Reporting and Data Access Overview

Overview

CareRight provides a number of mechanisms to access your data, for point in time analysis, ability to customise design Data Sets; and for more advanced use cases export to external systems such as Power BI.
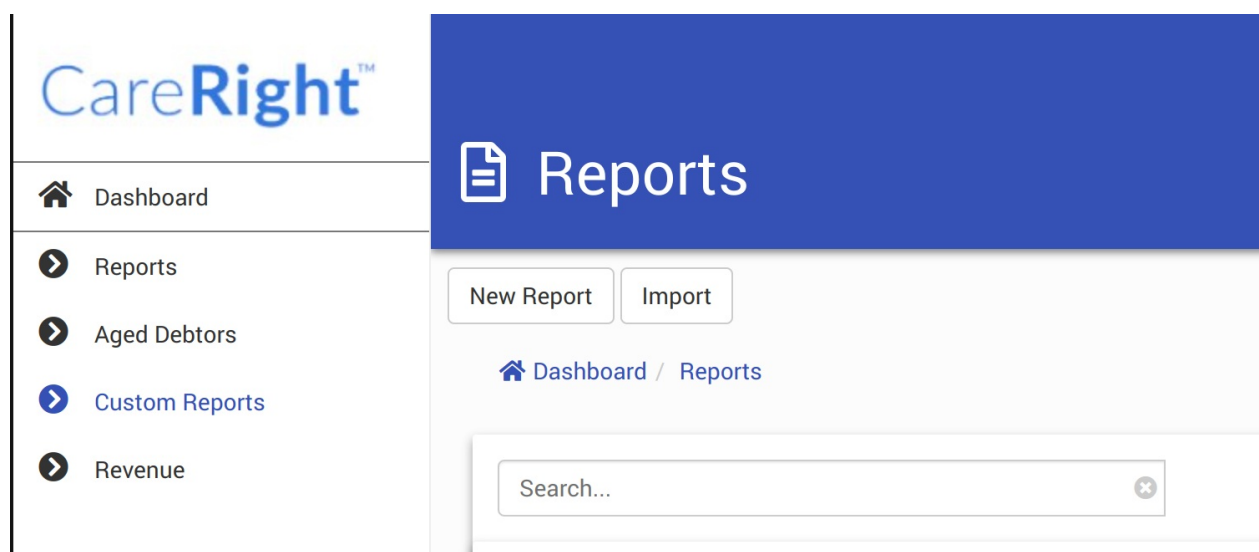
Pre-defined Reporting via the User Interface

CareRight's simplest mechanism to run reports is via the *Reports* user interface.

Required Permissions and security

When reports are run via the user interface, a menu item is available from the top level of the application. This requires users to have the *View Reports permissions.*

Users with the appropriate permissions will see either a list of available, public reports, or the ability to create a new report.

There are a number of reports already available in CareRight:

- **Available Reports** - the reports accessible to you as a user (access is provided by your System Administrator).

- **Public Reports** - reports which may have been created and made public to you as a user.

- **My Reports** - available reports you have access to, which you can save as a favorite (these can be personalized by each user.

Types of reports that users can run/save

Admission Reporting: Any admissions done by providers can be recorded in the admission reporting. Through admission report, you can observe variety of information such as date, name, location and etc.

Appointment Reporting: There are two ways of getting access to admissions reports, either though **dashboard-reports-new-appointment reports,** or you can go through appointment list by **dashboard-appointment-appointment list-print.**

Dataset Reporting: CareRight includes a visual query builder for defining datasets to form a basis for more complex reports. This is designed for use

by power users and system administrators.

Assessment (forms) Reporting: All data entered into Assessments is reportable. Creation of a new form automatically creates a new report summary

from which a whole new range of reports can be created.

Audit Reporting: Primarily for use by System administrators, the audit report allows you to report all access to objects/areas in CareRight. This

includes items such as who accessed a record, when it was accessed and any changes made.

Enquiry Reporting: All assessments and records can be linked into enquiry reports. Through enquiry reports, it is easy to view number of patient enquiries done in a specific period of time.

Midnight Census Reporting: Midnight Census is another way of multi-stay methods for hospitals to bill and claim. In the reports, beds, rooms and locations can be easily viewed and concluded.

Note Reporting: This note is referred as clinical note in CareRight system. When running the note reports, clients can view all the notes information in a period of time.

Running a Report

Generally, a report will have a number of major sections to it.

Metadata

Name, Description, and other Metadata. It is good practice for report creators to clearly document the intended purpose of the report, choose an appropriate name, and more.

Available fields

An area where you can include or exclude specific columns; apply various *grouping* and *sorting,* or change the order in which columns appear.

Each field can be set to Sort, Group, Count, Sum and Average. The relevance of each will depend on the data in that field. Available fields can be added to the report in order to represent them in different ways e.g. you may wish to group birthdays by Month, but you also want to show the actual birthday date.

Fields can be drag & dropped up or down to alter their position on the final report – click to the right of the drop-down list and drag to where you want it. Field sizes can be set in the box to the Right of the list in pixels.

Report Date / Date Range

Some reports include a Report Date Range as well as Date filters. The Report Date Range will be based on a particular date relevant to the report. (See individual reports for details)

Filters

Filters provide the mechanism to get the report to return only the information you require. You can select one or more filters and you can repeat filters several times selecting different items to include (e.g., if you want to report on Medication Incidents you may add several filters for incident type and select each Medication Incident Type so that they are all

included).

Report Logic – Provides a choice of match ALL filters or match ANY filters. In most cases you will select ALL (which is the default option) but if you are searching for information you may use ANY to cast a wider net.

Settings

Various output format criteria. Reports can also be downloaded in a number of formats: HTML, PDF, Excel Worksheet, Rich Text Form CSV format. Please enquire with your system administrator if customised reports are required.

Report Format – Allows you to select the file type for your report to display.
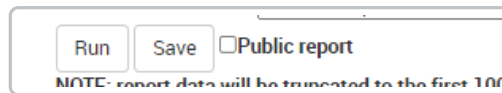
- HTML – Good for reports you only want to run to screen
- PDF – Best for printing reports
- Excel Spreadsheet – if you want to edit further
- CSV

Saving, Public Reports, Private Reports

Individual report preferences can be saved with a specific name in My Reports and run again as required without need to remember your settings each time

When creating a report, an individual user can mark a report as available for all others in the organisation.

This is achieved by selecting **Public Report** and using the **Save** functionality.
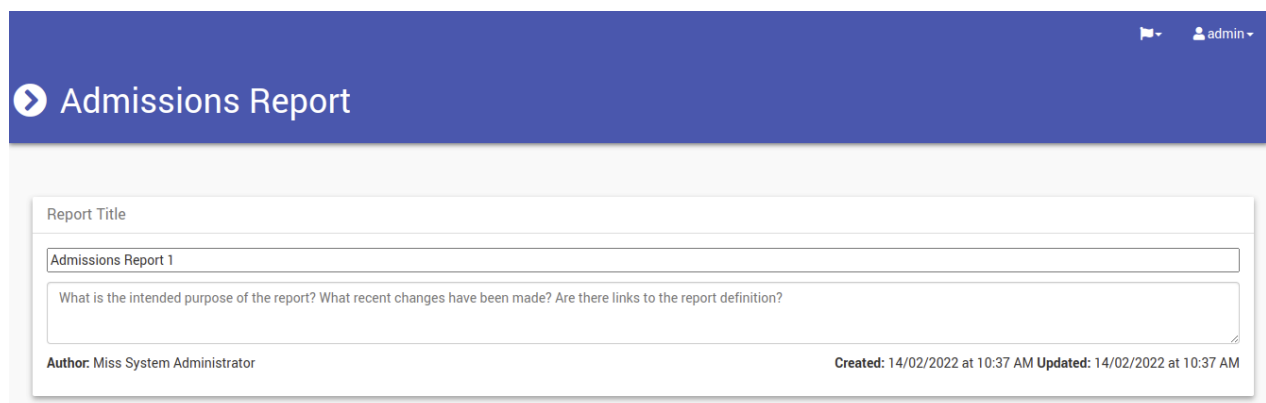

When you tick this box, the reports you are currently running will become **public**, so that everyone using CareRight will see the report in the report screen.

When you untick this box, the reports you are currently running will become **private**, which means only you can view the report in the access screen.

Best practice hint - document your reports. This will make sure others understand the context and definition of a report you have created, as well as the history.

Importing and Exporting Report Definitions

Main article: Import Reports.

Datasets & Data Model

Where the inbuilt system reports do not meet your needs, CareRight features a custom query builder, which allows drag and drop creation of pre-defined SQL queries, This is recommended for Advanced users only.

Main article: Dataset Reports.

Direct Data Access (for use with PowerBI and similar tools)

CareRight is typically deployed on a modern relational database system, such as Postgres or SQL Server.

If your organisation has an existing data warehouse or utilises tools such as Power BI, we are able to establish secure connectivity to your existing tools; allowing direct low level SQL queries to be run against both pre-defined SQL Views, and the physical schema.

Contact us to discuss your needs.