

Data Sets

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This article is part of the systems administration guide. You will require administration access to view the pages mentioned in this article.

Data sets are the structure of the data within your CareRight system, which enables you to easily and closely define your own reports. To create or modify a report, go to **Administration > Workflow > Data Sets**. A list of your current reports will appear with previous versions as well.

From this screen you can either start a new data set report, modify an existing data set report or copy from another report. The structure and concepts of coding your own report are based on the Blockly methodology. It would be useful to familiarize yourself by going through a free, one hour tutorial which is available on <https://studio.code.org/>

A report can be archived or delete if no longer in use.

Reporting

Dataset Reporting are customised reports built in CareRight via Administration → Workflow → Datasets. If you require a customised report please contact your System Administrator.

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

For any Invoicing reports the following statuses are used:

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

Visual Query Builder

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

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Line items

Invoices

Providers

as ProviderName
options
value
create text with
family_name
given_name

Patient accounts

Patients

as PatientName
options
value
create text with
family_name
given_name

Guarantors

name
as guarantor_name

Invoices

invoice_number

item_number

Line allocation logs

must exist
date
as DateReceived
amount
as Amount
Sum

Test
Toggle Fullscreen

1. From Administration, click Workflows > **Data Sets**.
2. In the Datasets panel, click **New** for creating a dataset.
3. Add **Name**, **Version**, and **Description** columns of the Dataset Editor.

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Dashboard / Administration / Workflow

Dataset Details

Name *

patients

Version *

1

Description

What does this dataset retrieve? [Add links to definitions](#) or specifications, note changes over time.

Dataset Editor

Definition

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Patients

family_name

When done, click **Update Dataset**.

Datasets can be Tested using the Test button at the bottom.

CareRight

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Dataset Editor

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Toggle Full...

Update patients - 1

Dataset Preview - Limited to 100 rows

SQL

```
SELECT "per"."last_name" "family_name" FROM "patients" as "pat" JOIN "people" AS "per" ON "per"."id" = "pat"."person_id" WHERE ("pat"."id" IN (SELECT DISTINCT "patients"."id" FROM "patients" INNER JOIN "patient_policies" ON "patient_policies"."patient_id" = "patients"."id" WHERE "patient_policies"."user_id" = 2)) LIMIT 100
```

family_name
Carlson
Malone
Bobbington
Bobbington
eqwe
Capperton
Roberts
Smith
Grealish
Mercy
Mark
James
Jane
James
Park
Marks
12321
Robertson
Stone
Tims
Clarkson
Read
Martin
test

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.

Rounding Decimals in the Visual Query Builder

The Visual Query Builder supports the selection of up to 4 decimal places when displaying values. To access this feature:

1. From Administration, click Workflows > **Data Sets**.
2. In the Datasets panel, click **Edit** for a dataset.
3. In the **Definition** column of the Dataset Editor, click **Math**.
4. In the **Round to** field, click the drop-down arrow and select the number of desired decimal places for the value.
5. When done, click **Update Dataset**.

