Sara Alert™
Secure monitoring and reporting for public health

Advanced Filter: Overview

Quick Start Guide (Page 1)   Questions? Contact sarasupport@aimsplatform.com
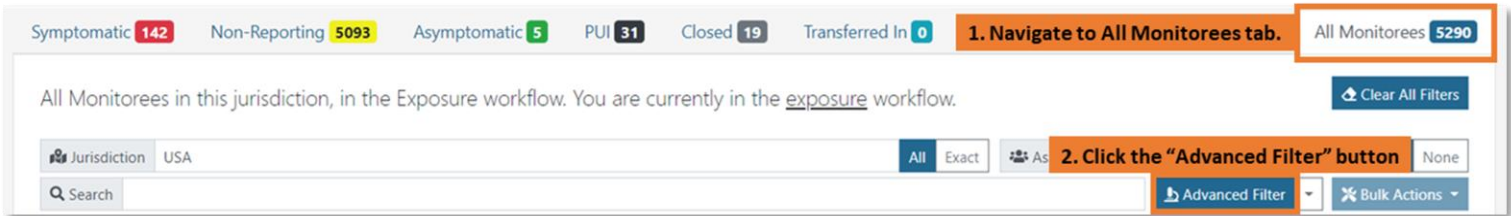
How to use the Advanced Filter:

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 150 advanced filters for reuse. All filters are in addition to any Basic Search terms and Assigned User and Jurisdiction dashboard quick filters applied.
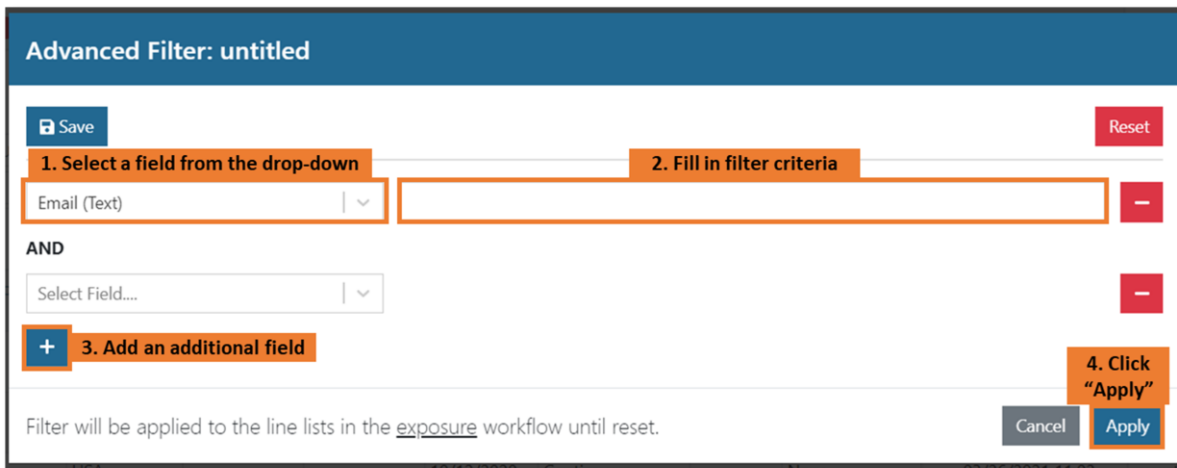
1 **Click the "Advanced Filter" button**

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

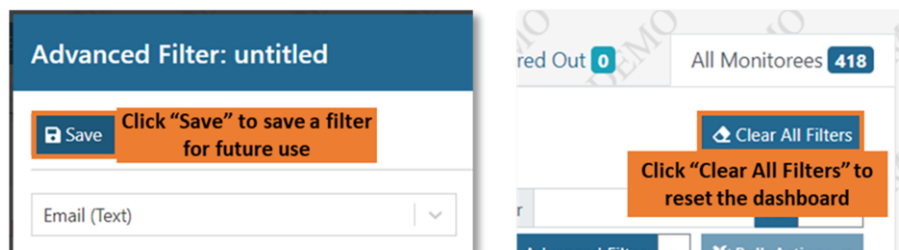**2** **Select field(s) from the drop down, set appropriate criteria, and select "Apply"**

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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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 for COVID after 7 or 10 days (per 12/2/20 COVID 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.
Filter for all monitorees with close contact with a specific known case documented as an exposure risk factor	Either	Any	1. Add "Close Contact with a Known Case ID (Text)" Filter. Enter a partial or exact match of text saved in the "Close Contact with a Known Case" field. If appropriate, separate multiple search values with commas. 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 (Date)" 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 (e.g., lost to follow-up) and are past their monitoring period	Exposure	Non-Reporting	1. Add "Last Date of Exposure (Relative Date)" Filter. Select "custom" from the drop-down, select "more than", specify the length of the monitoring period, and select "in the past." For COVID, enter 14 days. 2. Press the plus (+) button to add another filter. 3. Add "Latest Report (Relative Date)" filter. Select "custom" from the drop-down and select "more than" operator and specify 2 day(s) "in the past." 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 are past their isolation period (Symptom Onset date + isolation length)	Isolation	Non-Reporting	1. Add "Symptom Onset Date (Relative Date)" Filter. Select "custom" from the drop-down, select "more than", specify the length of the isolation period, and select "in the past." For COVID, enter 10 days. 2. Press the plus (+) button to add another filter. 3. Add "Latest Report (Relative Date)" filter. Select "custom" from the drop-down, specify more than 3 days in the past, and click "Apply." 4. From the dashboard, select all records on the page. 5. 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. Add "Age" filter, select "equal to", input age, and click the "+." 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 the record and filter history by "Contact Attempt" for details.

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