Advanced Filter: Overview

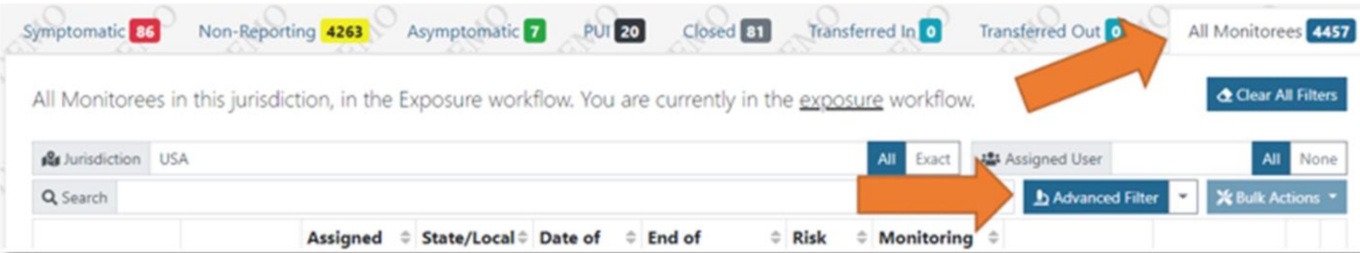
Questions? Contact sarasupport@aimsplatform.com

How to use the Advanced Filter:

This feature allows users to search across the system by multiple fields at one time. A user may set criteria for up to 5 fields for each advanced filter and save up to 10 advanced filters for reuse. All filters are applied to the **current workflow** and are in addition to any Basic Search terms and Assigned User and Jurisdiction dashboard quick filters applied.

1 Click the “Advanced Filter” button

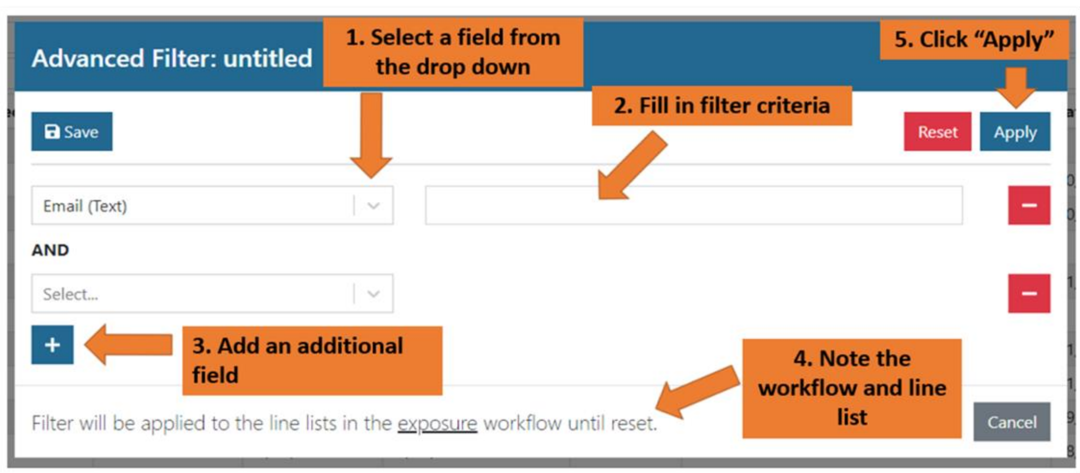
Select the desired workflow and line list and click the “Advanced Filter” button to open the filter modal. To filter by all monitorees within a workflow, select the “All Monitorees” tab.



Click the "Advanced Filter" button within the desired workflow and line list

2 Select field(s) from the drop down, set appropriate criteria, and select “Apply”

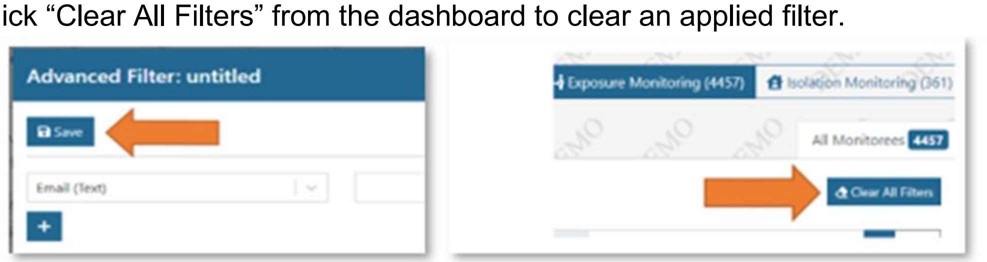
Select the desired search fields from the drop down and fill in the filter criteria as appropriate. Use the “+” button to add a filter, and the “-“ filter to remove it. To apply the filter, click “Apply’.



Select the desired fields and enter filter criteria

3 Save or clear a filter

Click “Save” to save a filter and access it from dropdown next to the “Advanced Filter” button on the dashboard. Click “Clear All Filters” from the dashboard to clear an applied filter.



Click "Save" to save search criteria and "Clear All Filters" to remove them

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Sara Alert™

Secure monitoring and reporting for public health

Quick Start Guide

Advanced Filter: Scenarios

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Use Advanced Filter to Find Records of Interest

Advanced filters are applied to the **current workflow** and are in addition to any Basic Search terms and Assigned User and Jurisdiction dashboard quick filters applied. The scenarios below are meant to illustrate how the filters can be used to find records of interest.

Scenario	Workflow	Selected Line List	Filters Applied
Find monitorees who may be eligible to end quarantine after 7 or 10 days (per 12/2/20 CDC Guidelines)	Exposure	Active Line Lists (e.g., not Closed)	1. Add "Candidate to Reduce Quarantine after 7 Days" or "Candidate to Reduce Quarantine After 10 Days" Filter 2. Select "TRUE" and click "Apply."
Find all monitorees who are being continuously exposed	Either	Active Line Lists (e.g., not Closed)	1. Add "Continuous Exposure" Filter. 2. Select "TRUE" and click "Apply."
Identify monitorees who have opted out of automated Sara Alert™ messages that are assigned to a specific user for follow-up	Either	Any	1. Add "Preferred Reporting Method" Filter. 2. Select "Opt-out" from the drop-down and click "Apply." 3. From the dashboard, select the Assigned User's number from the drop-down to filter records.
Find all monitorees who are in a specific common exposure cohort. Save the filter for future use	Either	Any	1. Add "Common Exposure Cohort Name" Filter. Enter a partial or exact match of text saved in the "Member of a common exposure cohort" field. 2. Click "Save" and add a filter name. Click "Apply."
Find monitorees who were enrolled prior to the current date and have an unknown preferred reporting method	Either	Active Line Lists (e.g., not Closed)	1. Add "Enrolled" Filter. In the operator drop-down, select "before". Select the current date. 2. Press the plus (+) button to add another filter. Add "Preferred Reporting Method" and select "Unknown". Click "Apply."
Find and close all monitorees on the non-reporting line list who have not submitted a Report in the past 2 days and where it is at least 14 days past their Last Date of Exposure (e.g., lost to follow-up)	Exposure	Non-Reporting	1. Add "Last Date of Exposure" Filter. In the operator drop-down, select "before". Select the date 14 days before the current date. 2. Press the plus (+) button to add another filter. 3. Add "Latest Report" filter. In the operator drop down, select "before". Enter the date 2 days before the current date and click "Apply." 4. From the dashboard, "select all" records on the page. 5. Click "Bulk Actions" and select "Close Records."
Find and close all cases on the non-reporting line list who have not submitted a Report in the past 3 days and where it is at least 10 days past their Symptom Onset date	Isolation	Non-Reporting	1. Add "Symptom Onset Date" Filter. In the operator drop-down, select "before". Select the date 10 days before the current date. 2. Press the plus (+) button to add another filter. 3. Add "Latest Report" filter. In the operator drop down, select "before". Enter the date 3 days before the current date and click "Apply." 4. From the dashboard, "select all" records on the page. Click "Bulk Actions" and select "Close Records."
Find all Spanish speaking cases that require interpretation when public health follows-up with monitoree	Either	Symptomatic, Non-Reporting, Records Requiring Review	1. Add "Primary Language" Filter. Select "Spanish" from the dropdown. 2. Press the plus (+) button to add another filter. 3. Add "Requires Interpretation", select "TRUE" and click "Apply"
Find all monitorees in the same workflow who have the same primary telephone number	Either	All Monitorees (Exposure) or All Cases (Isolation)	1. Add "Telephone Number (Exact Match)" filter. 2. Enter 10-digit phone number into text box. Click "Apply"
Find monitorees within the same zip code	Either	Any	1. Add "Address (within USA)" filter. 2. Enter the desired zip code and click "Apply."
Find monitorees who are either self-reporters or Heads of Households (e.g., *may* be eligible to receive notifications from Sara Alert™)	Either	Active Line Lists (e.g., not Closed)	1. Add "Daily Reporters" filter. 2. Select "TRUE" and click "Apply."
Find monitorees if only an age and phone number are known	Either	Any	1. Enter approximate year of birth in the dashboard search field (e.g., 199 to search for anyone born in the 1990's). 2. Add "Telephone Number (Contains)" filter. Enter a partial phone number (e.g., area code). Click "Apply."
Find monitorees who have at least 3 unsuccessful manual contact attempts.	Either	Any	1. Add "Manual Contact Attempts" filter. 2. Select "unsuccessful" then "greater than" from the drop down and type "3" in the number field. Click "Apply." 3. Open record and filter history by "Contact Attempt" for details

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