

Advanced Filter: Overview

Questions? Contact sarasupport@aimsplatform.com

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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.



Click the "Advanced Filter" button

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

+ Enroll New Monitoree 🛃 E	ixport - 🏩 Import -		🚧 Exposure Moni	toring (589)	Lisolation Monitoring (328)	Global Dashboard (917)
Symptomatic 49 Non-Repor	rting 98 Asymptomatic 9	PUI 15 Closed 41	8 Transferred In 0	Transferred	1. Navigate to All Monitorees tab	All Monitorees 589
Monitorees currently report	ting no symptoms, who hav	ve reported during the l	ast day. You are curre	ntly in the <u>ex</u>	<u>kposure</u>	Clear All Filters
workflow. 🚱					2. Click the "Ad Filter" but	ton
Q Search			A	Exact	Assigne Advanced Fi	All None
C Search					Advanced Fi	iter K buik Actions

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



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 blue "+" button to add a filter, and the red "-" filter to remove it. To apply the filter, click "Apply'.

Advanced Filter: untitled		
 Save Select a field from the drop-down 	2. Fill in filter criteria	Reset
Email (Text) 🛛 🗸 🗸		-
AND		
Select Field		-
+ 3. Add an additional field		4. Click "Apply"
Filter will be applied to the line lists in the	<u>exposure</u> workflow until reset.	Cancel Apply

Select the desired fields and enter filter criteria



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For "Combination" search fields (e.g., Lab Result), use the gray "+" button to add additional search criteria. The filter will look for records containing data elements (e.g., lab results) that match all specified criteria. For example, the search below would find records containing at least one lab result with a positive result and PCR test type.

Advanced Filter: untitled	
D Save	Reset
Lab Result Combination) v result v positive v +	0 🗖
Filter will be applied to all line lists in the current dashboard until reset.	Cancel Apply

Use the gray "+" button to add additional search criteria for "Combination" filters

For "Multi-select" search fields (e.g., Assigned User), you can select multiple search values from the drop-down menu. Records matching any of the selected values will be shown.

Advanced Filter: untitled	
■ Save	Reset
Assigned User (Multi-select) 20 × 30 × 13 × 34 ×	× ~ 😧 🗕
Filter will be applied to all line lists in the current dashboard until reset.	Cancel Apply

Multiple values can be inputted when using a "Multi-select" filter

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.

Advanced Filter: untitled	red Out 0 All Monitorees 418
Save Click "Save" to save a filter for future use	Clear All Filters
Email (Text)	reset the dashboard

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



Advanced Filter: Scenarios

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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)	 Add "Candidate to Reduce Quarantine after 7 Days" or "Candidate to Reduce Quarantine After 10 Days" Filter Select "TRUE" and click "Apply."
Find all monitorees who are being continuously exposed	Either	Active Line Lists	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	 Add "Preferred Reporting Method" Filter. Select "Opt-out" from the drop-down and click "Apply." 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	 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. Click "Save" and add a filter name. Click "Apply."
Find monitorees in the Isolation workflow who are ineligible to reach the Records Requiring Review line list	Isolation	Non-Reporting, Reporting, All Cases	1. Add "Ineligible for any recovery definition (Boolean)" 2. Select "True", and click "Apply"
Find and close all Exposure 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	 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. Press the plus (+) button to add another filter. 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." From the dashboard, "select all" records on the page. 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	 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. Press the plus (+) button to add another filter. Add "Latest Report (Relative Date)" filter. Select "custom" from the drop-down, specify more than 3 days in the past, and click "Apply." 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	 Add "Primary Language" Filter. Select "Spanish" from the dropdown. Press the plus (+) button to add another filter. Add "Requires Interpretation", select "TRUE" and click "Apply"
Find all monitoree records that contain an unenrolled contact in their Close Contact table	Either	All Monitorees (Global)	1. Add "Unenrolled Close Contact" and select "True" 2. Click "Apply"
Find monitorees that have a specific Flag for Follow-up Reason	Either	Any	1. Add "Flagged for Follow-up" and select your reason of interest 2. Click "Apply"
Find monitorees who are either self- reporters or Heads of Households (e.g., <i>may</i> 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 all monitorees assigned to a range of Assigned User values	Either	Any	1. Add "Assigned User" filter, select all Assigned User values of interest from the drop-down. Click "Apply"
Find all Exposure monitorees who have a blank "Last Date of Exposure"	Exposure	All Monitorees (Exposure Monitoring)	 Add "Last Date of Exposure (Date)" filter. The "(Relative Date)" filter does not support this scenario. Select the blank operator from the drop-down. Click "Apply."