# How to Run & Read the Audit Report in HMIS

Released April 2021

NC COALITION to end HOMELESSNESS

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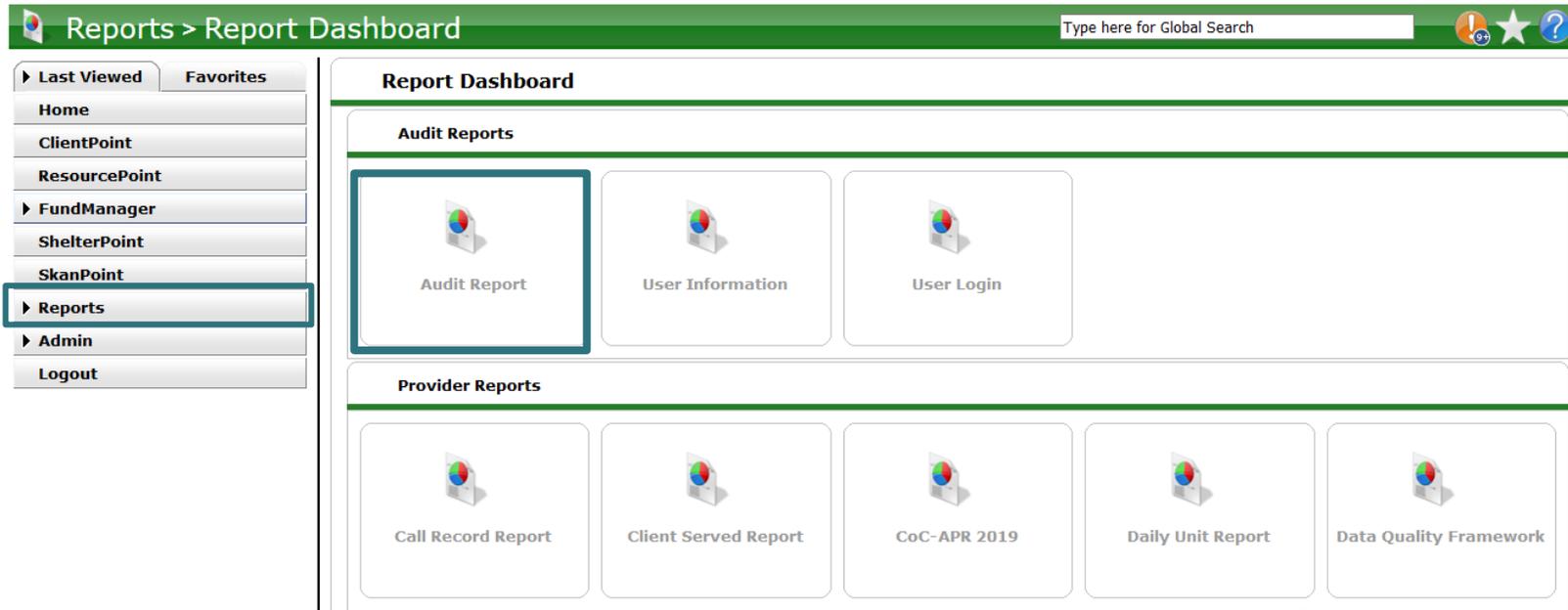
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# How to Run the Audit Report

1. Login to ServicePoint ([hmisncceh.servicept.com](hmisncceh.servicept.com))

2. EDA as the project to run the report for or stay in default for whole agency

3. Click "Reports" on the left side of the Home Page Dashboard

4. On the Report Dashboard, click "Audit Report"

# How to Run the Audit Report

5. The Report Options section has the prompts to run the Audit Report.

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| Prompt | Description | Required? |
|---|---|---|
| Provider | Automatically selected based on EDA mode. Limits the search to data entered by this project.<br>* Special note: if using default EDA for entire agency, check box "Including Subordinates" | Yes |
| User | Search for an HMIS licensed User in your agency to only review a single person's actions. Or skip to include any user. | No |
| Objects | Select different aspects of client records like profile, entry/exit, or services information. Defaults to all objects. | No |
| Entity | Search for a particular client to narrow the review. | No |
| Start Date | The earliest date data was entered for | Yes |
| End Date | The latest date for the search | Yes |
| Action | Skip to include any action. Select create, read, update, delete, or Inactivate to narrow the search. | No |

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# How to Run the Audit Report

6. Click the "Build Report" button. Here is an example of how the prompts look completed:



**Report Options**

| Provider | Heading Home - Rowan County - Rapid Re-Housing - ESG (7390) |
|---|---|
| Including Subordinates | ☐ |
| User | Please choose a user.   [Search] [My User] [Clear] |
| Objects | All object types   [Select] |
| Entity | Han Solo (4)   [Client ▾] [Search] [Clear] |
| Start Date | 01 / 01 / 2021 |
| End Date | 03 / 31 / 2021 |
| Action | -Select- ▾ |

[Download]   [Build Report] [Clear]

* Tip: Allow plenty of time for this report to run. HMIS holds a lot of information and this report can take a while. Narrow the prompts for a faster report!

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# How to Read the Audit Report to troubleshoot

The generated report will detail date/time, what action was taken, who took the action, and what provider were they entering data as.

ID refers to the Entity

**Audit Report**

Sort by clicking the column name

| Date ▲ | Entity | ID# | Action | Target | By User | By Provider |
|---|---|---|---|---|---|---|
| 02/26/2021 (4:31 PM) | Clients | Friday Carey (299) | Create | DaRecordset (8900) | Andrea Carey (5510) | Partners BHM - Multiple BoS Counties - PSH - HUD (5061) |
| 02/26/2021 (4:31 PM) | Clients | Friday Carey (299) | Create | Client Recordset Visibility (13184) | Andrea Carey (5510) | Partners BHM - Multiple BoS Counties - PSH - HUD (5061) |
| 02/26/2021 (4:31 PM) | Clients | Friday Carey (299) | Create | Client Recordset Visibility (13185) | Andrea Carey (5510) | Partners BHM - Multiple BoS Counties - PSH - HUD (5061) |
| 02/26/2021 (4:31 PM) | Clients | Friday Carey (299) | Read | Questions: Disabilities (417) | Andrea Carey (5510) | Partners BHM - Multiple BoS Counties - PSH - HUD (5061) |
| 02/26/2021 (4:31 PM) | | | Read | Clients: Friday Carey (299) | Andrea Carey (5510) | Partners BHM - Multiple BoS Counties - PSH - HUD (5061) |
| 02/26/2021 (4:31 PM) | | | Read | Clients: Friday Carey (299) | Andrea Carey (5510) | Partners BHM - Multiple BoS Counties - PSH - HUD (5061) |

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# How to Read the Audit Report to troubleshoot

Agency Admins can use the Audit Report to:

| Review | On Audit Report |
|---|---|
| Which EDA mode was used | Check for Provider name for follow-up support |
| Who entered data on a client | Check for User name for follow-up support |
| When changes were made, even when backdate mode was used | Check for Date actually entered (in case it was after a report pulled) |
| If a part of the client record was removed | Check Action for "Delete" |
| If deleting or updating something accidentally removed connected data | Check Action for "Inactivate" |

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# How to Share the Audit Report Results

To share the results, download the Audit Report as a Zip File with an Excel csv is located inside.

# Contact NCCEH

hello@ncceh.org

919.755.4393

# Contact NCCEH Data Center Help Desk

hmis@ncceh.org

919.410.6997

NCEndHomelessness

@NCHomelessness

nc_end_homelessness

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