Search Change Details

Purpose	Review changes to client records by date, user, provider, table, and record identifier so data edits and unexpected report results can be investigated.
Who should do this	CAREWare administrators, data managers, security or compliance staff, report builders, or designated support staff with access to Central Administration and Administrative Reports.
Use this report when	A client-level change must be audited, a recent data edit must be located, or a custom report result changed unexpectedly and the underlying data history needs review.
Main warning	The Date column is the date and time the record was changed, not necessarily the effective date of the underlying service, eligibility, clinical, or demographic record. Results and exports may contain sensitive identifiers and user activity.
Video walkthrough	Search Change Details Video

Quick path

Central Administration > Reports > Administrative Reports > Search Change Details > Edit > set date and provider > Save > Run Report

Before you begin

- Determine which providers are required for review for any changes made in CAREWare.
- Identify the date range and provider to review. Start with a short, focused period when investigating one event.

Important
Search Change Details is an Administrative Report, not a custom report definition. Use it to correlate data edits with a reporting issue.

Open Search Change Details

Step 1. **In Central Administration, click Reports.**

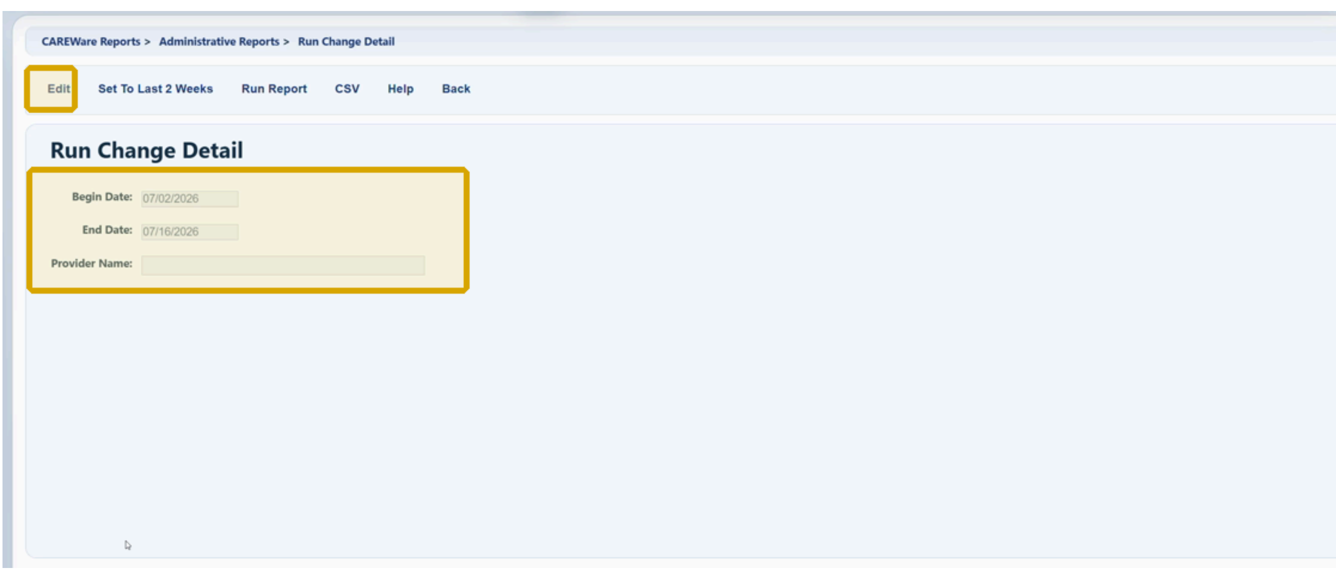
Step 2. **Open Administrative Reports.**

Step 3. **Click Search Change Details.**

Edit the report parameters

Step 4. **On the Run Change Detail page, click Edit.**

Step 5. **Enter the Begin Date and End Date for the period to review.**



Step 6. Open Provider Name and select the provider to review. The video selects Default.

Step 7. Click Save.

Tip

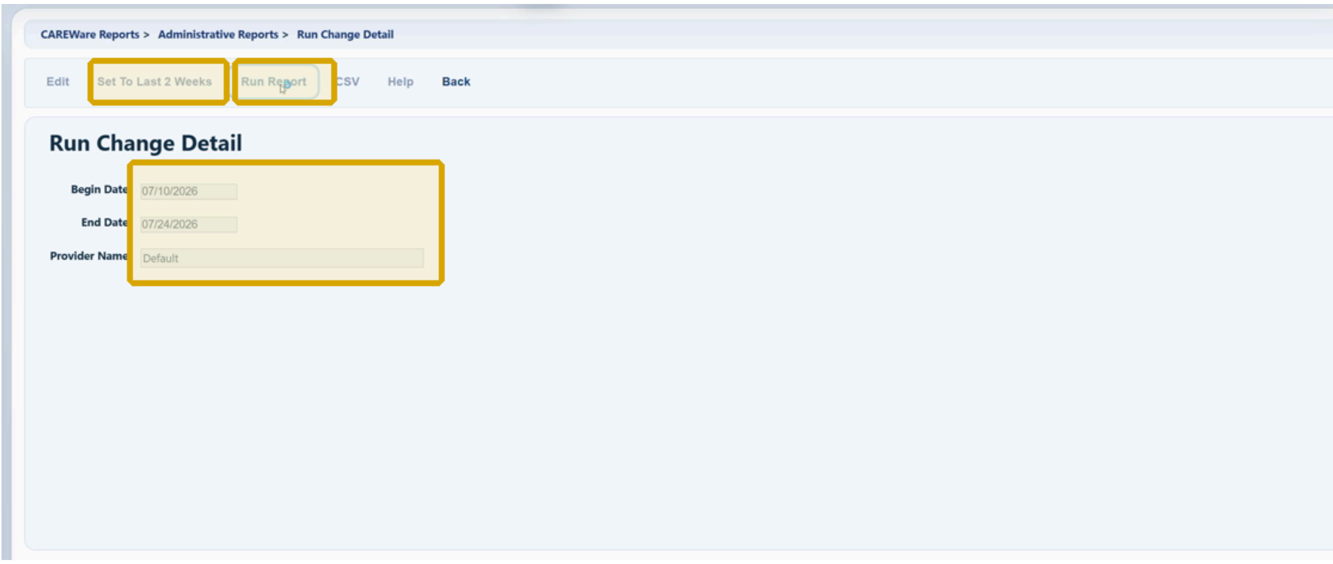
Select one provider when investigating a specific issue. Leave Provider Name blank only when you intentionally need all providers available to your Central Administration account.

Run the report

Step 8. **Click Set To Last 2 Weeks for a recent activity review, or keep the saved custom dates.**

Step 9. **Confirm the Begin Date, End Date, and Provider Name.**

Step 10. **Click Run Report.**



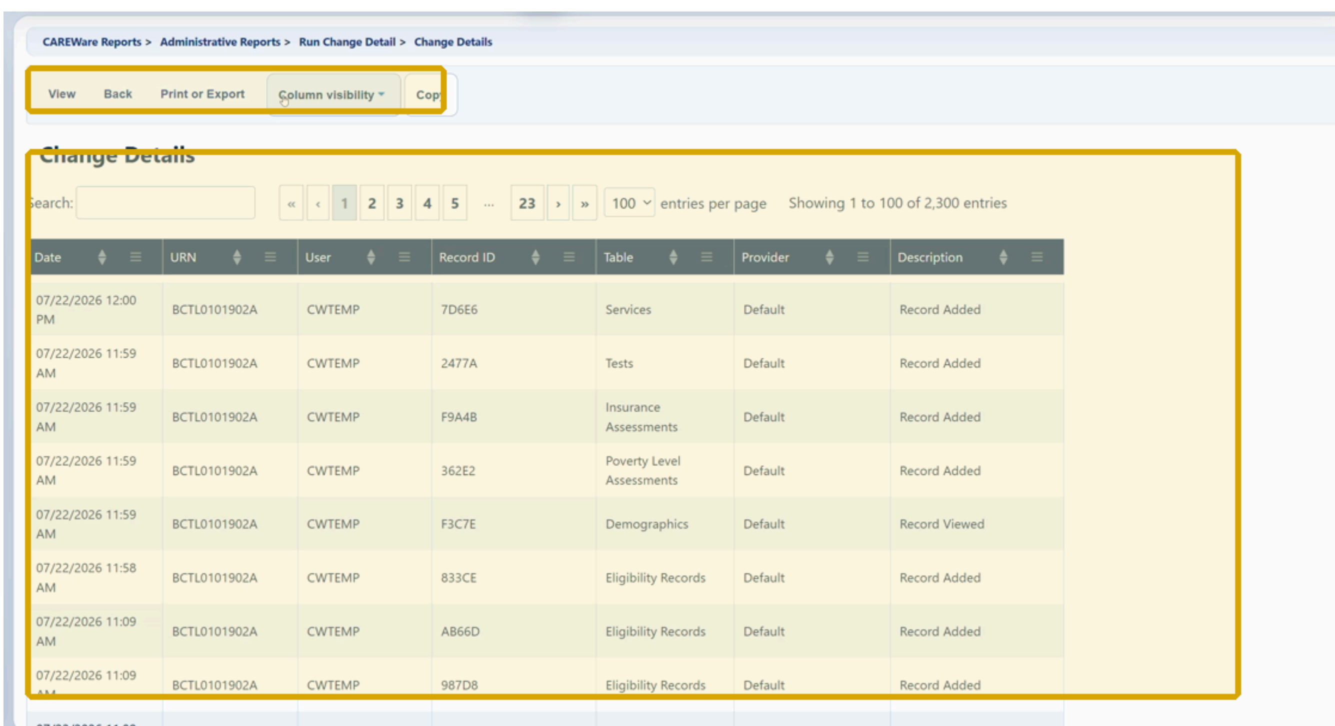
Review the change details

Step 11. **Review Date, URN, User, Record ID, Table, Provider, and Description.**

Step 12. **Use Search, sorting, page controls, entries per page, or Column visibility to narrow the displayed rows.**

Step 13. **Select a row and click View when the individual change record must be reviewed.**

Step 14. **Use Print or Export, CSV, or Copy only when an approved review file is required.**



Important
The Date value is the date and time the record was changed. It may differ from the service date, eligibility date, assessment date, or other effective date stored in the underlying record.

Search Change Details controls

Control	What it does	When to use it
Edit	Opens Begin Date, End Date, and Provider Name for editing.	Use before running the report when the saved parameters must change.
Set To Last 2 Weeks	Sets a recent two-week date range.	Use for a quick recent-activity review, then verify the displayed dates.
Run Report	Runs Search Change Details with the current saved parameters.	Use after confirming the date range and provider.
CSV	Exports the report data to a CSV file.	Use for approved spreadsheet review or reconciliation.
View	Opens the selected change record.	Select a results row before using View.
Search	Filters the displayed rows by matching visible values.	Use a user name, URN, record ID, table, provider, or description.
Print or Export	Opens options for printing or exporting the results grid.	Use for approved documentation or change-control review.
Column visibility	Shows or hides optional result columns.	Use to simplify the grid or display needed details.
Copy	Copies displayed grid data where supported.	Use for short controlled notes; verify that sensitive data is handled appropriately.
Back	Returns to the report parameter page.	Use to change the period or provider and run the report again.

Result columns

Column	What it means
Date	The date and time the change was recorded. This is not necessarily the effective date of the underlying record.
URN	The client identifier associated with the changed client record.
User	The CAREWare user account associated with the change.
Record ID	The identifier assigned to the affected record or audit entry.
Table	The CAREWare data area affected, such as Services, Tests, Insurance Assessments, Demographics, or Eligibility Records.
Provider	The provider domain where the change occurred.
Description	A summary of the recorded activity, such as Record Added or Record Viewed.

How to confirm the review is complete

- Confirm that the displayed Begin Date, End Date, and Provider Name match the issue being reviewed.
- Locate a known change and verify the expected User, Table, Provider, and Description.
- Open the selected row with View when the individual audit record must be confirmed.
- Retain an export only when required by local change-control, security, or records-retention procedures.

Helpful custom-report review tips

- Use a short date span and one provider first. Expand the scope only after confirming that the report returns the expected type of audit activity.
- Use Search to focus on a table name, user, URN, record ID, provider, or description before exporting a large result set.

Troubleshooting and common questions

Why are no records listed?

Confirm the Begin Date, End Date, and Provider Name, verify that the changes occurred during that period, click Save after editing, and run the report again.

Why does the Date not match the record’s service or assessment date?

The Date is the change timestamp. It records when the record was added, viewed, or edited, not necessarily the date stored in the underlying record.

Why are there too many results?

Reduce the date span, select one provider, and use the results Search box to filter by user, URN, table, provider, record ID, or description.

Which administrative report should I use?

Use Search Change Details for client-record change history, User Action Report for detailed user actions and affected records, User Activity Report for summarized access and frequency of activity, and Contract Change History for contract setup changes.

Related CAREWare guides and resources

Resource	How it helps
Search Change Details	Official reference for date filters, result fields, View, and export options.
User Action Report	Detailed audit trail of user actions, affected records, and edit details.
User Activity Report	Summarized logins and activity by provider, user, IP address, and hit count.
Contract Change History	Contract funding, item, subservice, price, and setup changes that may affect reports.