INTRODUCTION

Data filters serve several purposes in Clinical Conductor. One of the main functions of the data filter is to narrow down the patient list to a specific group of patients matching various criteria. These patients can then be added to a new call list, pre-screened for a study, or handled in various different ways.

CREATING A DATA FILTER

To begin the filter creation process, start by clicking Data Filters in the "Patient Database" menu under the "Patients" tab:

This will open the “Filter List”, which is a list of already existing filters. To create a new filter, click on Add New Filter at the top right of the “Filter List” screen:

1. Enter a name for this new filter.
2. Click Apply to activate rest of screen.

Note: Give the filter a name which will act as a reminder for what the filter is for, e.g. “Men aged between 30 and 35.”

3. Fill out “Patient Demographics” by entering the requested values for each field. Optionally, enter a numeric order in the “Order” fields to specify the order in which the items will appear on the filter.

Note: “Race” and “Marital Status” are multi-select options. To select various entries for those fields, hold the CTRL key and click the desired entries.

Note: Use the dropdown menus for numbers requiring a numeric answer. This will display less than/greater than/equal to options (and their combinations), followed by an entry field for the corresponding value.

The “Patient Rules” option allows the creation more detailed criteria involving various patient attributes. For example, this is how to create a rule to search for patients that are Allergic to Caffeine OR Allergic to Latex:

1. Select “Allergy” in the “Rule type” dropdown menu.
2. Click Add New Rule.
3. This opens the “Patient Allergy Rule” screen, where first item the patient is allergic to can quickly be found by entering the name, then clicking **Refresh**.

4. Click **Add** in the row corresponding to the item for which the rule will be created for (caffeine).

5. Repeat steps 3 and 4 for Latex to obtain the algorithm below:

6. Press **Close** at the top right of the screen to return to the “Patient Criteria for Study” screen.

Now, this is how to create a rule to search patients that are **Allergic to Caffeine AND Allergic to Latex.**

1. Repeat steps 1-4 for caffeine to obtain the rule that the patient is allergic to caffeine.

2. Press **Close** at the top right of the screen to return to the “Patient Search Filter” screen.

3. Repeat steps 1-4, but for Latex this time.

4. Press **Close** at the top right of the screen.

There is now a rule that searches for patients allergic to both caffeine and Latex.

By clicking the link under the “Required” response column, the grid box contents cycle between Yes/No as the response required for the patient to be eligible for the study. For example, if No is selected for an allergy to Latex rule, the patient cannot qualify for the study if he or she is allergic to Latex.

Click **Save** when the filter criteria is complete to return to the previous screen.

### 2 USING A DATA FILTER

Filters can be used to narrow down the patient list to match certain criteria for use in a call list or study.

1. Apply a filter to the “Patient List” by selecting **Use a general data filter** from the “Extended Filter” dropdown menu.

2. Select a filter from the “Extended Filter Details” section which appears on the “Patient List”, then click **Refresh** to update the list.
3. Above the list of filtered patients are various action buttons. Before clicking any of these buttons, one or more patients need to be selected by clicking the checkbox next to these patients’ names. These buttons will only affect those patients rather than all of the patients found by the filter.

- **Append Call List**—The selected patients will be added to an existed call list which can be selected from the menu that appears.
- **Save Call List**—The selected patients will be grouped together in a new call list. For more information on creating such call lists, refer to the *Call Lists* how-to guide.
- **Demographics**—Demographic information for the selected patients will be displayed alongside the filter criteria.
  
  ![Choose Demographic Grouping](image)
  
  The **Demographics** button opens the “Patient Demographics” screen, where the user should select a category of demographics from the dropdown menu to display bar charts for which categories the selected patients fall into.

- **Manually Schedule**—Only one patient can be selected for this action. Allows user to manually schedule the patient for an appointment. For more information, refer to the *Manual Scheduling* how-to guide.
- **Visit Plan & Appts**—Only one patient can be selected for this action. If the patient is in a study, a screen will open to display the appointments scheduled for the patient as well as the study visits and their completion status for that patient. If the patient is not in a study, an error message will appear since this screen cannot be viewed.
- **Email**—Sends an email to the selected patients (as long as the patient email address is entered in the system). A popup will appear with the email text entry field.
- **Prescreen**—Only one patient can be selected for this action. Displays a list of the studies the patient has been pre-screened for.
- **History**—Only one patient can be selected for this action. Displays a list of stipends for the selected patient.
- **Delete**—Deletes the selected patients from the Clinical Conductor patient database.