

## EMTrack™ Quick Reference Guide

# Filter Management

## Overview

EMTrack allows you to create and manage filters that identify specific patients or groups of patients. These filters can be used to find certain patients, and they can be added to your dashboard, as gadgets, to provide information about certain types of patients at a glance. Combining filter criteria appropriately is essential for building useful gadgets and dashboards.

## Search Terms and Results

When building a filter, you can specify a single search term, a set of terms, or multiple sets of criteria. In a set of terms, the more criteria you specify, the narrower your search results.

Use multiple sets to build an “OR” operation. The resulting list includes the records that meet the criteria specified in one of the sets you define. For example, you would build two search sets to create a filter showing all patients at your location or en route to it.

By default, your search results include several columns. You can add to or change these columns as appropriate for the filter. Columns define the patient data that appears in a **Client List** gadget; therefore, filters you intend to apply to this type of gadget must include at least one column.

## Owning and Sharing

Division administrators can share owning rights with their division, which gives other administrators the right to edit the filter. To share those rights, select the division as **Owner**.

Depending on your role and rights, you may be able to share the filters you create with other users. Also depending on your role, you may be able to share based on a role, division type, or specific division.

When you share a filter, the other users can use it in their dashboards. Those users cannot reconfigure or otherwise edit that filter. However, they can copy the filter to create a new one.

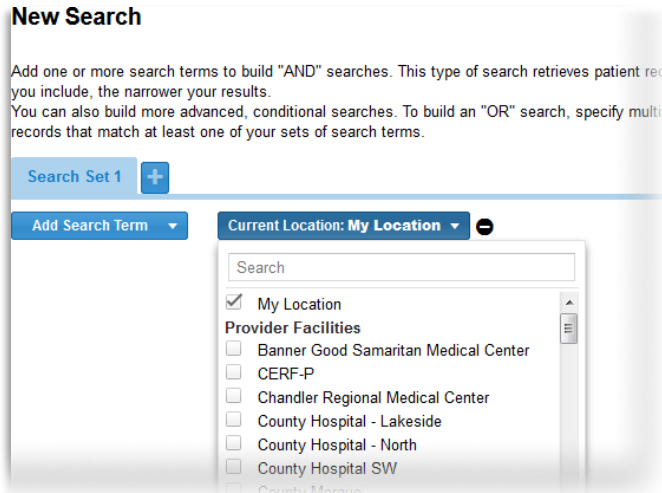
## Options

You can create a new filter by starting from scratch or by copying an existing one. You can also build a filter or edit it from within a client gadget. Refer to EMTrack’s Help Center for details.

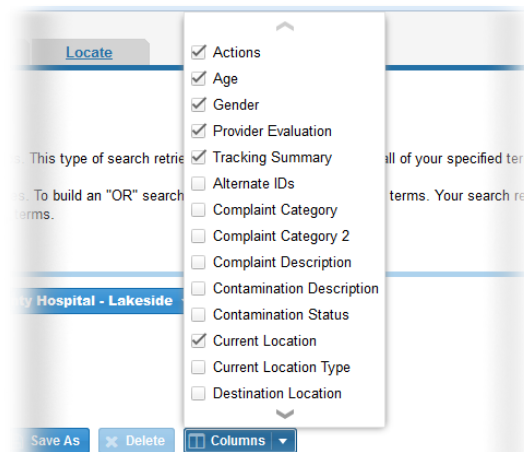
### To Build a New Filter

1. From any page, click the **Filters** tab.
2. If a filter is currently visible in the tab, click **New**.

3. Add search criteria as follows:
  - a. Click **Add Search Term**.
  - b. Select the term. It appears in the page.
  - c. Click the term and select the appropriate values or enter data.



- d. Repeat steps a – c for each term you want to add.
4. If appropriate, add another set of criteria as follows:
  - a. Click the search set plus icon.
  - b. Click **Add Search Term**.
  - c. Select the term. It appears in the page.
  - d. Click the term and select the appropriate values or enter data.



- e. Repeat steps a – d for each term you want to add.
5. To add another search set, repeat step 4.
6. Click the **Columns** button and select the check box for each column you want to include.
7. Click **Search**.

8. In the search results, click and drag columns to set the order you want.

**New Search**

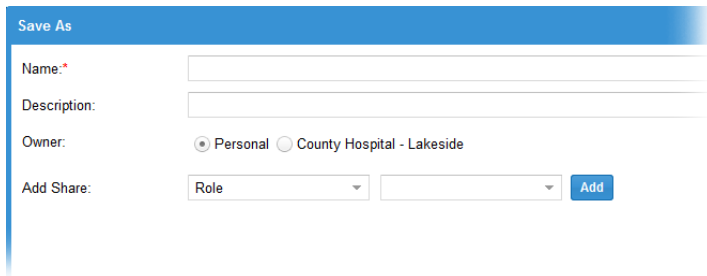
Views ▾ Actions ▾

<input type="checkbox"/>	Age	Gender	Current Location	Provider Evaluation	Tracking Summary
<input type="checkbox"/>	20 - 39 YR	Female	County Hospital - Lakeside	● Black - Environmental dis...	At County Hospital - Lakeside
<input type="checkbox"/>	13 - 19 YR	Female	County Hospital - Lakeside	● Yellow	At County Hospital - Lakeside
<input type="checkbox"/>	40 - 59 YR	Male	County Hospital - Lakeside	● Unspecified	At County Hospital - Lakeside
<input type="checkbox"/>		--	County Hospital - Lakeside	● Unspecified	At County Hospital - Lakeside
<input type="checkbox"/>		--	County Hospital - Lakeside	● Red	At County Hospital - Lakeside
<input type="checkbox"/>	20 - 39 YR	--	County Hospital - Lakeside	● Yellow	At County Hospital - Lakeside
<input type="checkbox"/>		Female	County Hospital - Lakeside	● Unspecified	At County Hospital - Lakeside

9. Click the header of the column by which you want to sort the results.

10. Click **Save As** and do one or more of the following, as appropriate:

a. In **Name**, enter the filter's name.



**Save As**

Name:

Description:

Owner:  Personal  County Hospital - Lakeside

Add Share:  Role

b. If appropriate, in **Description**, enter its description.

c. In **Owner**, select **Personal** or your division/region.

d. To share this filter, click the **Add Share** drop-down list and do one of the following:

- Select **Role**, then select a role.
- Select **Division Type**, the type of division, and then a role.
- Select **Division**, a specific provider, and then a role.

e. Click **Add**.

f. Repeat steps a – e to share the filter with another role, type, or division.

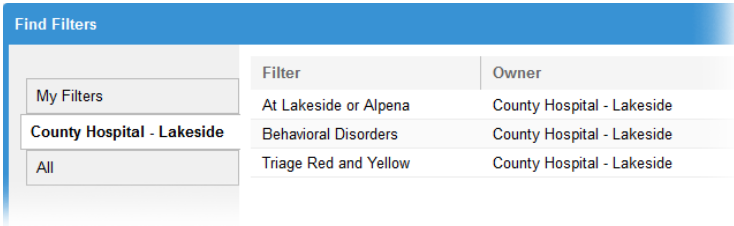
11. Click **Save**.

## To Build a Filter from a Copied Filter

1. From any page, click the **Filters** tab.

2. Click **Find Filters**.

3. In the window that opens, click the appropriate tab: **My Filters**, division or region, or **All**.



4. Click the filter you want to copy. The window closes and
5. the **Filters** tab shows the existing search terms for the filter you selected.
6. Add to or change search criteria and complete the process by following the To Build a New Filter procedure, starting at step 3.

## To Edit a Filter

1. All filters that are available to you appear in the *Find Filters* window, including the filters you created and those that administrators shared with you. You can edit your own filters and, depending on your role, may be allowed to edit division filters.
2. From any page, click the **Filters** tab.
3. Click **Find Filters**.
4. In the window that opens, click the appropriate tab: **My Filters**, division or region, or **All**.
5. Click the filter you want to edit. The window closes and the **Filters** tab shows the existing search terms for the filter you selected.
6. If appropriate, change search criteria by removing a:
  - Data value from a term by opening the search team and clearing its check box.



- Search term by clicking the remove icon to its right.
  - Set of search terms by clicking the remove icon in the set's tab.
7. Complete the process by following the To Build a New Filter procedure, starting at step 3.

*Juvare envisions a future where communities are resilient in the face of danger. Offering precise, vigilant, and connected solutions, Juvare fosters networks of mutual assistance to help organizations bounce forward. For more information about Juvare solutions, contact the Juvare Support Center, [support@juvare.com](mailto:support@juvare.com) or 877-771-0911.*