard
Click Dashboard during anytime in RMS to bring you back to your main dashboard.

Audit Program
Click Audit Program to access your audit details:
• Master Audit Program (MAP) – Takes you to the main audit page. Click on the 5 digit number to access the MAP
• Audit List – Brings up a list of all future and past audits. Click on any of the 5 digit numbers to access the audit

Help
The Help Tab holds guidelines and documents to assist clients through the audit. There is also a list of all RMS help guides and Registrar contacts.

Request for Quote
Click Request for Quote if you would like to apply for additional certifications

Log Out
Log out of RMS by clicking on the down arrow and click log out.
DASHBOARD OVERVIEW

Profile
Review Profile details by clicking on the blue arrows or the company name. Your main PRI Registrar contacts are also listed under Profile. To access their email addresses, click on their names.

My Tasks
Any opened tasks that require action on your part will be listed under My Tasks. Once completed, they will be removed from the list and moved to Recent Closed Task List.

Task Colors
Red – Past Due
Yellow – Due in 3 days or less
Green – Due in 5+ days

Certifications
Review Certification details by clicking on the blue arrows or the standard name.

Quote Requests
Any new quote requests from you will be listed here.

Copyright© Performance Review Institute
COMPANY PROFILE

**Locations**
All locations will be listed under the Locations Tab. If you have multiple users, you can also view their access on this tab.

**Certification**
Each certification cycle will be listed under the Certification Tab. Click on the 5 digit number to access the Master Audit Program Page.

**Profile**
Review Profile details. If any details need change, please contact your Account Specialist.
SITE AUDIT PROGRAM
### Audits
The SAP shows a list of the 3-year contract cycle. Each audit can be accessed by clicking on the name of the audit.

<table>
<thead>
<tr>
<th>Stage 1</th>
<th>Stage 2</th>
<th>Surveillance</th>
<th>Surveillance</th>
</tr>
</thead>
</table>

### Dates
Target dates are established based on the desired timeframe and cert expiration date.

### Contacts
Additional contacts like Secondary Contact or OASIS Admin can be viewed on the Location tab under the Profile and on the SAP page.

- **Primary Quality Contact**
  - **Jane Client**
  - Quality Manager
  - Ph: 123-456-7890

- **Secondary Quality Contact**
  - **Joe Client**
  - Quality Coordinator
  - Ph: 123-456-7890

### SAP Details
Any company details that are found on this page can be updated by contacting your Sales Engineer or Account Specialist.
ACCESS QUOTE / ADDENDUM
Once a quote or addendum is accepted in RMS, you can click on View Pricing on the MAP page to access it. This will bring you to the most recent quote applicable to the contract cycle.
PASSWORD HELP
LOGIN AND PASSWORD RESET

RMS Login Page
Click on the link to go to the RMS Login Page
https://rms.priregistrar.org

Forgot Password
Click on the Forgot Password link.
*If you have previously completed an application as a Guest, click here to set up a password.
Retrieve Password
Enter your email address, your last name, and click on the Retrieve Password button.

A link will be sent to your email to reset your RMS password.
RMS SUPPORT

- For technical support or questions about RMS
  - Contact the support helpdesk
  - Hours: 8:00 AM – 5:00 PM ET M-F
  - Calls / emails returned within 4 business hours

rmssupport@p-r-i.org
724-772-8679