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.

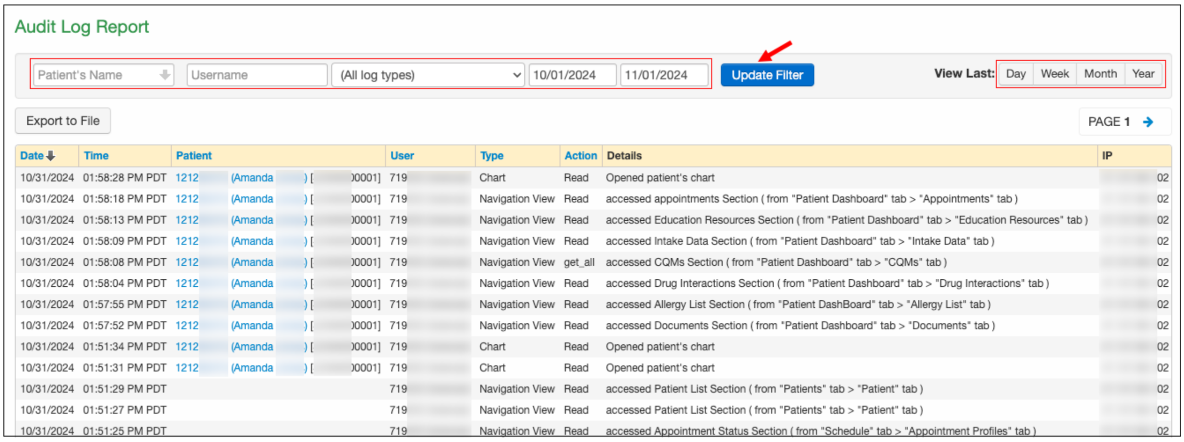
View audit logs | Log types

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.



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

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Date	Time	Patient	User	Type	Action	Details	IP
07/29/2021	09:21:49 AM	Jenny (Jen) Harris [HAJE000001]	jamessmith	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]	jamessmith	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"	02
07/29/2021	09:10:36 AM	Michelle Harris [HAMI000005]	jamessmith	Appointment	Read	Opened the appointment	02
07/29/2021	09:09:40 AM	Michelle Harris [HAMI000005]	jamessmith	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

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Date	Time	Patient	User	Type	Action	Details	IP
07/30/2021	11:19:45 AM	Jenny (Jen) Harris [HAJE000001]	jamessmith	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

Filter by clinical note

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

Patient's Name | User's Name | Clinical Note | 07/23/2021 | 07/30/2021 | Update Filter | View La

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Date	Time	Patient	User	Type	Action	Details
07/30/2021	11:28:14 AM	Jenny (Jen) Harris [HAJE000001]	jamessmith	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]	jamessmith	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]	jamessmith	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-979aae7c72
07/29/2021	11:17:56 AM	Jenny (Jen) Harris [HAJE000001]	jamessmith	Clinical Note	Lock	Locked note for Appointment [182165318] 07/29/21 09:20 Jenny (Jen) Harris: