

Run an audit session

Create an audit session, add and prepare evidence with Prepare audit, and share files with an auditor from the Audit Centre.

WHO IT IS FOR Owner, Admin, Manager, Compliance Officer	TIME NEEDED About 15 minutes	LAST REVIEWED 3 October 2026
---	--	--

Who this is for

Permissions: To create a session you need **Can create audit session**. To upload, share, stop sharing or remove files, and to use **Prepare audit**, you need **Can prepare audit evidence**. **Run scoped assessment** and **Delete session** also need **Can edit audit session**. Switching on **Audit Centre automation** is for an Owner or Admin. Owners and Admins have all of these permissions.

Before you begin

- Read the Audit Centre overview for what an audit session is.
- **Audit Centre automation** is on in **Account settings > Automation & Capacity Controls**. It is on unless an Owner or Admin has switched it off. While it is off, **Generate selected** and **Download evidence pack (ZIP)** do not work. See Automation Capacity.
- You know when the audit will run and when the auditor's access should open and close.



Steps

1 Go to **Audit Centre > Audit sessions > Create session**

- 1 In the left menu, under **Administration**, choose **Audit Centre**, then choose the **Audit sessions** tab.
- 2 Choose **Create session** at the top right of the list. The **Create audit session** window opens. The next two steps fill it in.
- 3 Each existing session is a card with its name, its type, a status label such as **Draft**, and **Expires**, the time its auditor access ends. Choose a card to open that session.

The screenshot shows the BondiByte Audit & Compliance Centre interface. On the left, a dark sidebar contains a 'WORKSPACE NAVIGATION' menu with sections for PLATFORM, OPERATIONS, and REGISTERS. The 'Audit sessions' tab is highlighted in the top navigation bar. The main content area, titled 'Audit sessions', shows a list of three audit sessions. Each session is represented by a card containing its name, type, expiration date, and status (Draft). A 'Create session' button is located in the top right corner of the session list.

Choose the **Audit sessions** tab (1), then **Create session** (2). Each session is a card (3).



2 Describe the session

- 1 In **Audit name**, type a name you will recognise. This is required.
- 2 In **Audit type**, choose the closest type.
- 3 In **Auditor organisation**, type the audit firm, if you know it.
- 4 In **Audit start date** and **Audit end date**, choose the days the audit is expected to run.

Audit name: Required. Shown on the session card and at the top of the session. A name with the year in it is easier to find later.

Audit type: Starts as **Verification audit**. Shown on the session card.

Auditor organisation: Optional. The name of the audit firm, for your own records.

Audit start date, Audit end date: Optional. The days the audit is expected to run. They appear in the invitation email the auditor receives.

The screenshot shows a 'Create audit session' modal form. It has a title bar with 'Create audit session' and a 'Close' button. The form contains four main sections, each with a numbered callout (1-4) in a blue circle:

- 1** **Audit name:** A text input field containing 'Morgan Sample Verification Audit'.
- 2** **Audit type:** A dropdown menu with 'Verification audit' selected and a downward arrow.
- 3** **Auditor organisation:** A text input field containing 'Example Audit Services'.
- 4** **Audit start date** and **Audit end date:** Two date picker fields. The start date is '10/11/2026' and the end date is '11/11/2026'. Each field has a calendar icon to its right.

Below the date fields, the text 'Access starts' is partially visible.

Type the audit name (1), check the audit type (2), add the auditor organisation (3) and choose the audit dates (4).



3 Set the auditor's access, then create the session

- 1 In **Access starts**, choose the date and time the auditor's access opens. This is required.
- 2 In **Access expires**, choose when access ends. This is required, and it must be later than **Access starts**.
- 3 In **Scope notes**, describe what the audit covers.
- 4 Tick **Allow downloads by default** if auditors may open and download the registers you generate. It is not ticked to start. You can change it for each file later.
- 5 Leave **Allow auditor requests** ticked if auditors may ask you for more files.
- 6 Choose **Create session**. Choose **Cancel**, or **Close** at the top of the window, to leave without saving.

A message confirms **Audit session created**. Upload the files you want the auditor to see. The new session opens on its **Evidence** tab with the status **Draft**. BondiByte opens and closes the auditor's access at the times you set.

Note: The note under **Access starts** says **Login details are emailed to the auditor when it opens**. If you add the auditor before that time, check their card when access opens. See Give an auditor access.

The screenshot shows a 'Create session' form with the following elements:

- 1 Access starts:** A date and time picker set to '30/10/2026 09:00 AM'. Below the picker, it says 'Auditor portal access opens at this time. Login details are emailed to the auditor when it opens.'
- 2 Access expires:** A date and time picker set to '13/11/2026 05:00 PM'. Below the picker, it says 'Auditor access is automatically revoked at this time.'
- 3 Scope notes:** A text area containing 'Sample audit used for documentation. Covers worker compliance and participant records.'
- 4 Allow downloads by default:** An unchecked checkbox.
- 5 Allow auditor requests:** A checked checkbox.
- 6** At the bottom left of the form, next to the 'Create session' button.

At the bottom right of the form are two buttons: 'Cancel' and 'Create session'.

Choose when access starts (1) and expires (2), add scope notes (3), set the two tick boxes (4 and 5), then choose Create session (6).



4 Upload your own files

You can upload your own files, generate registers from your records in the next steps, or do both.

- 1 On the **Evidence** tab, **Uploaded files** lists every file in the session. A new session says **No files uploaded**.
- 2 In **Upload file evidence**, type an **Evidence title**, or leave it blank to use the file name.
- 3 In **Description**, say what the file is.
- 4 Under **File**, choose **Choose File** and pick the file from your computer.
- 5 Leave the two tick boxes as they are unless you need to change them. Neither one shares the file.
- 6 Choose **Upload to audit**. A message says **File uploaded to the audit evidence list**, and the file appears in **Uploaded files**.

Show this file to the auditor: Ticked to start.
A new file always starts as **Draft (private)** until you choose **Share with auditor**.

Allow auditor download: Ticked to start.
Whether an auditor can open and download the file once it is shared.

The screenshot shows a two-panel interface. The left panel, titled 'Uploaded files', contains a dashed box with a folder icon and the text 'No files uploaded' and 'Uploaded audit files will appear here.' The right panel, titled 'Upload file evidence', contains a description box with the text 'Download whatever records you need from the platform, then upload the final files here for the auditor.' Below this are several input fields: 'Evidence title', 'Description' (containing 'Example file used to show how an upload looks.'), and 'File' (containing a 'Choose File' button and 'No file chosen' text). At the bottom of the right panel are two checked checkboxes: 'Show this file to the auditor' and 'Allow auditor download', followed by an 'Upload to audit' button.

The **Uploaded files** panel (1), the **evidence title** (2), the **description** (3), the **file** (4), the two **tick boxes** (5) and **Upload to audit** (6).



5 Go to Prepare audit and choose the session

- 1 Choose the **Prepare audit** tab. Five numbered buttons run across the top: **1. Engagement**, **2. Scope**, **3. Readiness**, **4. Evidence** and **5. Share**. Choose any of them to move between steps.
- 2 In **Audit session**, choose the session you created. It starts on the first session in the list, so check it is the right one.
- 3 In **Evidence period from**, choose the first day the **Incident register** and the **Service delivery reconciliation** should cover.
- 4 In **Evidence period to**, choose the last day.
- 5 Tick **Require auditors to verify with an emailed code** if each auditor must enter a code sent to their email address. It is not ticked for a new session.
- 6 Choose **Save and continue**. If your role cannot edit sessions, the button reads **Next** and nothing is saved.

On **2. Scope**, leave every list (**Sites**, **Participants** and **Workers**) unticked to cover the whole organisation, then choose **Save and continue**. **3. Readiness** is optional: **Run scoped assessment** saves a readiness result with the session. Choose **Save and continue** again to reach **4. Evidence**.

Evidence period from, Evidence period to:

The days covered by the **Incident register** and the **Service delivery reconciliation**. The other registers show your records as they stand when you generate them. Starts as the last six months.

Readiness Audit sessions Issues Checks **Prepare audit** Complaints Ratings Settings

1. Engagement 2. Scope 3. Readiness 4. Evidence 5. Share

Engagement

Pick the audit session to prepare, the period the evidence should cover, and whether auditors must verify with an email code.

Audit session (2) Evidence period from (3) Evidence period to (4) Require auditors to verify with an emailed code (5)

Morgan Sample Verification Audit (Ve... 01/05/2026 30/09/2026

Back Save and continue (6)

The five steps (1), the audit session (2), the evidence period from (3) and to (4), the emailed code tick box (5) and Save and continue (6).



6 Generate evidence

- 1 On the **4. Evidence** step, under **Generate evidence**, tick the registers you want: **Worker compliance register (CSV)**, **Participant records register (CSV)**, **Incident register (CSV)**, **Policy and document register (CSV)**, **Service delivery reconciliation (CSV)** and **Audit readiness report (PDF)**. All six are ticked to start. The screenshot shows three unticked.
- 2 Choose **Generate selected**. The button reads **Generating...** while it works, and a message says **Generated** followed by the number of items.
- 3 The line under the button counts the generated items and says **Regenerating replaces unshared drafts**.

Important: Each register is made from your current records and saved as a draft. Nothing is visible to the auditor until you share it.

The registers to generate (1), with three unticked here, then Generate selected (2) and the note that counts the generated items (3).



7 Share files with the auditor

- 1 On the **5. Share** step, each generated or uploaded item is listed with its status: **Draft (private)**, **Shared with auditor** or **Sharing revoked**.
- 2 Choose **Share with auditor** on an item to release it. A message says **Shared with the auditor**.
- 3 To take an item back, choose **Stop sharing**. A message says **No longer visible to the auditor**.
- 4 Choose **Download evidence pack (ZIP)** to download every shared file with a list of the files. It does not include files you have not shared.

The **Evidence** tab of the session has the same buttons on each file's card, and three more. Tick **Auditor can download** to let the auditor open and download that file, choose **Download** to save the file yourself, and choose **Remove** to take it out of the session.

Important: An auditor can open a shared file only while downloads are allowed for it. A register you generate follows **Allow downloads by default**, which is not ticked to start. If the auditor needs to open it, tick **Auditor can download** on the file's card on the **Evidence** tab.

Warning: Remove does not ask you to confirm. If you remove a shared file, the auditor can no longer see it. Use **Stop sharing** instead if you only want to hide a file for now.

The screenshot shows the 'Prepare audit' tab with a sub-tab 'Share with the auditor'. At the top, there's a progress bar with five steps: 1. Engagement, 2. Scope, 3. Readiness, 4. Evidence, and 5. Share (highlighted in blue). Below this, a message states: 'Shared items appear in the auditor portal immediately; everything else stays private. Invite auditors from the Audit sessions tab when you are ready.' There are three file cards: 1. 'Audit readiness report' with status 'Shared with auditor · sha256 3a02877a5ca7...' and a 'Stop sharing' button (labeled 3). 2. 'Participant records register' with status 'Draft (private) · sha256 0ad5fb4c3317...' and a 'Share with auditor' button (labeled 2). 3. 'Worker compliance register' with status 'Draft (private) · sha256 72faaa1d668a...' and a 'Share with auditor' button. At the bottom, there's a 'Download evidence pack (ZIP)' button (labeled 4) with a tooltip: 'The pack contains every shared file plus a manifest with SHA-256 hashes.'

Each item shows its status (1). Choose **Share with auditor** (2) to release an item and **Stop sharing** (3) to take it back. **Download evidence pack (ZIP)** downloads the shared files (4).



What happens next

Files stay **Draft (private)** until you share them. An auditor sees only the files you have shared, and only between **Access starts** and **Access expires**.

To add the auditor, see Give an auditor access. To link your files to the standards before you share, see Practice Standards mapping.

While the audit runs, answer the auditor's requests (Manage evidence requests) and check what they looked at (Review auditor access history).

Important notes

Important: The Audit Centre helps you prepare and organise evidence and share it with an auditor. It does not decide the outcome of an audit, and it does not replace advice from your auditor or the NDIS Quality and Safeguards Commission.

Good practice

- Name each session so you can find it later, for example the audit type, the year and the audit firm, and fill in **Scope notes**. Set **Access expires** a little after the planned end of the audit, so there is room for follow-up requests.
- Fix critical issues on **Readiness** before you generate registers, then generate them close to the audit so they show your current records. See Check audit readiness.
- Check each file before you share it, and share only what the auditor needs. Before you tell the auditor their access is ready, use **Preview portal** to check they can open each file. See Give an auditor access.

Troubleshooting

I cannot see **Create session**, or I cannot see **Prepare audit**.

Why it happens: **Create session** needs **Can create audit session**. **Prepare audit** needs **Can prepare audit evidence** as well as **Can view audit centre**.

What to do: Ask an Owner or Admin to check your role in **Configuration > Roles & Permissions**.

Account settings has no **Automation & Capacity Controls** card.

Why it happens: Your role is not Owner or Admin, or your multi-factor authentication set-up is not finished.

What to do: Ask an Owner or Admin to switch on **Audit Centre automation**, or finish the multi-factor authentication set-up and reload the page.



A message says **Audit Centre automation is turned off for your organisation**. when I generate evidence or download the evidence pack.

Why it happens: Audit Centre automation is switched off.

What to do: An Owner or Admin switches it on. Open the account menu at the top right, choose **Account settings**, scroll to **Automation & Capacity Controls**, find **Audit Centre automation** in **Automation controls**, choose **Enable**, then choose **Resume** in the window **Resume automatic handling?** A message confirms **Audit Centre automation enabled**. Existing sessions and files stay visible. **Download evidence pack (ZIP)** shows the same wording in the new browser tab instead of a file.

A message begins **Paused – Automation Capacity exhausted**.

Why it happens: Your organisation has used its automation capacity for now.

What to do: Generation and the evidence pack resume when capacity is available again. Existing files stay visible.

The message **Access expiry must be after access start**. appears.

Why it happens: **Access expires** is the same as, or earlier than, **Access starts**.

What to do: Choose a later **Access expires**, then choose **Create session** again.

Prepare audit says **No open audit sessions**, or a message says **Choose an audit session first (create one under Audit sessions)**.

Why it happens: You have not created a session yet, or none is chosen in **Audit session**.

What to do: Create a session on the **Audit sessions** tab, then choose it in **Audit session** on the **Engagement** step.

My new file is not visible to the auditor.

Why it happens: Generating or uploading a file does not release it. The card still says **Draft (private)**.

What to do: Choose **Share with auditor** on the file's card, on the **Evidence** tab or in the **Share** step of **Prepare audit**.

Need more help?

Guides: bondibbyterobotics.com.au/guides | Support: support@bondibbyterobotics.com.au

*Screens show a demonstration organisation with made-up names and may differ slightly as BondiByte is updated.
Last reviewed 3 October 2026.*