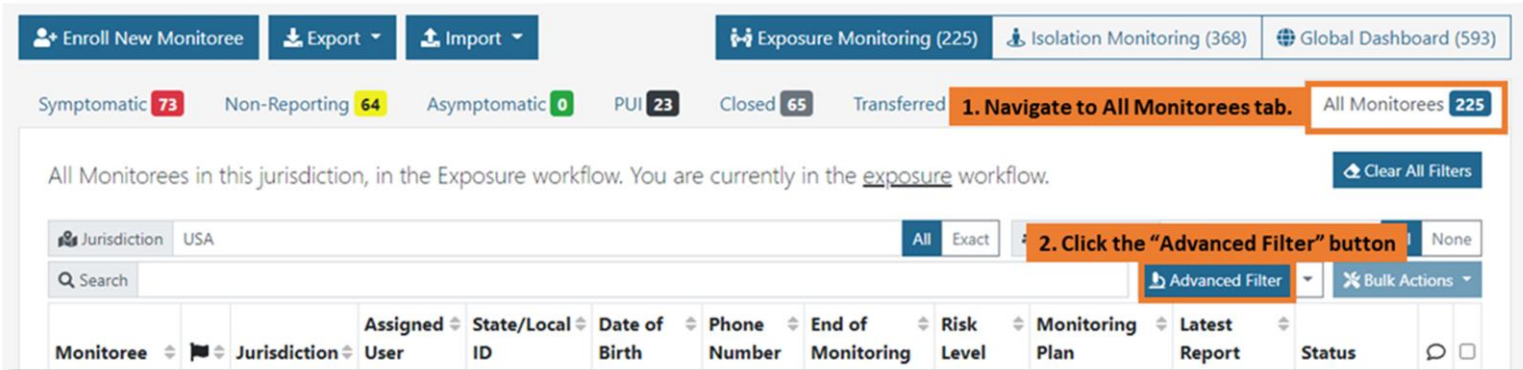## How to use the Advanced Filter:

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.

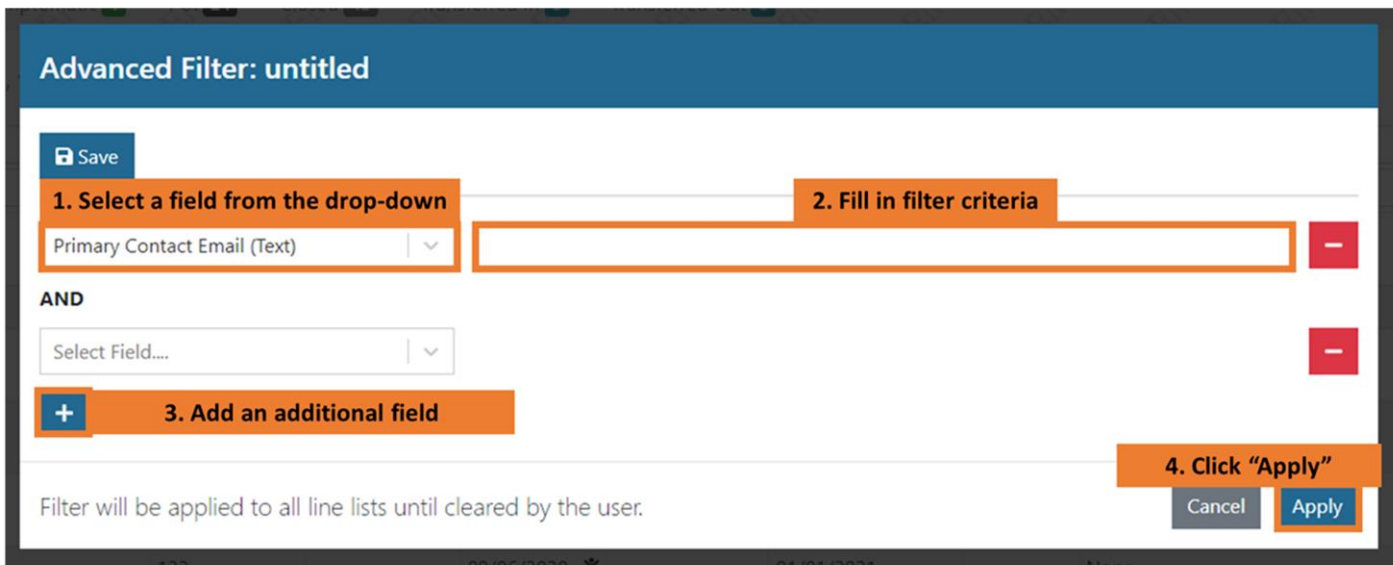**1** | **Click the "Advanced Filter" button**

Select the desired 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.

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

Select the desired fields and enter filter criteria

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Advanced Filter: Overview

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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.
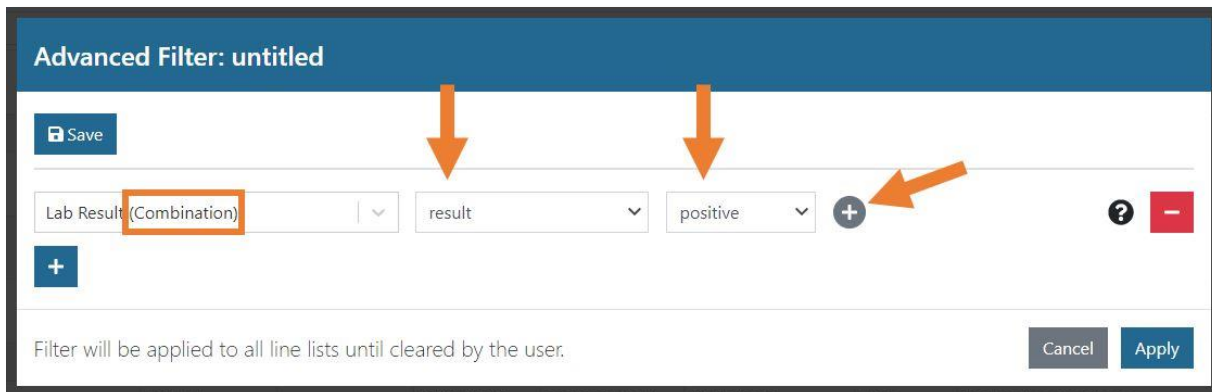
Use the gray "+" button to add additional search criteria for "Combination" filters
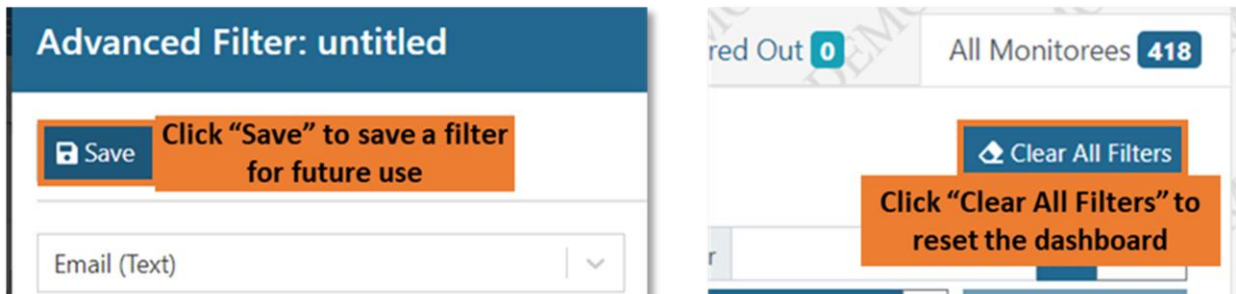
For "Multi-select" search fields (e.g., Assigned User), you can select multiple search values from the drop-down menu. Records matching any of the selected values will be shown.
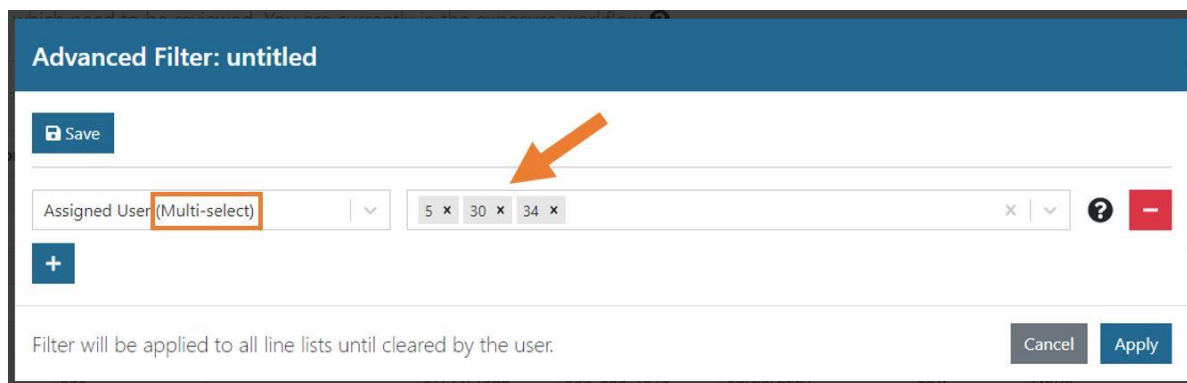
Multiple values can be inputted when using a "Multi-select" filter

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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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 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 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	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 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 with a Primary Contact Relationship of "Parent/Guardian"	Either	Any	1. Add "Primary Contact Relationship" and select "Parent/Guardian" 2. 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 all monitorees assigned to a range of Common Exposure Cohort types and locations	Either	Any	1. Add "Common Exposure Cohort", add "cohort type", and select all Cohort Types of interest. 2. Press the gray plus (+) to add a combination filter. 3. Select "cohort location", select all cohort locations of interest, and "Click "Apply"
Find all Exposure monitorees who have a blank "Last Date of Exposure"	Exposure	All Monitorees (Exposure Monitoring)	1. Add "Last Date of Exposure (Date)" filter. The "(Relative Date)" filter does not support this scenario. 2. Select the blank operator from the drop-down. Click "Apply."

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