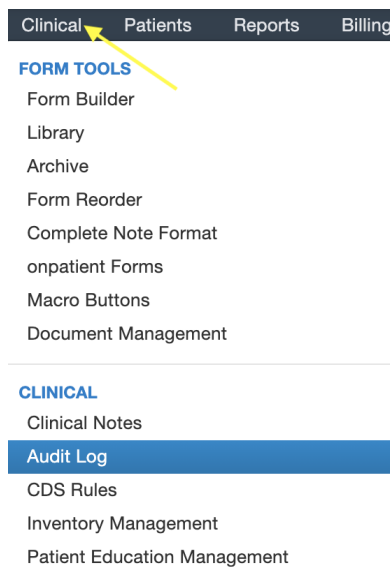


Using the Clinical Audit Log

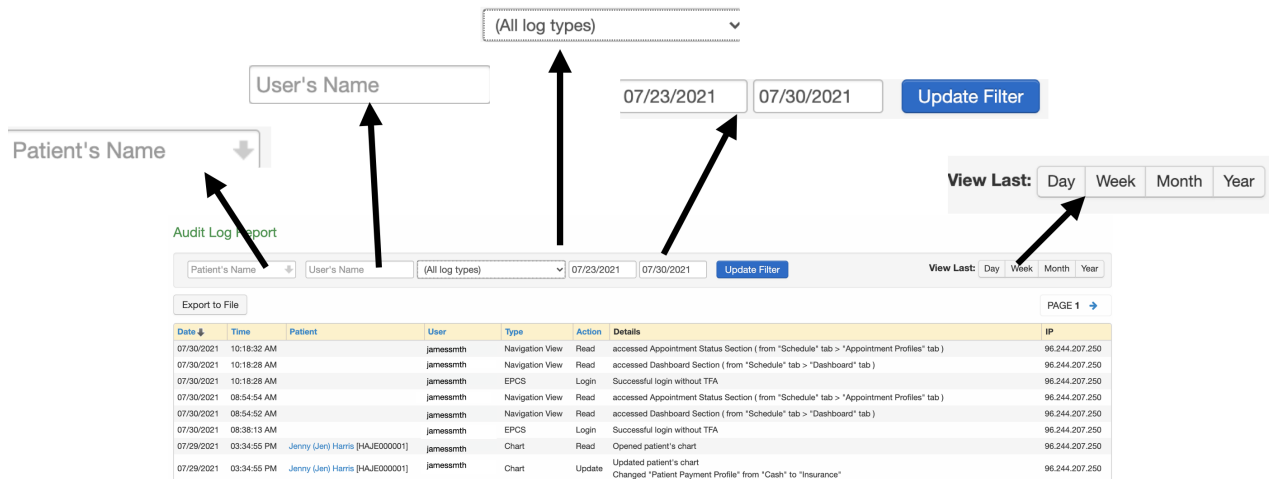
07/24/2024 10:11 pm EDT

The Audit Log is a tool that helps you track account activity. It can be used to track your patients' changes, view staff activity, troubleshoot problems, and more.

To get to the Audit Log, mouse over **Clinical** and then select **Audit Log**.



After selecting **Audit Log**, you'll be presented with the **Audit Log Report** page. Here you'll be able to view all of the logs regarding your patients, users, and log types. You can filter by date range or you can quickly see results from the last: day, week, month, or year with the **View Last** shortcuts.



You can filter by **Log Type** to see different actions in your account.

- ✓ (All log types)
- Account
- Allergy
- API
- Appointment
- Appointment Profile
- Appointment Template
- Billing Profile
- Break The Glass
- Chart
- Clinical Note
- EPCS
- eRx
- Family History
- Fax
- Fee Schedule
- File Access
- Immunization
- Insurance
- Insurance Authorization
- Lab Order
- Login
- Medical Form
- Medication
- MedList
- Navigation View
- Office
- OnPatient
- Permissions
- Phone Log
- Problem
- Refill Request
- Sample Data
- Telehealth
- Uploaded Documents
- Vital Flowsheet

In the example below, the report is filtered by appointment within the date range.

Audit Log Report

Date ↓	Time	Patient	User	Type	Action	Details
07/29/2021	09:21:49 AM	Jenny (Jen) Harris [HAJE000001]	jamesmith	Appointment	Create	Created Appointment [182165318] 07/29/21 09:20 Jenny (Jen) Harris: from iPad
07/29/2021	09:21:49 AM	Jenny (Jen) Harris [HAJE000001]	jamesmith	Appointment	Update	Updated Appointment [182165318] 07/29/21 09:20 Jenny (Jen) Harris: Changed "Scheduled Time" from "None" to "2021-07-29 09:20:00" Changed "Patient" from " [None]" to "Jenny (Jen) Harris [95143939]" Changed "Office" from " [None]" to "Eastern Time Office [215348]" Changed "Duration" from "15" to "30" Changed "Doctor" from " [None]" to " James Smith [205858]" Changed "Payment Profile" from "" to "Cash" Changed "Patient Payment Posted Date" from "None" to "2021-07-29"
07/29/2021	09:10:36 AM	Michelle Harris [HAMI000005]	jamesmith	Appointment	Read	Opened the appointment
07/29/2021	09:09:40 AM	Michelle Harris [HAMI000005]	jamesmith	Appointment	Read	Opened the appointment
07/29/2021	09:09:06 AM	Michelle Harris [HAMI000005]	jamesmith	Appointment	Read	Opened the appointment
07/29/2021	09:08:46 AM	Michelle Harris [HAMI000005]	jamesmith	Appointment	Read	Opened the appointment
07/29/2021	09:08:13 AM	Dana Harris [HADA000001]	jamesmith	Appointment	Read	Opened the appointment
07/29/2021	09:05:43 AM	Michelle Harris [HAMI000005]	jamesmith	Appointment	Read	Opened the appointment
07/28/2021	01:59:24 PM	Henry Harris [HAHE000001]	jamesmith	Appointment	Create	Created Appointment [182091677] 07/28/21 15:00 Henry Harris: from iPad

The audit log allows you to troubleshoot issues within your operations and also to view what changes are happening within a patient's account. For example, if there's a problem with a patient's insurance authorization you can look into the audit log and look for **Insurance Authorization** as the log type.

View Last:

PAGE 1

Date ↓	Time	Patient	User	Type	Action	Details	IP
07/30/2021	11:19:45 AM	Jenny (Jen) Harris [HAJE000001]	jamesmith	Insurance Authorization	Create	Created patient's authorization Changed "End Date" from "None" to "2021-12-31" Changed "Specialty" from "" to "Chiropractor" Changed "Auth Number" from "" to "123456789" Changed "Start Date" from "2021-07-30" to "2021-07-26" Changed "Number Of Visits" from "None" to "20"	96.244.207.250

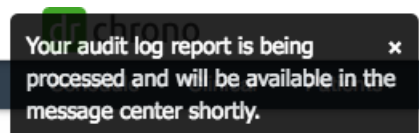
You can also see when notes are locked and unlocked with the **Clinical Note** log type.

View Last:

Date ↓	Time	Patient	User	Type	Action	Details
07/30/2021	11:28:14 AM	Jenny (Jen) Harris [HAJE000001]	jamesmith	Clinical Note	Update	Update Clinical Note: Clinical note set html template note html template changed from [clinical/2021/07/note_205858_182165318_28f4662f-040a-45aa-b0dc-979aae7c72cd.html] to [clinical/2021/07/note_205858_182165318_c5c2d02f-900a-47c3-9942-6cfe671925d3.html]
07/30/2021	11:28:11 AM	Jenny (Jen) Harris [HAJE000001]	jamesmith	Clinical Note	Unlock	Unlocked note for Appointment [182165318] 07/29/21 09:20 Jenny (Jen) Harris:
07/29/2021	11:17:57 AM	Jenny (Jen) Harris [HAJE000001]	jamesmith	Clinical Note	Update	Update Clinical Note: Clinical note render on lock appointment: [182165318] template path: [clinical/2021/07/note_205858_182165318_28f4662f-040a-45aa-b0dc-979aae7c72cd.html]
07/29/2021	11:17:56 AM	Jenny (Jen) Harris [HAJE000001]	jamesmith	Clinical Note	Lock	Locked note for Appointment [182165318] 07/29/21 09:20 Jenny (Jen) Harris:

It's also possible to export your logs to a CSV file that can be viewed in most spreadsheet software programs such as Microsoft Excel. To export your logs, select **Export to File** toward the top of the page, near your filters.

As a confirmation, you'll receive the following notification:



To view your exported audit log, go to your message center from the navigation bar.

