

Dataset Reports

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Dataset Reporting are customised reports built in CareRight.

This functionality is accesible via **Administration → Workflow → Datasets**.

If you require a customised report please contact your System Administrator, or Clintel Systems to build and implement these on your behalf.

There are a number of standard dataset reports which may be available in your CareRight instance.

Visual Query Builder

CareRight includes a visual query builder for defining datasets to form a basis for reports or workflow operations.

The screenshot displays the 'Dataset Editor' interface within the CareRight application. On the left, a sidebar menu lists navigation options: Dashboard, Administration, Workflow, Trigger Classes, Data Sets, and Lookup Tables. The main area is titled 'Dataset Editor' and features a 'Definition' panel on the left with tabs for Logic, Math, Text, Query, and Tables. The 'Tables' tab is active, showing a list of data sources: Admissions, Episodes, Providers, Locations, Invoices, Line items, Line allocations, and Line allocation logs. The central workspace contains a visual query builder diagram. It starts with 'Line items' and 'Invoices' as primary data sources. 'Line items' is joined to 'Providers' (as ProviderName) and 'Patient accounts' (as PatientName). Both 'Providers' and 'Patient accounts' have a 'create text with' block that concatenates 'family_name' and 'given_name'. The 'Invoices' source is joined to 'Guarantors' (as guarantor_name) and 'Line allocation logs' (must exist). The 'Line allocation logs' block has 'date' as DateReceived and 'amount' as Amount, with a 'Sum' aggregation. The diagram is composed of various colored blocks (purple, brown, green, orange) representing different query operations. At the bottom, there are 'Test' and 'Toggle Fullscreen' buttons.

The visual builder provides a drag and drop interface to assemble a query from the data sources within CareRight. The visual builder allows the user to focus on extracting the data they require for the report without worrying about the implementation details of the data structures in the Database. When run the Dataset automatically constructs all the joins based on a detailed inbuilt knowledge of how the tables and keys all work within the CareRight database.

FAQ - Data model

Main topic: [Data Model](#)

Financial Reports & Invoices

For any Invoicing reports the following statuses are used:

- B = Billed
- R = Raised
- S = Sent
- P = Paid
- X = Reversed

Current State

current_state is a read only public attribute that is available in dataset reporting.

Possible values of current_state include:

- AdminAdmit
 - PreAdmit
 - PendAdmit
 - Closed
 - Admitted
 - Discharged
 - AdminDisc
 - PendDisch
 - CanPreAdm
 - Cancelled
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