

PHI Audit User Guide

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PHI AUDIT OVERVIEW



Only community users with selected roles can access PHI Audit. For questions about PHI Audit access, contact your community administrator.

The PHI Audit application enables you to audit:

- Access to operations on a selected patient's data
- A selected user's access to, and operations on, patient data

The purpose of the audit tool is to review users' accesses of Protected Health Information to verify accesses are in line with HIPAA requirements.

PHI Audit allows you to:

- Audit a specific patient's data to retrieve information about auditable actions that have been performed on the data.
- Audit a specific user's actions to determine whose data they have accessed, and which auditable actions they performed on the data.

Auditable Actions

PHI Audit retrieves information associated with actions described in the following table. You can select one or more actions when you create an audit.

Audit Type	Audited Action	Description
Patient	Patient Search Results	Includes the search results from which the patient was selected.
Patient	Patient Consent	Displays the consent selection that was selected for access to patient data.
Patient	Patient Opt In	Indicates if the Opt In setting was changed.
Patient	Patient Opt Out	Indicates if the Opt Out setting was changed.
Patient	Patient PHI Access	Displays the viewed patient data.
User	Patient Consent	Displays the consent selection the user selected to access patient data.
User	Patient Search Criteria	Audits the criteria used to search for a patient.
User	Patient Search Results	Audits the search results from which the user selected a patient.

User	Patient Opt In	Indicates if the user changed the Opt In setting.
User	Patient Opt Out	Indicates if the user changed the Opt Out setting.
User	Patient PHI Access	Indicates which tabs of patient data the user accessed.

Navigating the PHI Audit Dashboard



Important: As you perform tasks with the PHI Audit Dashboard, **use the application's buttons to navigate**. Do not use your browser's back button. If you use your browser's back button for navigation, you may be returned to your healthcare community home page.

Examples of application buttons:

Back to the main audit page

Back to the audit details page

You can quickly initiate audit tasks from the Audit Dashboard window. To access tasks, scroll up or down the window as required to reach the section that supports the tasks you want to perform.

In sections that display information in columns, you can sort the information by clicking column headings. Multiple clicks on a heading toggle the sort order between ascending and descending sequence.

Audit Dashboard

Start a new audit

Select an audit type below and follow the steps to schedule your audit request. Queued audits appear below.

[Patient audit](#) [User audit](#)

Scheduled audits

The following audits have been queued and will be processed as soon as possible. You may cancel your request or wait for results to show up in the Processed Audits below.

Cancel	Audit name	Request date
There are no scheduled audits at this time.		

0 reports

[Cancel checked](#)

Processed audits

The following audits have been processed and are ready to be viewed. You may delete audit reports or they will **automatically be deleted after 30 days** from being processed.

Delete	Audit name	Request date	Processed date
<input type="checkbox"/>	Winds, Nancy - user	01/11/2012 09:31 AM	01/11/2012 09:31 AM
<input type="checkbox"/>	Davis, Bob - patient	01/03/2012 11:36 AM	01/03/2012 11:36 AM
<input type="checkbox"/>	Winds, Nancy - user	12/18/2011 05:30 AM	12/18/2011 05:31 AM
<input type="checkbox"/>	Davis, Bob - patient	12/18/2011 05:28 AM	12/18/2011 05:28 AM
<input type="checkbox"/>	Davis, Bob - patient	12/16/2011 12:46 PM	12/16/2011 12:46 PM

22 reports

[Delete checked](#)

The *Start a new audit* section provides access to two wizards used to create patient or user audits. For details, refer to:

- Create a Patient Audit
- Create a User Audit

The *Scheduled audits* section allows you to view or cancel audits that have not been submitted for system processing. For details, refer to [View or Cancel Scheduled Audits](#).

The *Processed audits* section allows you to view and delete processed audits. For details, refer to:

- View a Processed Audit
- Download Audit Data as CSV
- Delete Processed Audits

ACCESS PHI AUDIT



Only community users with selected roles can access PHI Audit. For questions about PHI Audit access, contact your community administrator.

The method used to access PHI Audit can vary depending on your system configuration. If you are not sure how to navigate to PHI Audit, contact your community administrator.

Perform the following steps to access PHI Audit:

1. Access your health care community using the URL provided by your organization. Your healthcare community login page displays.

A screenshot of a web form titled "Registered Users Login". It contains two input fields: "User ID" and "Password", each with a blue border. Below the "Password" field is a blue "Login" button. At the bottom of the form, there are two links: "Forgot your Password?" and "Forgot your User ID?", each preceded by a small blue square bullet point.

2. Enter your User ID and Password, then click **Login**. Your health care community home page displays.
3. Navigate to the *PHI Audit Dashboard* screen. For example, click **Audit** on the community home page navigation bar. The *PHI Audit Dashboard* window displays.



This step can vary, depending upon your system configuration. If you are not sure how to navigate to the PHI Audit Dashboard window, contact your community administrator.

Audit Dashboard

Start a new audit

Select an audit type below and follow the steps to schedule your audit request. Queued audits appear below.

Patent audit

User audit

Scheduled audits

The following audits have been queued and will be processed as soon as possible. You may cancel your request or wait for results to show up in the Processed Audits below.

Cancel

Audit name

Request date

There are no scheduled audits at this time.

0 reports

Cancel scheduled

Processed audits

The following audits have been processed and are ready to be viewed. You may delete audit reports or they will automatically be deleted after 30 days from being processed.

Delete

Audit name

Request date

Processed date

☐

[Winds, Nancy - user](#)

01/11/2012 09:31 AM

01/11/2012 09:31 AM

☐

[Davis, Bob - patient](#)

01/03/2012 11:36 AM

01/03/2012 11:36 AM

☐

[Winds, Nancy - user](#)

12/18/2011 05:30 AM

12/18/2011 05:31 AM

☐

[Davis, Bob - patient](#)

12/18/2011 05:28 AM

12/18/2011 05:28 AM

☐

[Davis, Bob - patient](#)

12/16/2011 12:46 PM

12/16/2011 12:46 PM

22 reports

Delete checked

RESULT

You have successfully accessed PHI Audit.

CREATE A PATIENT AUDIT

Create a *Patient audit* when you want to audit PHI data actions for a selected patient.

This procedure assumes you have logged in to your healthcare community and navigated to the *PHI Audit Dashboard* window. For details, refer to *Access PHI Audit*.



The screenshot shows the 'Audit Dashboard' window. At the top, it says 'Start a new audit' and 'Select an audit type below and follow the steps to schedule your audit request. Queued audits appear below.' There are two buttons: 'Patient audit' (highlighted in blue) and 'User audit'. Below this, it says 'Scheduled audits' and 'The following audits have been queued and will be processed as soon as possible. You may cancel your request or wait for results to show up in the Processed Audits below.' There is a table with columns 'Cancel', 'Audit name', and 'Request date'. The table is empty, and it says 'There are no scheduled audits at this time.' At the bottom, it says '0 reports' and 'Cancel checked'.

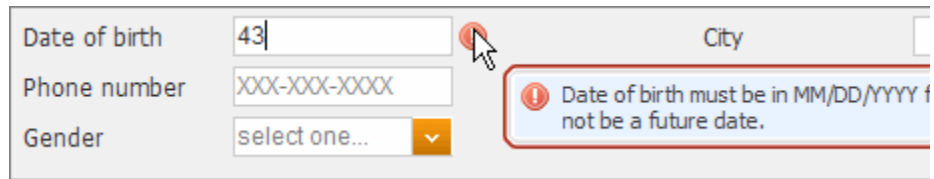
Perform the following steps to create a patient PHI Audit:

1. On the *PHI Audit Dashboard* window, click **Patient audit**. Step 1 of the *Patient Audit Wizard* popup displays.


The screenshot shows the 'Patient Audit Wizard' window. It has a title bar 'Patient Audit Wizard' and a close button. The main heading is 'Patient audit: search for a patient'. Below it, it says 'Search for a patient to view their audit history. * = required fields'. There are three steps: 1 (highlighted in blue), 2, and 3. The form has the following fields: First name, Last name, Date of birth (MM/DD/YYYY), Phone number (XXX-XXX-XXXX), Gender (select one...), Address 1, Address 2, City, and Zip code. At the bottom, there are two buttons: 'Search for patients' and 'Exit wizard'.

2. Enter your search criteria. Your search criteria may vary, depending on your system configuration.

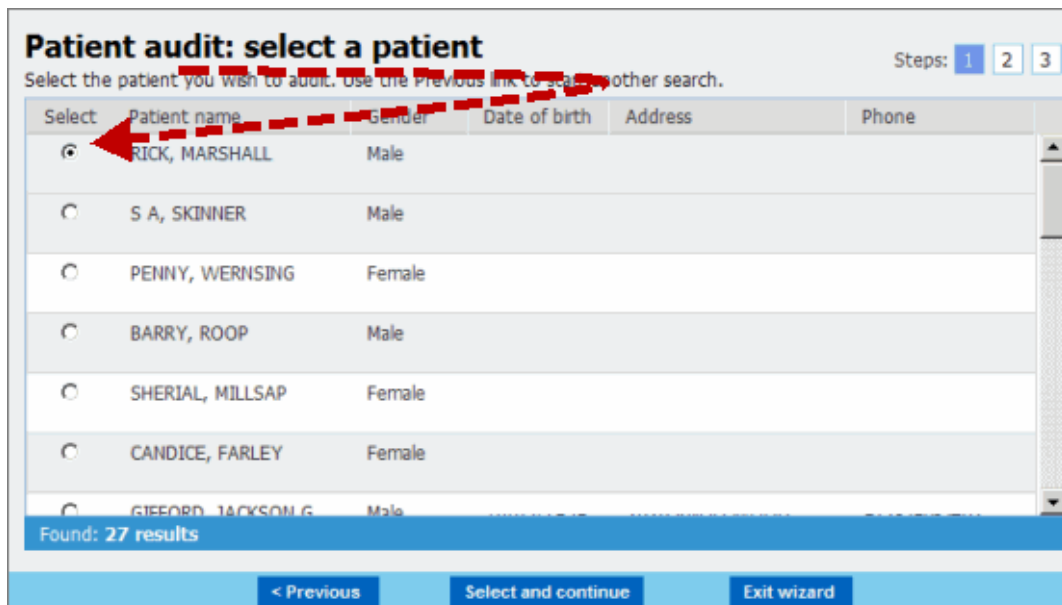
 If you enter search criteria in an invalid format, the  error indication displays. Hold your cursor over the indicator for details.



Date of birth	43	City	
Phone number	XXX-XXX-XXXX		
Gender	select one...		

 Date of birth must be in MM/DD/YYYY format. It cannot be a future date.

3. When you are Finished entering search criteria, click **Search for patients**. If your search returns no results, or unexpected results, modify your search criteria and try again. Otherwise, the search results display in the *Patient Audit Wizard Step 1* popup.



Patient audit: select a patient Steps: 1 2 3

Select the patient you wish to audit. Use the [Previous](#) link to search for another search.

Select	Patient name	Gender	Date of birth	Address	Phone
<input checked="" type="radio"/>	RICK, MARSHALL	Male			
<input type="radio"/>	S A, SKINNER	Male			
<input type="radio"/>	PENNY, WERNING	Female			
<input type="radio"/>	BARRY, ROOP	Male			
<input type="radio"/>	SHERIAL, MILLSAP	Female			
<input type="radio"/>	CANDICE, FARLEY	Female			
<input type="radio"/>	GIEFORD, JACKSON G	Male			

Found: 27 results

< Previous Select and continue Exit wizard

4. Select the patient whose PHI data you want to audit.
5. Click **Select and continue**. Step 2 of the *Patient Audit Wizard* popup displays.

Patient audit: select audit actions Steps: 1 2 3

Select the date range and auditable actions you wish to see for this patient. * = required fields

Selected Patient: RICK, MARSHALL

Date range * 01/13/2011 to 01/13/2012


Audit actions *

- ☒ Patient Consent
- ☒ Patient Opt-In
- ☒ Patient Opt-Out
- ☒ Patient Search Results
- ☒ Patient Search Criteria
- ☒ Patient PHI Access

< Previous Select and review Exit wizard

6. Specify a date range for the audit.

Note: The date range must be no more than 30 days.

- Enter dates in the required format, or
 - Click the  drop down arrow to display a calendar from which you can select a date.
7. Select the **Audit actions** you want to include in the PHI patient data audit. For more information, refer to PHI Audit Overview.
 8. Click **Select and review**. Step 3 of the *Patient Audit Wizard* popup displays.

Patient audit: review and schedule your selections Steps: 1 2 3

Modify your selections as needed and schedule the audit.

Patient

RICK, MARSHALL Male iPER, TX 75078

Date Range 01/13/2012 to 01/13/2012

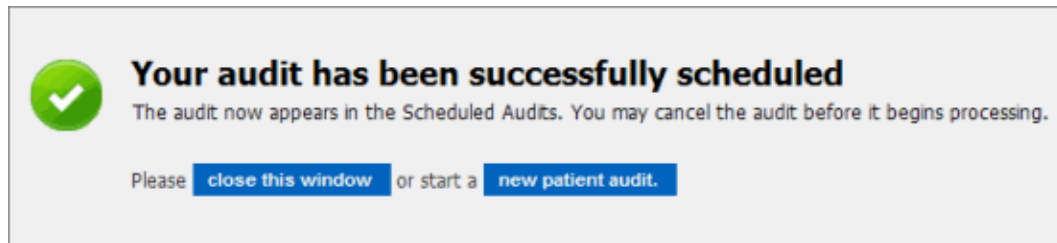
Email Me When Processed tester@covisint.com Clear

Auditable Actions

- ☒ Patient Consent
- ☒ Patient Opt-In
- ☒ Patient Opt-Out
- ☒ Patient Search Results
- ☒ Patient Search Criteria
- ☒ Patient PHI Access

< Previous Schedule audit Exit wizard

9. Review your audit's date range and Audit actions criteria, and modify as required.
10. Optional - modify the *Email Me When Processed* field.
 - If you want to use the default email address for notification emails, leave the field as-is.
 - If you want the notification email to go to a different email address, click **Clear**, then enter the alternate email address.
11. Click **Schedule audit**. The audit is scheduled, and a success window, similar to the following displays.



12. Click **close this window**. The audit wizard window closes and you are returned to the *PHI Audit Dashboard* window.

RESULT

You have successfully created and scheduled a PHI patient data audit.

CREATE A USER AUDIT

Create a *User audit* when you want to audit PHI data actions performed by a selected user.

This procedure assumes you have logged in to your healthcare community and navigated to the *PHI Audit Dashboard* window. For details, refer to *Access PHI Audit*.

The screenshot shows the 'Audit Dashboard' window. It has a title bar with a close button. The main content area is divided into two sections. The first section, 'Start a new audit', includes a sub-header and a description: 'Select an audit type below and follow the steps to schedule your audit request. Queued audits appear below.' Below this are two buttons: 'Patient audit' and 'User audit', both with question mark icons. The second section, 'Scheduled audits', has a sub-header and a description: 'The following audits have been queued and will be processed as soon as possible. You may cancel your request or wait for results to show up in the Processed Audits below.' Below this is a table with columns 'Cancel', 'Audit name', and 'Request date'. The table is currently empty, with the text 'There are no scheduled audits at this time.' displayed. At the bottom of the window, there is a blue bar with the text '0 reports' and a 'Cancel checked' button.

Perform the following steps to create a user PHI Audit:

1. On the *PHI Audit Dashboard* window, click **User audit**. Step 1 of the *User Audit Wizard* popup displays the list of available users within your organization.

The screenshot shows the 'User audit: select a user' wizard. It has a title bar with a close button. The main content area has a sub-header 'User audit: select a user' and a description: 'Select a user for the selected organization to perform an audit. * = required fields'. Below this is a dropdown menu labeled 'Organization * < Your Organization >'. Below the dropdown is a table with columns 'Select', 'name', 'User Id', and 'Email'. The table contains three rows: 'Auto Approve' with User Id '8BCC' and Email 'normal', 'Carlo Alo' with User Id 'CARL' and Email 'carl', and 'Nancy Winds' with User Id 'BAYL' and Email 'sus'. The 'Nancy Winds' row is selected, indicated by a radio button and a red dashed arrow pointing to it. At the bottom of the window, there is a blue bar with the text 'Found: 3 results' and two buttons: 'Select admin and continue' and 'Exit wizard'.

2. Select the user you want to audit.

- Click **Select admin and continue**. Step 2 of the *User Audit Wizard* popup displays.

User audit: select audit actions Steps: 1 2 3

Select the date range and auditable actions you wish to see for this user. * = required fields


Selected User: Nancy Winds

Date range * 01/13/2012 to 01/13/2012

Audit actions *

- ☒ Patient Consent
- ☒ Patient Opt-In
- ☒ Patient Opt-Out
- ☒ Patient Search Results
- ☒ Patient Search Criteria
- ☒ Patient PHI Access

< Previous Select and review Exit wizard

- Specify a date range for the audit. **Note:** The date range must be no more than 30 days.
 - Enter dates in the required format, or
 - Click the  drop down arrow to display a calendar from which you can select a date.
- Select the **Audit actions** you want to include in the PHI user data audit. For more information, refer to PHI Audit Overview.
- Click **Select and review**. Step 3 of the *User Audit Wizard* popup displays.

User audit: review and schedule your selections Steps: 1 2 3

Modify your selections as needed and scheduled the audit.

User

Nancy Winds USER078

Date Range 01/13/2012 to 01/13/2012

Email Me When Processed ester@covisint.com Clear

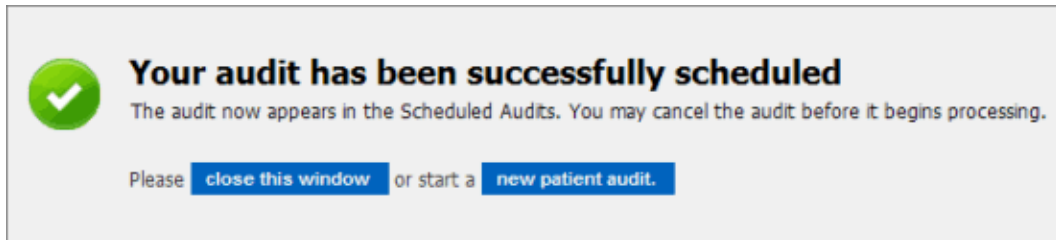
Auditable Actions

- ☒ Patient Consent
- ☒ Patient Opt-In
- ☒ Patient Opt-Out
- ☒ Patient Search Results
- ☒ Patient Search Criteria
- ☒ Patient PHI Access

< Previous Schedule audit Exit wizard

- Review your audit's date range and *Audit actions* criteria, and modify as required.

8. Optional - modify the *Email Me When Processed* field.
 - If you want to use the default email address for notification emails, leave the field as-is.
 - If you want the notification email to go to a different email address, click **Clear**, then enter the alternate email address.
9. Click **Schedule audit**. The audit is scheduled, and a success window, similar to the following displays.



10. Click **close this window**. The audit wizard window closes and you are returned to the *PHI Audit Dashboard* window.

RESULT

You have successfully created and scheduled a PHI user data audit.

VIEW OR CANCEL SCHEDULED AUDITS



Audits display in the *Scheduled audits* section of the Audit Dashboard window only until they are processed. Audits are processed as soon as possible.

You may not be able to view or cancel scheduled audits, because they have already been moved into the processing phase.

View *Scheduled audits* when you want to:

- Review the list of audits that have not been submitted for system processing.
- Cancel scheduled audits so they are not submitted for system processing.

This procedure assumes you have logged in to your healthcare community and navigated to the PHI *Audit Dashboard* window. For details, refer to Access PHI Audit.

The screenshot shows the 'Audit Dashboard' window. At the top, there's a section 'Start a new audit' with instructions to select an audit type (Patient audit or User audit) and follow steps to schedule a request. Below this is the 'Scheduled audits' section, which states that queued audits will be processed as soon as possible and can be canceled. A table lists two scheduled audits: 'RICK, MARSHALL - patient' with a request date of 01/13/2012 02:49 PM, and 'Winds, Nancy - user' with a request date of 01/11/2012 09:31 AM. Each row has a 'Cancel' checkbox. Below the table, it says '0 reports' and a 'Cancel checked' button.

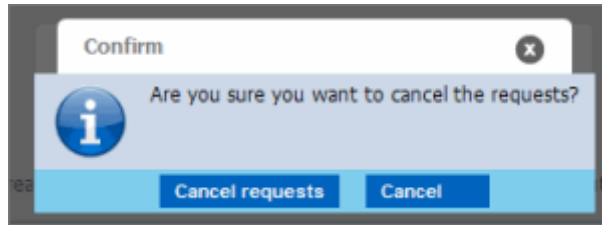
Cancel	Audit name	Request date
<input type="checkbox"/>	RICK, MARSHALL - patient	01/13/2012 02:49 PM
<input type="checkbox"/>	Winds, Nancy - user	01/11/2012 09:31 AM

0 reports

Cancel checked

Perform the following steps to view *Scheduled audits*:

1. On the PHI *Audit Dashboard* window, scroll down the screen as required to view the **Scheduled audits** section.
 - The list of scheduled audits displays, or
 - The "There are no scheduled audits as this time" message displays,
2. Review the list of scheduled audits as required. If you want to cancel scheduled audits, continue to the next step.
3. Check the **Cancel check box** of each audit you want to cancel.
4. Click **Cancel checked**. A confirmation dialog displays.



5. Click **Cancel requests**. The checked audits are cancelled, and will not be submitted for system processing.

RESULT

You have successfully cancelled a scheduled PHI Audit.

VIEW A PROCESSED AUDIT

View *Processed audits* when you want to:

- Review the list of audits that have been processed.
- View audit details.

This procedure assumes you have logged in to your healthcare community and navigated to the *PHI Audit Dashboard* window. For details, refer to *Access PHI Audit*.

Processed audits
The following audits have been processed and are ready to be viewed. You may delete audit reports or they will **automatically be deleted after 30 days** from being processed.

Delete	Audit name	Request date	Processed date
	Winds, Nancy - user	01/13/2012 03:49 PM	01/13/2012 03:49 PM
	RICK, MARSHALL - patient	01/13/2012 02:49 PM	01/13/2012 02:49 PM
	Winds, Nancy - user	01/11/2012 09:31 AM	01/11/2012 09:31 AM
	Davis, Bob - patient	01/03/2012 11:36 AM	01/03/2012 11:36 AM
	Winds, Nancy - user	12/18/2011 05:30 AM	12/18/2011 05:31 AM

24 reports

Delete checked

Patient or User name, and audit type (patient or user)

Perform the following steps to view *Processed audits*:

1. On the *PHI Audit Dashboard* window, scroll down the screen as required to view the **Processed audits** section.
2. Sort the audit list as required by clicking column headings. For details, refer to *Navigating the PHI Audit Dashboard*.
3. Click the **Audit name** link of the audit whose information you want to view. The *Audit Details* view displays in the Audit Dashboard window. The fields available in the Audit Details view are dependent upon the audit type:
 - Patient audit view
 - User audit view

An example Patient Audit excerpt is shown below.

Date of action	User	Action	Additional details
12/15/2011 07:14 PM	Norm	Patient Search Results	Details
12/15/2011 05:12 PM	Norm	Patient PHI Access	Details

4. [Optional] If you want to see more information about an audit action, click its **Details** button. The action's details display in a new window.



[Optional] Click **Create PDF** file to save the audit action details as a PDF.

Patient Summary
Created On: December 15, 2011

Patient: Bob Davis ID: 1000001000

Date of Birth: August 12, 1975 Gender: Male

Guardian: Next of Kin:

Table of Contents

Allergies and Adverse Reactions Immunizations Medications Problems Surgeries/Procedures

Allergies and Adverse Reactions

Type	Substance	Reaction
UNK	UNK	Nausea
UNK	UNK	Wheezing
UNK	UNK	Hives

Immunizations

Vaccine	Date
Tetanus_and_diphtheria_toxoids	01/01/1997 12:00:00
Influenza_virus_vaccine	12/01/1998 12:00:00
Pneumococcal_polysaccharide_vaccine	12/01/1998 12:00:00
Influenza_virus_vaccine	11/01/1999 12:00:00

Medications

Medication	Start Date
Cephalexin 500 MG oral tablet	
Prednisone 20 MG oral tablet	
Clopidogrel 75 MG oral tablet	
Metoprolol 25 MG oral tablet	
Albuterol 0.09 MG/ACTUAT inhalant solution	

Problems

Code	Display Name	Description	Effective Dates

Create PDF file Close window

- When you are finished viewing audit action details, click **Back to the audit details** page. The list of audit details displays in the Audit Dashboard window.
- When you are finished viewing audit details, click **Back to the main audit page**. The PHI Audit Dashboard page displays.

RESULT

You have successfully viewed a PHI audit.

PATIENT AUDIT DETAILS SCREEN

Patient Audit Details
You may also download this information as a .csv file to your computer. Please note that this audit will automatically be deleted after 30 days.

Patient 1

Davis, Bob 36 years (08/12/1975) Male

Phone: --

Employer: -- Insurance: -- PCP: --
Phone2: -- Phone3: --

[Download .csv of audit](#)

Date of action ▼	User	Action	Additional details
12/15/2011 07:14 PM	Norm	Patient Search Results	Details
12/15/2011 05:12 PM	Norm	Patient PHI Access	Details
12/15/2011 05:12 PM	Norm	Patient PHI Access	Details
12/15/2011 05:12 PM	Norm	Patient Search Results	Details
12/15/2011 05:04 PM	Norm	Patient Search Results	Details
12/15/2011 11:47 AM	Norm	Patient PHI Access	Details

2

The Patient Audit Details screen is organized in two sections:

1. The patient section displays a summary that includes the patient's name and other key information.
2. The auditable actions section displays a row for each included action.
 - Date on which the action occurred.
 - The user who performed the action.
 - The action name.
 - [Optional] A link to additional details about the action.

From the screen, you can:

- Download the audit data in CSV (Comma Separated Values) format.
- Delete the audit.
- View action details by clicking a Details button.
- Return to the main audit page by clicking the [Back to the main audit page](#) button.

USER AUDIT DETAILS SCREEN

User Audit Details
You may also download this information as a .csv file to your computer. Please note that this audit will automatically be deleted after 30 days.

User

Name **Carli** Organization
User ID **CARLI** Email
Phone

[Download .csv of audit](#)

Date of action ▼	Patient	Action	Additional details
12/15/2011 06:42 PM	DORIS A ROGERS	Patient Search Results	Details
12/15/2011 05:55 PM	DORIS A ROGERS	Patient Search Results	Details
12/15/2011 05:14 PM	TOM D SMITH	Patient PHI Access	Details
12/15/2011 05:14 PM	TOM D SMITH	Patient PHI Access	Details
12/15/2011 05:14 PM	TOM D SMITH	Patient PHI Access	Details
12/15/2011 05:14 PM	TOM D SMITH	Patient PHI Access	Details
12/15/2011 05:14 PM	TOM D SMITH	Patient PHI Access	Details
12/15/2011 05:13 PM	TOM D SMITH	Patient PHI Access	Details
12/15/2011 05:13 PM	TOM D SMITH	Patient PHI Access	Details

The User Audit Details screen is organized in two sections:

1. The user section displays a summary that includes the user's name and other key information.
2. The auditable actions section displays a row for each included action. The row includes:
 - The date on which the action occurred.
 - The patient on whose data the action was performed.
 - The action name.
 - [Optional] A link to additional details about the action.

From the screen, you can:

- Download the audit data in CSV (Comma Separated Values) format.
- Delete the audit.
- View action details by clicking a Details button.
- Return to the main audit page by clicking the [Back to the main audit page](#) button.

DOWNLOAD AUDIT DATA AS CSV

You can download an audit in CSV format. CSV format files can be opened using spreadsheet software such as Microsoft Excel. There is more information in the CSV format files than can be viewed from the Audit Dashboard user interface.

Perform the following steps to download audit data in *.CSV format:

1. In the Processed audits section, click the Audit name link of the audit you want to download. The patient or user *Audit details* display. For details, refer to View a Processed Audit.

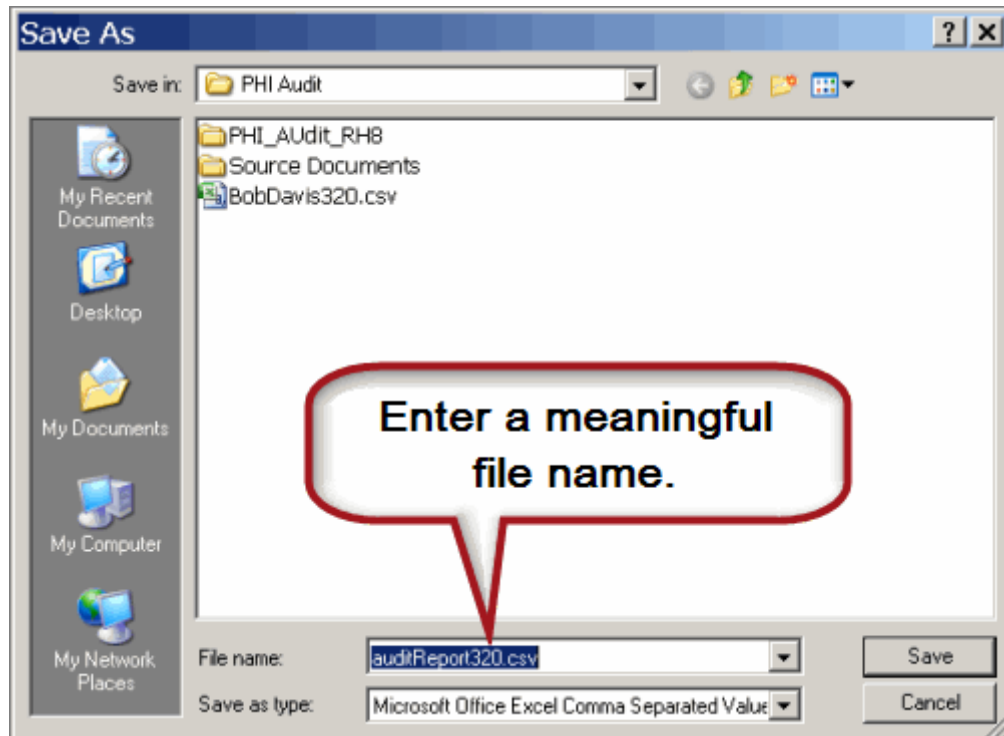
Patient Audit Details
You may also download this information as a .csv file to your computer. Please note that this audit will automatically be deleted after 30 days.

Patient
Davis, Bob
36 years (08/12/1975) Male
Phone: --

Employer: -- Insurance: -- PCP: --
Phone2: -- Phone3: --

Date of action	User	Action	Additional details
12/15/2011 07:14 PM	Norm	Patient Search Results	Details
12/15/2011 05:12 PM	Norm	Patient PHI Access	Details
12/15/2011 05:12 PM	Norm	Patient PHI Access	Details

2. Click **Download .csv of audit**. A *File Download* dialog displays.
3. In the File Download dialog, click **Save**. A *Save As* dialog, similar to the following displays.



4. In the Save As dialog:
 - Navigate to the folder in which you want to save the *.csv file.
 - Enter a meaningful *.csv file name.
 - Click **Save**. The file is saved to the location you selected.
5. To view the saved file, open it with a spreadsheet program such as Microsoft Excel.

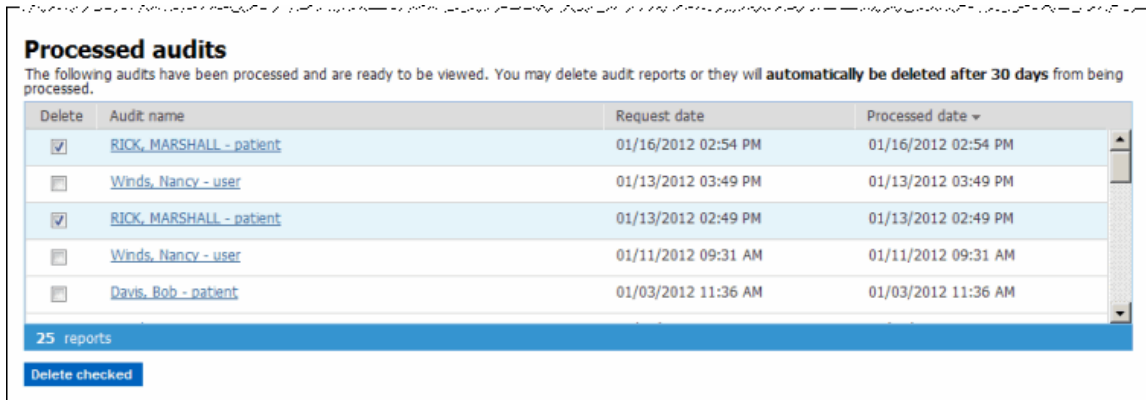
RESULT

You have successfully downloaded and viewed a PHI audit in *.csv format.

DELETE PROCESSED AUDITS

Audits are automatically deleted after a configurable amount of time. Perform this procedure when you want to delete audits before they are automatically deleted.

This procedure assumes you have logged in to your healthcare community and navigated to the *PHI Audit Dashboard* window. For details, refer to *Access PHI Audit*.

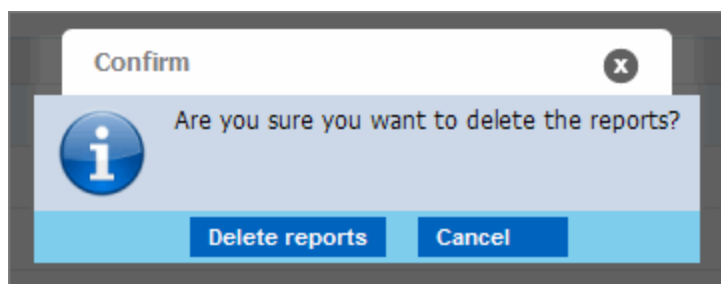


Perform the following steps to delete audits before they are automatically deleted:

1. Scroll down through the Audit Dashboard window to the **Processed audits** section.

Note: The screen shot indicates the example system is configured to delete audits after 30 days.

2. Check the **Delete check box** of each audit you want to delete..
3. Click **Delete checked**. A confirmation dialog, similar to the following, displays.



4. Click **Delete reports**. The audits are deleted. The *Processed audits* section refreshes.

RESULT

You have successfully deleted processed audits.

GLOSSARY

C

CSV: Comma Separated Values. A plain text format for storing tabular data. Files in CSV format can be opened by spreadsheet software such as Microsoft Excel.

H

HIPAA: The Health Insurance Portability and Accountability Act.

P

PHI: Protected Health Information - information that must be secured to meet HIPAA requirements.