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# Report Builder: Scheduled Visit Data Report Data Guide

The Scheduled Visit Data report type is available in the Report Builder Module of the HCCRC Scheduling System. The report type provides scheduling records and information based on a desired date parameter. This guide will provide an overview of how to use the Scheduled Visit Data Report within the *Report Builder* module. This document will also cover best practices for creating reports.

For more general information on how to use the Report Builder, see the Report Builder User Guide.

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## 1. Overview

A new Report Builder Module has been developed that provides a simple, intuitive method of building different report types in the Scheduler System. The first report type within the Report Builder Module is the Scheduled Visit Data Report. This data report allows users to retrieve scheduled visit information comprised of user-selected *records* and *fields* (See the following section “Datasheet Structure”). Users can export this information into a datasheet document that can be opened in Excel.

In Section I, users will review:

- Datasheet Structure and Organization
- Data Level Hierarchies
- Field Categories in the Scheduler System

## 2. Datasheet Structure and Terminology

### *Introduction*

Before demonstrating how to build a Scheduled Visit Report, we will review some dataset terminology to help understand how fields and/or combination of fields selected relate to the information displayed in the datasheet of your report. If you feel you have a good understanding of the data structure of the Scheduled Visit Report, you can go ahead and move to Section 2 “Scheduled Visit Report Navigation and Functionality”.

### *Data Structure*

The Scheduled Visit Report presents visit information in an organized, hierarchal data structure. When a visit is scheduled, the Scheduler System assigns a unique visit record identifier called a *Scheduled Visit ID* to the visit. The *Scheduled Visit ID* is the single reference that links different attributes, or in our case, visit information fields associated with the visit.

Each visit record and its corresponding *Scheduled Visit ID* can display a structured data hierarchy containing levels of information related to the scheduled visit. Moving forward, we will define these data levels as the following:

- *Visit Level*
- *Resource Level*
- *Resource Activity Level*

Each data level provides more detailed information to its linked scheduled visit than the level above it.

### 3. Visit Level Data

*Visit Level* data is the most general level of scheduled visit information. **Figure 1.1** is an example of a datasheet export with *Visit Level* information. The example displays a scheduled visit with *Scheduled Visit ID*: 10, containing the following information:

- Study Information (Local ID)
- Visit Information (Visit Name, Scheduled Start Time, Scheduled End Time)
- Subject Information (Subject Last Name)

**Figure 1.1. Visit Level Datasheet Export**

		Columns A-F					
		A	B	C	D	E	F
Rows 1-2	1	Scheduled Visit ID	Local ID	Visit Name	Visit Start Time	Visit End Time	Subject Last Name
	2	10	Local ID 1	Visit 1	12/1/14 8:00	12/1/14 14:15	Appleseed

**Figure 1.1.** Example of Visit Information Fields Linked to a Scheduled Visit ID

Each column (A-F) represents a *field* containing user-selected attributes. Row 2 represents a single *record* of a scheduled visit. Each cell, or intersections between records and fields, contains *values* for each *field* related to the scheduled visit *record*. The first row (Row 1) of a datasheet will always contain the names of the selected *fields*.

*Visit Level* fields will always have a one-to-one relationship to its linked *Scheduled Visit ID*. Below in **Figure 1.2**, are all categories and their respective fields that will provide *Visit Level* information in the Scheduled Visit Data Report. We will review the process to create *Visit Level* data in Section 2 “Scheduled Visit Report Navigation and Functionality”. To review field definitions, please refer to Section 4 “Definition of Reporting Fields”.

**Figure 1.2. Visit Level Categories and Fields**

Study Information		Visit Information		Template Resource Information	
Catalyst ID	Local ID	Active	Sub-Location	Billable?	Resource End Time
Clinical Trial	Most Recent Scheduled Visit Date	Approved	Visit Template Billable?	Flexible?	Resource Name
CRC Category	New Drug	Does part of the visit occur at Non-CRC?	Visit Template Comment	Float End Time	Resource Start Time
CRC Funded	Pediatric	Does part of the visit occur Off Institution?	Visit Template Created Date	Float Start Time	Resource Sub-Location
Device Exemption	Protocol Number	Does this involve Research Pharmacy?	Visit Template Duration	Floatable?	Template Resource ID
Expected End Date	Short Title	In Relative Time?	Visit Template ID	Group ID	Template Resource Most Recent Update
Expected Start Date	SPID	Nursing Level	Visit Template Most Recent Update	Resource Duration	Uses Standard Alternate?
First Scheduled Visit Date	Study Abstract	Nutrition Level	Visit Template Name		
Industry Initiated	Study ID	Processing Level	Visit Template Visit Type		
Institution	Study Most Recent Update	Setup Level			
IRB	Study Name				
IRB Approval Date	Study Status				
IRB Expiration Date	Total Inpatient Visits				
IRB Institution	Total Outpatient Visits				
IRB Renewal Date	Total Subjects				

Study Staff	Template Resource Activities
Principal Investigator	Template Resource Activity
Responsible Physician	Template Resource Activity Comment
Second Responsible Physician	Template Resource Activity ID
First Scheduling Contact	Template Resource Activity Quantity
Second Scheduling Contact	
Third Scheduling Contact	
Protocol Nurse	
Associate Protocol Nurse	
Protocol Nutritionist	
Associate Protocol Nutritionist	

Study Funding Source	Fields
Funding Source 1	Select All, Grant ID
Funding Source 2	Centers And Institutions, Project End Date
Funding Source 3	Cost Center, Project Start Date
Funding Source 4	Funding Source, Total Direct Award
	Funding Source Comment, Total Indirect Award
	Funding Source ID

Sorting  
Sort 1: choose

**Figure 1.2. Visit Level Fields Categories (Highlighted in Dark Grey) and their respective fields. Please note for**

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Field Categories: Study Funding Source and Study Staff, the fields for each Funding Source or Study Staff are in the gold-outlined boxes, respectively.

#### 4. Resource Level Data

*Resource Level* data provides additional *records* in a scheduled visit datasheet by adding resource information. **Figure 1.3** is an example of a datasheet export with *Resource Level* information. The example displays the same scheduled visit (*Scheduled Visit ID*: 10) with the following fields of information:

- Study Information (Local ID)
- Visit Information (Visit Name, Scheduled Start Time, Scheduled End Time)
- Subject Information (Subject Last Name)
- Resource Information (Scheduled Resource ID, Resource Name, Resource Start Time, Resource End Time)

**Figure 1.3. Resource Level Datasheet Export**

	A	B	C	D	E	F	G	H	I	J
1	Scheduled Visit ID	Study Local ID	Visit Name	Visit Start Time	Visit End Time	Subject Last Name	Scheduled Resource ID	Resource Name	Resource Start Time	Resource End Time
2	10	Local ID 1	Visit 1	12/1/14 8:00	12/1/14 14:15	Appleseed	100	Room 1	12/1/14 8:00	12/1/14 14:15
3	10	Local ID 1	Visit 1	12/1/14 8:00	12/1/14 14:15	Appleseed	101	Nurse	12/1/14 8:30	12/1/14 14:15
4	10	Local ID 1	Visit 1	12/1/14 8:00	12/1/14 14:15	Appleseed	102	Nurse Practitioner	12/1/14 10:00	12/1/14 10:45
5	10	Local ID 1	Visit 1	12/1/14 8:00	12/1/14 14:15	Appleseed	103	Tech, Lab	12/1/14 11:45	12/1/14 13:00
6	10	Local ID 1	Visit 1	12/1/14 8:00	12/1/14 14:15	Appleseed	104	Meal	12/1/14 13:00	12/1/14 13:15

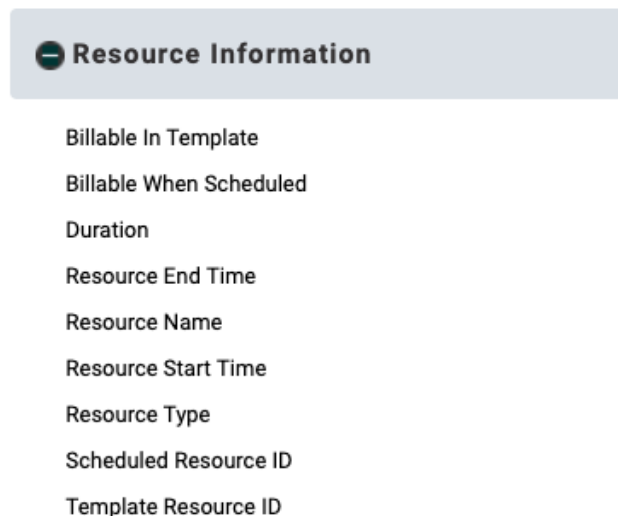
**Figure 1.3.** Example of Resource Information Fields (Column G-J) Linked to a Scheduled Visit ID

*Resource Level* fields (ex. Scheduled Resource ID, Resource Name) follow a one-to-many relationship to its linked *Scheduled Visit ID*. In other words, for every one unique scheduled visit record, there will always be one or more unique scheduled resource record(s). The *Scheduled Resource ID* (Column G) is a unique resource record identifier that will always be linked to its associated *Scheduled Visit ID*. This will be the standard hierarchy when creating *Resource Level* data.

This is also reflective in the datasheet export. In **Figure 1.3**, Columns G-J are the newly added *Resource Level* fields. Note how the datasheet went from an export containing one record of information (**Figure 1.1**) at the *Visit Level*, to an export containing five records of information (**Figure 1.3**) at the *Resource Level*. The datasheet records reflect the number of unique scheduled resources linked to its associated scheduled visit. Also note that columns A-F (*Visit Level* fields) contain repetitive values of information because *Resource Level* records associated with the same scheduled visit will always contain the same *values* for their *Visit Level* fields.

The chart in **Figure 1.4** displays the category and fields that will provide *Resource Level* information in the Scheduled Visit Data Report. We will review the process to create *Resource Level* data in Section 2 “Scheduled Visit Report Navigation and Functionality”. To review field definitions pertaining to *Resource Level* fields, please refer to Section 4 “Definition of Reporting Fields”.

**Figure 1.4. Resource Level Fields**



**Figure 1.4.** Resource Level Category (Highlighted in the Dark Gray box) and its fields.

## 5. Resource Activity Level Data

*Resource Activity Level* data provides the most detailed level of *records* in a scheduled visit datasheet by adding resource activity information to each scheduled resource. **Figure 1.5** is an example of a datasheet export with *Resource Activity Level* information. The example displays the same scheduled visit (*Scheduled Visit ID*: 10) with the following fields of information:

- Study Information (Local ID)

- Visit Information (Visit Name, Scheduled Start Time, Scheduled End Time)
- Subject Information (Subject Last Name)
- Resource Information (Scheduled Resource ID, Resource Name, Resource Start Time, Resource End Time)
- Resource Activity Information (Resource Activity ID, Resource Activity)

**Figure 1.5. Resource Activity Level Datasheet Export**

	A	B	C	D	E	F	G	H	I	J	K	L
1	Sched. Visit ID	Study Local ID	Visit Name	Visit Start Time	Visit End Time	Subject Last Name	Sched. Resource ID	Res. Name	Res. Start Time	Res. End Time	Res. Activity ID	Res. Activity
2	10	Local ID 1	Visit 1	12/1/14 8:00	12/1/14 14:15	Smith	100	Room 1	12/1/14 8:00	12/1/14 14:15	Null	Null
3	10	Local ID 1	Visit 1	12/1/14 8:00	12/1/14 14:15	Smith	101	Nurse	12/1/14 8:30	12/1/14 14:15	4251	Nurse Intake
4	10	Local ID 1	Visit 1	12/1/14 8:00	12/1/14 14:15	Smith	101	Nurse	12/1/14 8:30	12/1/14 14:15	4252	Blood-Draw
5	10	Local ID 1	Visit 1	12/1/14 8:00	12/1/14 14:15	Smith	101	Nurse	12/1/14 8:30	12/1/14 14:15	4253	IV Access
6	10	Local ID 1	Visit 1	12/1/14 8:00	12/1/14 14:15	Smith	101	Nurse	12/1/14 8:30	12/1/14 14:15	4254	Monitor Flush
7	10	Local ID 1	Visit 1	12/1/14 8:00	12/1/14 14:15	Smith	101	Nurse	12/1/14 8:30	12/1/14 14:15	4255	Vitals, Simple
8	10	Local ID 1	Visit 1	12/1/14 8:00	12/1/14 14:15	Smith	101	Nurse	12/1/14 8:30	12/1/14 14:15	4256	POCT
9	10	Local ID 1	Visit 1	12/1/14 8:00	12/1/14 14:15	Smith	101	Nurse	12/1/14 8:30	12/1/14 14:15	4257	Assess AE
10	10	Local ID 1	Visit 1	12/1/14 8:00	12/1/14 14:15	Smith	101	Nurse	12/1/14 8:30	12/1/14 14:15	4258	Meds, Simple
11	10	Local ID 1	Visit 1	12/1/14 8:00	12/1/14 14:15	Smith	101	Nurse	12/1/14 8:30	12/1/14 14:15	4259	Monitor 1:1
12	10	Local ID 1	Visit 1	12/1/14 8:00	12/1/14 14:15	Smith	101	Nurse	12/1/14 8:30	12/1/14 14:15	4260	Other
13	10	Local ID 1	Visit 1	12/1/14 8:00	12/1/14 14:15	Smith	102	Nurse Prac.	12/1/14 10:00	12/1/14 10:45	9235	Assess AE
14	10	Local ID 1	Visit 1	12/1/14 8:00	12/1/14 14:15	Smith	102	Nurse Prac.	12/1/14 10:00	12/1/14 10:45	9236	History, Physical
15	10	Local ID 1	Visit 1	12/1/14 8:00	12/1/14 14:15	Smith	102	Nurse Prac.	12/1/14 10:00	12/1/14 10:45	9237	Data Review
16	10	Local ID 1	Visit 1	12/1/14 8:00	12/1/14 14:15	Smith	103	Tech, Lab	12/1/14 11:45	12/1/14 13:00	62	Processing
17	10	Local ID 1	Visit 1	12/1/14 8:00	12/1/14 14:15	Smith	104	Meal	12/1/14 13:00	12/1/14 13:15	12239	Lunch

**Figure 1.5.** Example of Resource Activity Information Fields (Column K-L) Linked to Scheduled Resources Linked to a Scheduled Visit ID.

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*Resource Activity Level* fields (ex. Scheduled Resource Activity ID, Resource Activity) can follow a one-to-many relationship to a linked *Scheduled Resource ID*. In other words, for every unique scheduled resource record, there will be zero or more unique scheduled resource activity record(s). Some resource records may not have a resource activity record since resource activities aren't required for resources. The *Scheduled Resource Activity ID* (Column K) is a unique resource activity record identifier that will always be linked to its associated *Scheduled Resource ID* (Column G). This will be the standard data hierarchy when creating *Resource Activity Level* data.

The datasheet export also reflects this detailed level of information. In **Figure 1.5**, Columns K-L are the newly added *Resource Activity Level* fields. Note how the datasheet expanded in records going from five records of information (**Figure 1.3**) at the *Resource Level*, to sixteen records of information (**Figure 1.5**) at the *Resource Activity Level*. The datasheet in **Figure 5** follows the same pattern of structure as previous data levels in that the records reflect the number of unique scheduled resource activities linked to its associated scheduled resource. Resources without resource activities display “Null” values in *Resource Activity Level* fields (**Figure 1.5, Row 1, Column L**). Similar to the pattern we reviewed with *Resource Level* data, Columns G-J (*Resource Level* fields) will contain repetitive values of resource information for resource activity records associated with the same resource record.

The charts in **Figure 1.6** displays the categories and their respective fields that will produce *Resource Activity Level* information in the Scheduled Visit Data Report. We will review how to select fields to create *Resource Activity Level* data in Section 2 “Scheduled Visit Report Navigation and Functionality”. To review field definitions pertaining to *Resource Level* fields, please refer to Section 4 “Definition of Reporting Fields”.

**Figure 1.6. Resource Activity Level Categories and Fields**

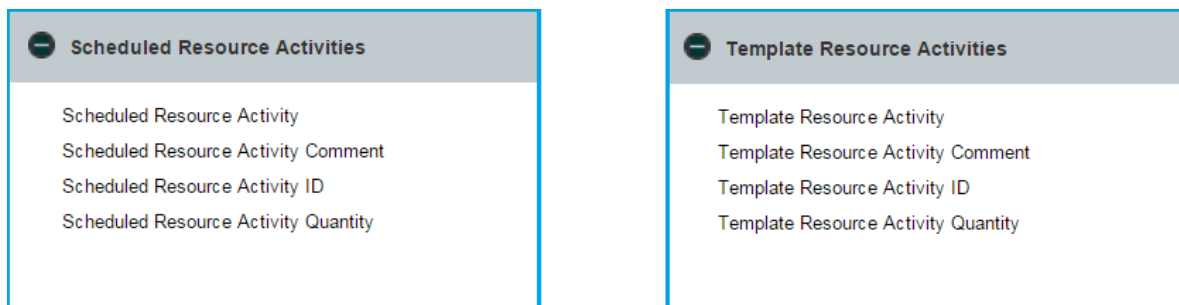


Figure 1.6. Resource Activity Level Categories (Highlighted in the Dark Gray box) and their respective

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Resource Activity Fields.

## 6. Data Level Order

One last concept is precedence between different data levels. For example, if fields are selected from all three data levels, which data level will display in the datasheet?

The rule is: records displayed will *always* be based on the more detailed data level. For clarification, data levels going from least detailed to most detailed is as follows:

*Visit Level < Resource Level < Resource Activity Level*

In order to view data at the desired data level, make sure to not select fields within a more detailed data level.

## 7. Summary

Understanding data level structure and the fields within each level, users can review scheduled visit information in multiple ways.

Users that have exported some of the standard reports in the current Reporting Module may have noticed this type of data structure. For example, the Census Report is a visit level dataset while the Daily Resource Usage is a resource level dataset with both capturing the same visit record information.

The goal of the Scheduled Visit Data report is to be the most dynamic version of these two reports; allowing users to create personalized variations of standard scheduled visit reports found in the current Reporting Module.

Understanding the organization of the data captured in the Scheduler System, we can now review how to navigate through the Scheduled Visit Data Report to select fields and create a customized dataset.