

### Important Content Update Message

We are currently updating the OP Help Center content for OP 20. We appreciate your patience as we continue to make these updates. To locate the version of your software, navigate to: **Help tab > About**

# Protecting Patient Data FAQs

Last Modified on 02/08/2021 1:13 pm EST

## How do I view security audit trail?



**User Permission:** You must be assigned the AA\_SystemAdmin\_mi permission from the Security Settings window (Utilities > System Admin > Security Administration) in order to access the Security Audit Trail. Only a system administrator can assign permissions. Contact your system administrator to be assigned this permission.

### To view the Audit Trail

1. Navigate to **Utilities > System Admin > Security Audit Trail**
2. Locate and select the patient's Audit Log that you would like to view.



**Note:** Use the Available Columns button (☰) to add or remove columns from view. You will most likely want to select the **Before Changes** and **After Changes** checkboxes to add those columns to your view.

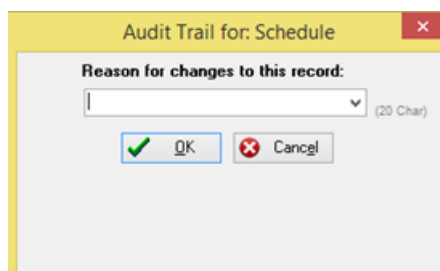
### Exporting the Audit Trail to PDF

1. Select the Print icon
2. When the Print Preview appears, select Export to PDF
3. Save Audit Trail report
4. Complete the Disclosure Tracking Screen as appropriate

## How do I add reasons for record changes?

**Path: Practice Management tab > Coded Tables**


When performing a deletion action in OP, such as the deletion of an appointment, you are prompted to select a reason for the record change that will be recorded in the Audit Trail.








OP comes installed with three reasons for change:

- Patient too old
- Setup
- Test


To add an additional reason, you can simply type the reason in the reason field (pictured above). After entering your reason and clicking **OK**, the reason will be saved for future use.

 **Note:** Because all reasons entered in this field will be saved as they are entered, this drop-down menu may get very large. The following steps will show you how to perform maintenance on this list.

The record change reasons are all housed in a code table that will give you the ability to add reasons, delete reasons, and archive reasons. Your practice administrator or an authorized user should maintain this code table. To manage the code table:

1. Navigate to **Practice Management tab > Coded Values** The Code Tables window is displayed.
2. In the Code Table Purpose pane, select **Record change/delete reason**.
3. The reasons in your database will be listed in the lower window pane. From this pane you can perform the following:
  - **Add** a reason: Click the **Insert Record** button  and enter a new reason description and sort number.
  - **Delete** a reason: Click the **Delete Record** button . The reason will be immediately deleted.
  - **Edit** a reason: Select the reason and click the **Edit Record** button . After you have completed your edit, click the **Post Edit** button .
  - **Archive** a reason, select the Archived checkbox for each reason you would like to archive and then click the **Post Edit** button .

## How can I see who added a Patient Contact record?

 **User Permission:** You must be assigned the AA\_SystemAdmin\_mi permission from the Security Settings window (Utilities > System Admin > Security Administration) in order to access the Security Audit Trail. Only a system administrator can assign permissions. Contact your system administrator to be assigned this permission.

### To view a Patient Contact audit record

1. Navigate to **Utilities > System Admin > Security Audit Trail**
2. Select the patient's Audit Log that you would like to view.
3. Locate **Register\_Contact** on the Audit Log.
4. View the **Reason** column for record changes.

04/25/2019 03:22 PM	305: Testdoc Susan	5019 Register_Contact	SYSTEM UPDATE
04/25/2019 03:22 PM	305: Testdoc Susan	5019 Register_Contact	RECORD CREATION