Run an Audit Report

CareRight features a detailed audit logging system.

System Administration

Two key settings control the level of data recorded.

Note that **detailed auditing of accesses** records <u>all</u> access to all items, for example a broad patient search may display 50 results - this will be recorded as an "access" to those records; even if it was only a brief summary.

An access is only recorded once every 20 minutes per object (as of version 7.1.0 and above).

Detailed Auditing Enabled   true ⌄

Detailed Auditing Of Accesses Enabled   true ⌄

Audit Reports

The audit report allows you to report all access to objects/areas in CareRight. The process to do an audit report is driven by specific object IDs (data being audited). To get accurate results, you must obtain the correct object ID.

**To obtain an Audit report for a MRN/Patient**

1. **Search for a patient.**

2. Click **Show**.

3. You will need the Patient MRN

4. Return to the Dashboard.

5. In the Main Menu, click **Reports**.

6. Click **new** and then select **Audit Report**.

    a. The Audit report will display

7. Enter a date range if needed.

8. Add filter : Patient MRN

9. Enter the previously obtained Patient MRN

10. Select report format: Excel Worksheet

11. Select **Run**.

    a. The Report will generate and you will able to View or Download it.

Important Note: the audit report will display any interaction where, in this case, a patient, has occurred. Even if they have displayed in a general patient search.

Admission

To audit an admission, you need to obtain the correct ID for admission.

1. Search for the Admission you are auditing.
2. Search for **Patient**.
3. Click **Show**.
4. Click **Admission**.
5. Click on the Admission ARN : Your Object ID appears in the URL address bar:

   http://cr.test.clintelsystems.com/patients/13/admissions/**3**

6. In this example, your object ID is 3.
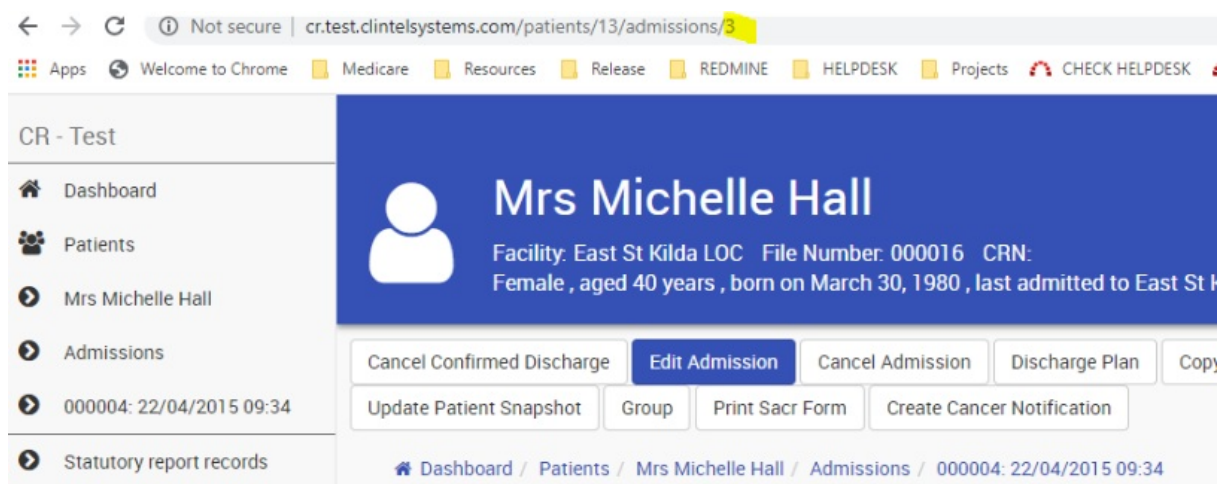
7. Return to the Dashboard.
8. In the Main Menu, click **Reports**.
9. Click **New Report**
10. Click **Audit Report**.
    a. The Audit report will display
11. Enter a date range if needed.
12. Add filter - Access Type: Update
13. Add Filter Object name: Admission
14. Add Filter Object ID: In this example 3

15. Select **Run**.
    a. The Report will generate and you will able to View or Download it.

To obtain an Audit report for a Staff Member

1. Find the Staff Member in Admin > Users and Groups > Staff Members

2. Click **Show**.

3. Note the Staff Members

   a. First Name

   b. Middle Name

   c. Last Name

   d.

4. Return to the Dashboard.

5. In the Main Menu, click **Reports**.

6. Click **Audit Report**.

   a. The Audit report will display

7. Enter a date range if needed.

8. Add filter : Staff Member Name

9. Add Staff Members First Name into first Filter

10. Add filter : Staff Member Name (if Staff Member has Middle Name recorded)

11. Add Staff Members Middle Name into second Filter (if Staff Member has Middle Name recorded)

12. Add filter : Staff Member Name

13. Add Staff Members Last Name into third Filter

14.

15. Ensure Report logic setting is set to Show accesses matching all filters

16. Select report format: Excel Worksheet

17. Select **Run**.

a. The Report will generate and you will able to View or Download it.

Important Note: First Name, Middle Name and last name must be put in as separate filters.

Appointment

1. Find the Appointment in the Appointments Calendar

2. Right Click **Details**.
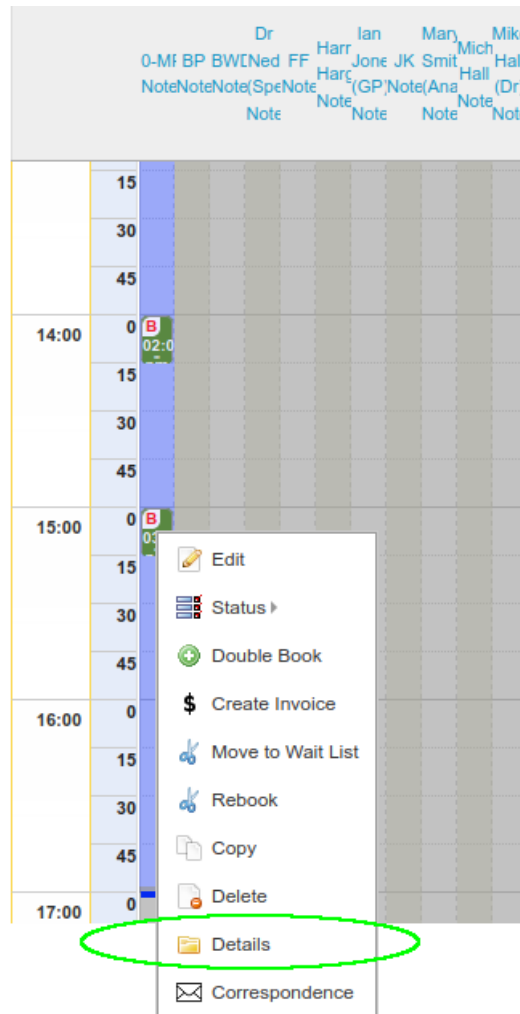
3. Click **More Information** at bottom of panel

Alex Walker has a total of $6545.15 outstanding on all accounts. Current:$100.75 30 days:$0.00 60 days:$0.00 90 days:$2069.60.

Provider	Magus Polan
Location	Clintel Clinic
Room	
Session Name	Magus Monday
Session Type Category	Consultation
Patient	WALKER, Alex
DOB	15/08/1945
Phone	
Address	Mr Alex Walker 16 Tolkin Way Killarney Heights NSW 2087 Andorra
Status	Booked
Appointment Type	C - Consult (Short)
Comments	

More Information

4. Note the **Appointment Id** in the URL of the appointment.

cr.test.clintelsystems.com/providers/10/appointments/806/details

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CR - Test

- Dashboard
- Appointments
- Cases
- Correspondence
- Events
- Exports
- Followups
- Imports
- Invoices & Claims
- Locations
- Patients

Dr Magus Polan

View Patient   Edit Appointment   New Correspondence

- Alex Walker has a total of $6545.15 outstanding on all accounts. Current:$100.75 30 days:$0.00 60 days:$0.00 90 days:$2

Appointment

Date	11/05/2020
Start Time	03:00 PM
Duration	15
Patient	Mr Alex Walker

5. Return to the Dashboard.

6. In the Main Menu, click **Reports**.

7. Click **Audit Report**.

   - The Audit report will display

8. Add filter : Object Name

9. Add filter : Object Id

10. Add **Appointment** into Object Name filter

11. Add the **Appointment ID** noted in **step 4** into the Object Id filter

12. Select **Run**.

   - The Report will generate and you will able to View or Download it.

Audit Report Columns

Description - Where a change was made to a record in the system,a " Diff" of changes is shown.