


Audit Log

Last modified on 08/27/2025 6:08 pm EDT

Use the **Audit Log** to track changes, view staff activity, and troubleshoot issues.

View audit logs | Log types

View audit logs

 The timestamp reflects the time zone of the logged-in user.

1. Select **Clinical > Audit Log**.
- The **Audit Log Report** page opens.
2. Do one of the following:
- To view logs filtered by patient name, username, log type, or date range, enter or select the criteria and then select **Update Filter**.

To view the last day, week, month, or year of activity, select one of the **View Last** buttons.

Audit Log Report

Patient's Name

Username

(All log types)

10/01/2024

11/01/2024

Update Filter

View Last:

Day

Week

Month

Year

Export to File

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Date	Time	Patient	User	Type	Action	Details	IP
10/31/2024	01:58:28 PM PDT	1212 (Amanda)	[X0001] 719	Chart	Read	Opened patient's chart	02
10/31/2024	01:58:18 PM PDT	1212 (Amanda)	[X0001] 719	Navigation View	Read	accessed appointments Section (from "Patient Dashboard" tab > "Appointments" tab)	02
10/31/2024	01:58:13 PM PDT	1212 (Amanda)	[X0001] 719	Navigation View	Read	accessed Education Resources Section (from "Patient Dashboard" tab > "Education Resources" tab)	02
10/31/2024	01:58:09 PM PDT	1212 (Amanda)	[X0001] 719	Navigation View	Read	accessed Intake Data Section (from "Patient Dashboard" tab > "Intake Data" tab)	02
10/31/2024	01:58:08 PM PDT	1212 (Amanda)	[X0001] 719	Navigation View	get_all	accessed CQMs Section (from "Patient Dashboard" tab > "CQMs" tab)	02
10/31/2024	01:58:04 PM PDT	1212 (Amanda)	[X0001] 719	Navigation View	Read	accessed Drug Interactions Section (from "Patient Dashboard" tab > "Drug Interactions" tab)	02
10/31/2024	01:57:55 PM PDT	1212 (Amanda)	[X0001] 719	Navigation View	Read	accessed Allergy List Section (from "Patient Dashboard" tab > "Allergy List" tab)	02
10/31/2024	01:57:52 PM PDT	1212 (Amanda)	[X0001] 719	Navigation View	Read	accessed Documents Section (from "Patient Dashboard" tab > "Documents" tab)	02
10/31/2024	01:51:34 PM PDT	1212 (Amanda)	[X0001] 719	Chart	Read	Opened patient's chart	02
10/31/2024	01:51:31 PM PDT	1212 (Amanda)	[X0001] 719	Chart	Read	Opened patient's chart	02
10/31/2024	01:51:29 PM PDT		719	Navigation View	Read	accessed Patient List Section (from "Patients" tab > "Patient" tab)	02
10/31/2024	01:51:27 PM PDT		719	Navigation View	Read	accessed Patient List Section (from "Patients" tab > "Patient" tab)	02
10/31/2024	01:51:25 PM PDT		719	Navigation View	Read	accessed Appointment Status Section (from "Schedule" tab > "Appointment Profiles" tab)	02

Log types

Select a log type to see the different types of account activity. A few examples are shown below.

Filter by appointment and date range

You can view when appointments were created, updated, or deleted, as well as who performed each action and for which patient. To view appointment logs for a specific date range, select the **Appointment** log type and the date range, and then select **Update Filter**.

Audit Log Report

Patient's Name

User's Name

Appointment

07/23/2021

07/30/2021

Update Filter

View Last: Day Week Month Year

Export to File

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Date	Time	Patient	User	Type	Action	Details	IP
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	02
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:	02
						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	02
07/29/2021	09:09:40 AM	Michelle Harris [HAMI000005]	jamesmith	Appointment	Read	Opened the appointment	02

Filter by insurance authorization

You can troubleshoot issues within your operations and view changes in a patient's account. To troubleshoot insurance authorization issues, filter the logs by the Insurance Authorization log type.

Patient's Name

User's Name

Insurance Authorization

07/30/2020

07/30/2021

Update Filter

View Last:

Day

Week

Month

Year

Export to File

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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 "2021-07-28" Changed "Number Of Visits" from "None" to "20"	96.244.207.250

Filter by clinical note

To see when clinical notes were locked or unlocked, filter the logs by theClinical Note log type.

Patient's Name

User's Name

Clinical Note

07/23/2021

07/30/2021

Update Filter

View Last

Export to File

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: