Audit Report

Using Report for Data Monitoring

NC COALITION to end
HOMELESSNESS

Presentation Agenda

By the end, attendees will be able to:
- ✓ Understand the purpose of the report
- ✓ Locate the report in HMIS Dashboard
- ✓ Properly run the report
- ✓ Download the report

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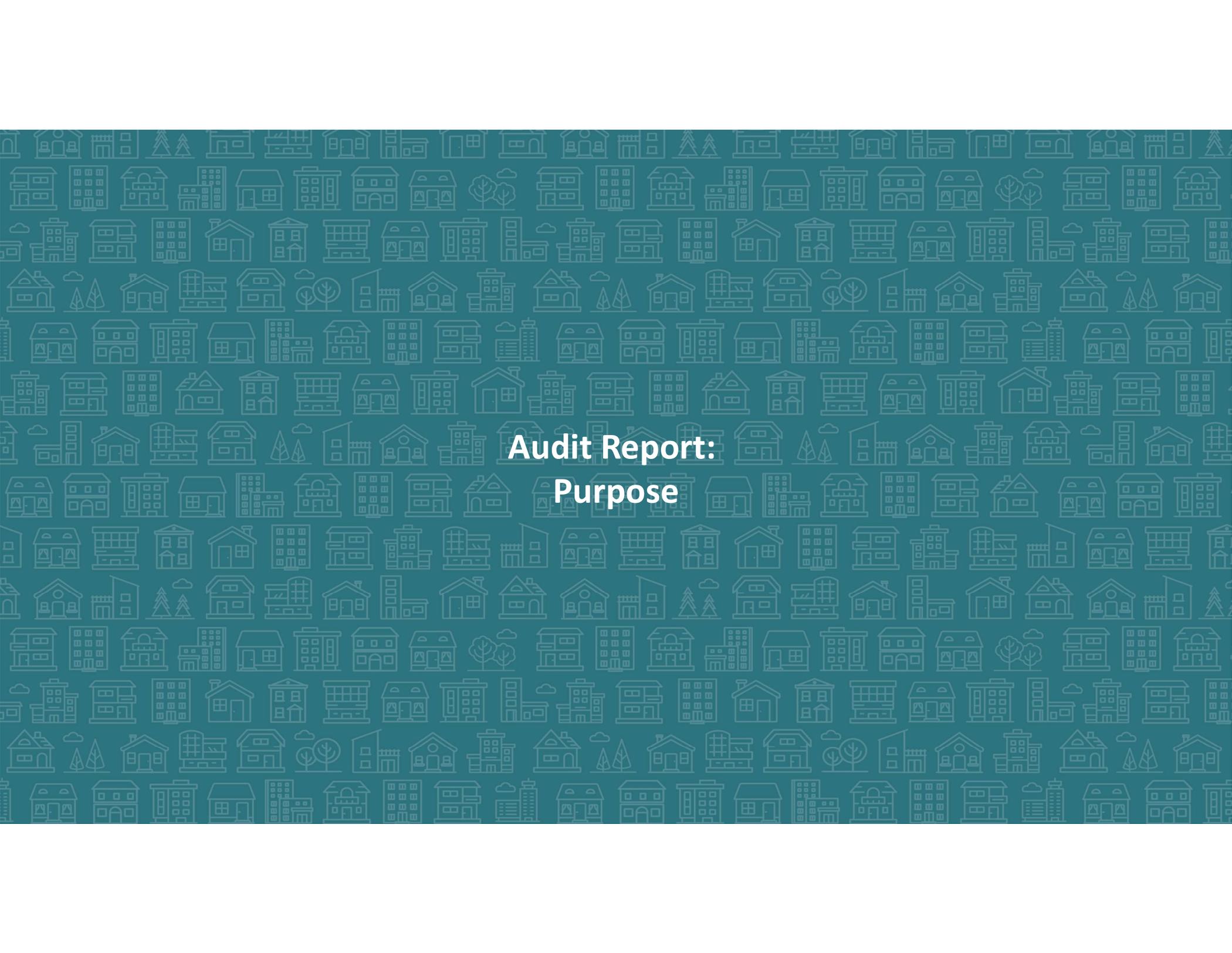
Audit Report:
Purpose

Audit Report

What is the purpose of this report?

- Provides an audit trail of changes within a client record
  - Troubleshoot issues
  - User Changes
  - Provider Updates
  - Investigating Privacy Breaches
- Agency Admin responsibilities include Data Quality as well as Privacy & Security

Helpful Notes

- Only accessible by Agency Admins
- Can only access client information within your visibility

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Audit Report:
Navigation

Navigation Path

Running the Report

Before you Run:

Use EDA mode when running for individual projects

Non-EDA mode when running for the whole agency

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Report Options

- **Provider:** depends on your EDA mode
- **Including Subordinates:** will include all junior projects. Click by default
- **User:** Filter changes by user
- **Objects:** Item change list
- **Entity:** Choose your client
- **Set the Start/End Date**
- **Action:**
  - Create
  - Read
  - Update
  - Delete
  - Inactive

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Objects Selection

Select objects to include in report

- 837p Claim
- Action In Role
- Action Step Visibility
- Action Steps
- Activities
- Activity Attendance
- Entry Exit Reviews
- Entry Exit Visibility

- Entry Exits
- Export837
- Federal Partner Funding Source
- File Attach Good Ext
- File Attachment
- File Attachment Link
- Provider Service Code Modifiers
- Provider Service Code Quicklists

- Provider Service Code Seasonal Information
- Provider Service Code Telephone Numbers
- Provider Service Code Worksheets
- Provider Service Codes
- Provider Service Location
- Provider Service Order

Select All | Clear
Save | Cancel

- Multi-select options available
- Helpful options may include:
  - Entry Exits + Reviews
  - User
  - Services
  - Households + Relationships
  - Assessments + Questions
  - Providers
  - Clients

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Run Your Report

Report Options

Provider	Heading Home - Rowan County - Emergency Shelter (7389)	Search	My Provider	Clear
Including Subordinates	☐			
User	Dashia Shanks (10399)	Search	My User	Clear
Objects	Entry Exits	Select		
Entity	Han Solo (4)	Client ⌄	Search	Clear
Start Date	07 / 04 / 2023 📅 ↺ 📅			
End Date	07 / 05 / 2024 📅 ↺ 📅			
Action	Update ⌄			

Download   **Build Report**   Clear

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Audit Report:
Reading the Report

Reviewing the Report

Report tabs will show:
- Data/Time
- what action was taken
- who took the action
- what provider was using EDA

Audit Report

	Date	Entity	ID#	Action	Target	By User	By Provider ▲
🔍	04/16/2024 (10:10 PM)	Clients	Phillip Halpert (529)	Create	DaRecordset (16177)	Dashia Shanks (10399)	Heading Home - Rowan County - SSVF (20569)
	04/16/2024 (10:10 PM)	Clients	Phillip Halpert (529)	Read	Questions: Disabilities (417)	Dashia Shanks (10399)	Heading Home - Rowan County - SSVF (20569)
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Audit Report vs History Color Bar?

- The Audit Report will assess a wide net while the History Color Bar is useful for specific fields/responses
- The Audit Report provides a broader look into changes
- History color bar looks at specifics field while audit report looks at categories
- Can be tedious to find information using the History Color Bar especially if you can't diagnose the issue

• The Audit Report can be helpful to look at data updates for one day or a specific range

Resources

How to Run and Read the Audit Report in HMIS

Using the History Color Bar to View and Edit Prior Responses

HMIS@NCCEH Agency Administrator Roles and Responsibilities

About Us - Data Center Forms

HMIS Monthly Training: Advanced Corrections with History Color Bar

HMIS Monthly Training: Advanced Corrections with History Color Bar - Slides

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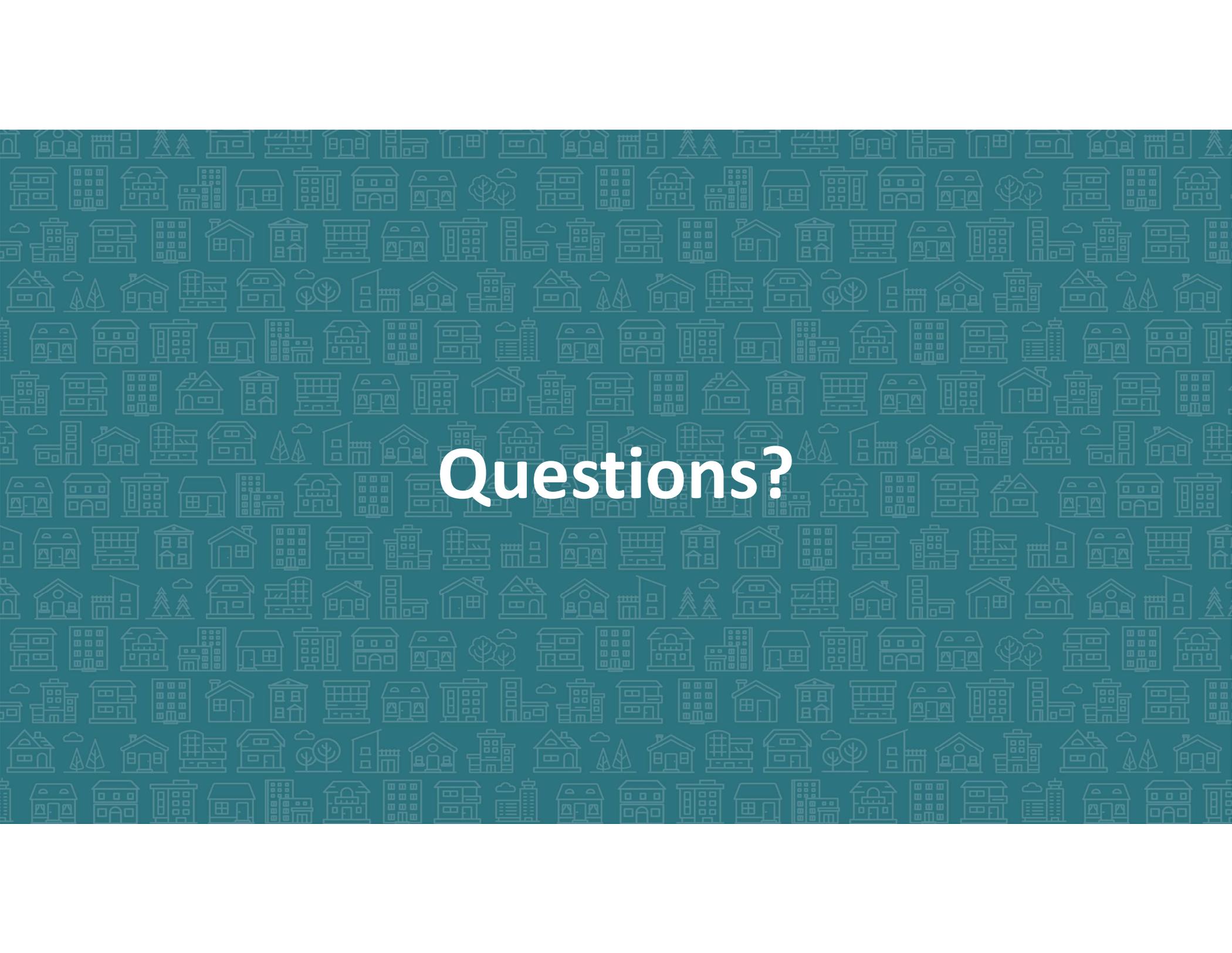
Questions?

Contact NCCEH
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Contact NCCEH Data Center Help Desk
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