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## Introduction

The Filter Builder is a function that is currently present within the Whiteboard, Quality Measures, Patient Portal, Data Mining Custom Reports and Promoting Interoperability Statistics. Filters are used to filter information in or out of an application to get the results needed. This document will explain how to add an existing filter to the Filter Preferences Screen, how to create a new filter and how to edit an existing filter.

## Filter Builder

### Security

In order to use Filter Builder, access to the Filter Builder Application will be necessary. This will allow the login to add filters to their login, create new filters or edit existing filters.

The path to access the Application rules for a login is: **System Administration > Logins > select a Login > Applications.**

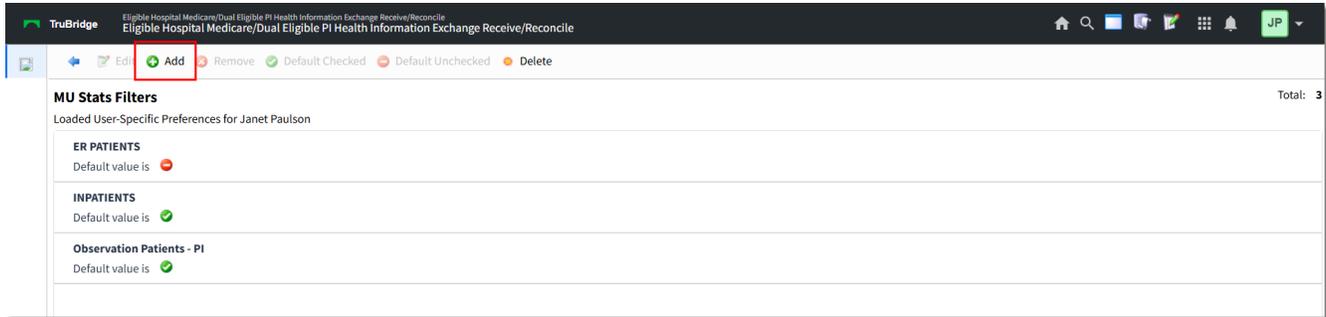
In addition to the application access, the following Behavior Controls may be added based on desired access. The path to access the Behavior Control rules for a login is: **System Administration > Logins > select a Login > Behavior Controls.**

- **Create new filters:** Allows a new filter to be created.
- **Edit existing filters:** Allows an existing filter to be edited.
- **Modify preferences:** Allows a preference to be added to a login.
- **Modify value of a preference (checked, unchecked):** Allows the default value of the preference to be changed.

## Adding an Existing Filter

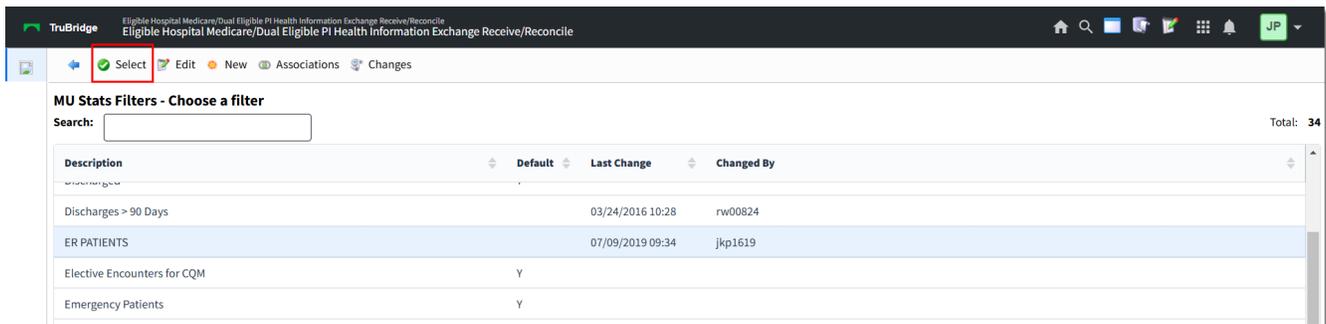
Once a custom filter is created, it will be added to the filter lookup screen and will be available for a user, group/role or facility to use. Edits may be made to an existing filter if it is one the user has already created. Users in the System Administrator role will be able to create and make changes to a global filter.

To begin creating a filter, on the Filter Preferences Screen, select **Add** from the action bar.



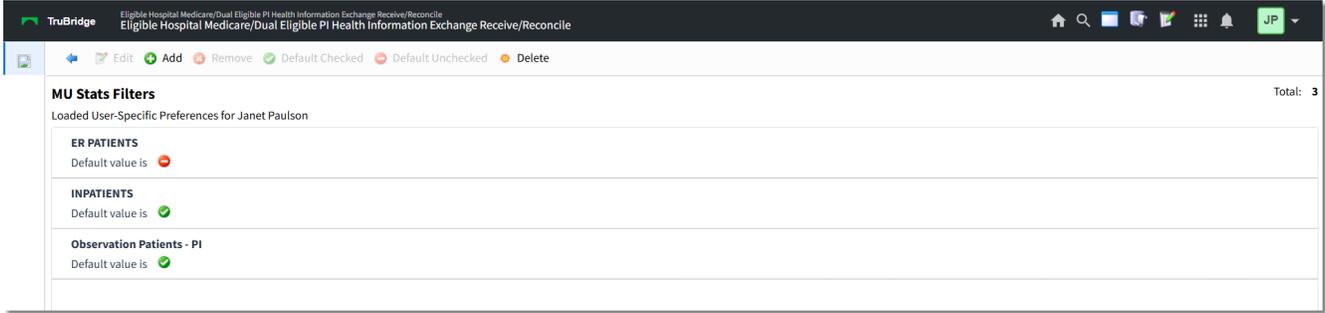
Filter Preferences Screen

To choose an existing filter, select the name of the filter from the filter lookup screen so it is highlighted in blue and **Select** from the action bar. If more filters are needed, keep repeating this process. A search option is available at the top of the screen if needed.



Filter Lookup Screen

As filters are added, they will display on the Filters screen. When the Default Value is a  red minus sign, the checkbox for the filter will default to unchecked. When the Default Value is a  green check sign, the checkbox for the filter will default to checked. The Remove option will allow the filter to be removed from the login. To exit the Filters screen, select the **back arrow**.



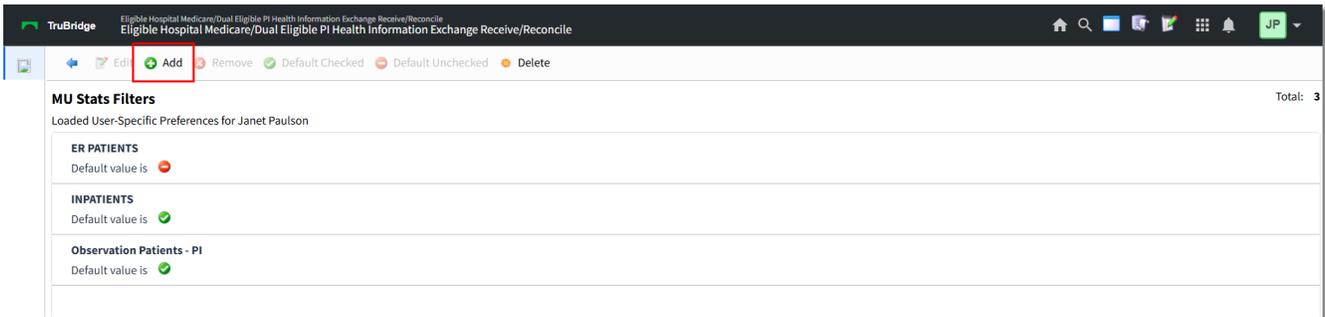
Filter Preferences

Once a filter is defined and/or added it will be available for use.

**NOTE:** Adjustments to the filters may be made at any time.

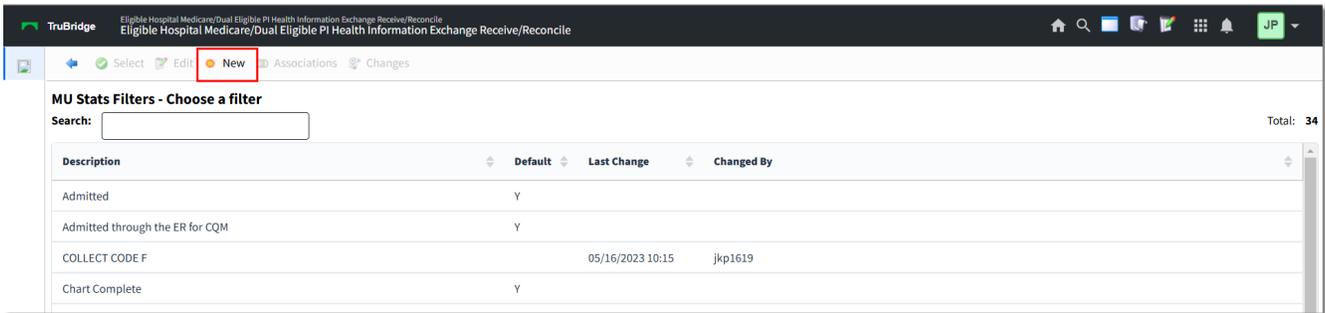
### New Filter

To create a new filter, select **Add** from the action bar.



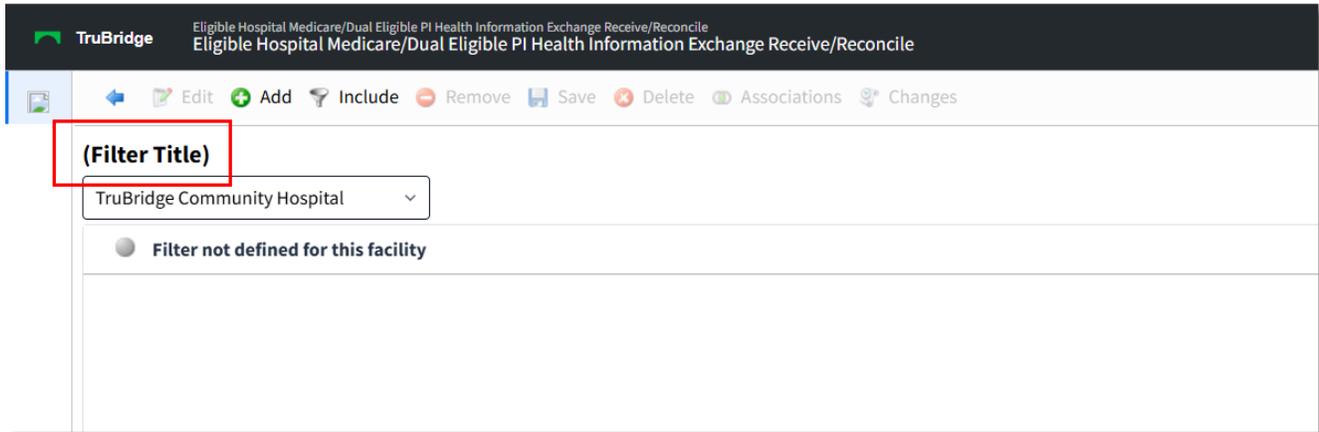
Filter Preferences Screen

Select **New** from the action bar of the filter lookup screen.



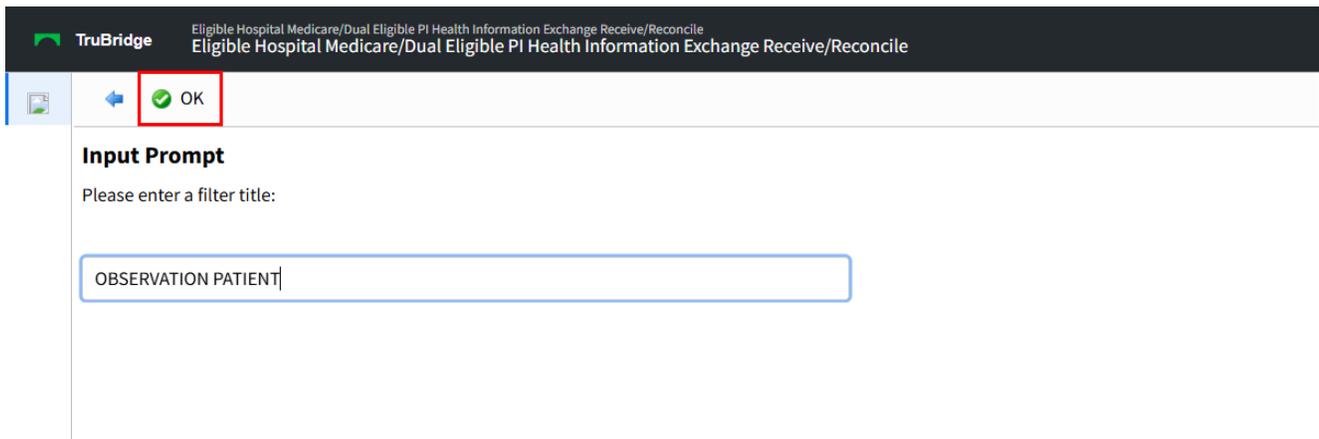
Filter Selection Screen

The new filter will need to be named. To do this select **(Filter Title)** in the upper left hand corner of the screen.



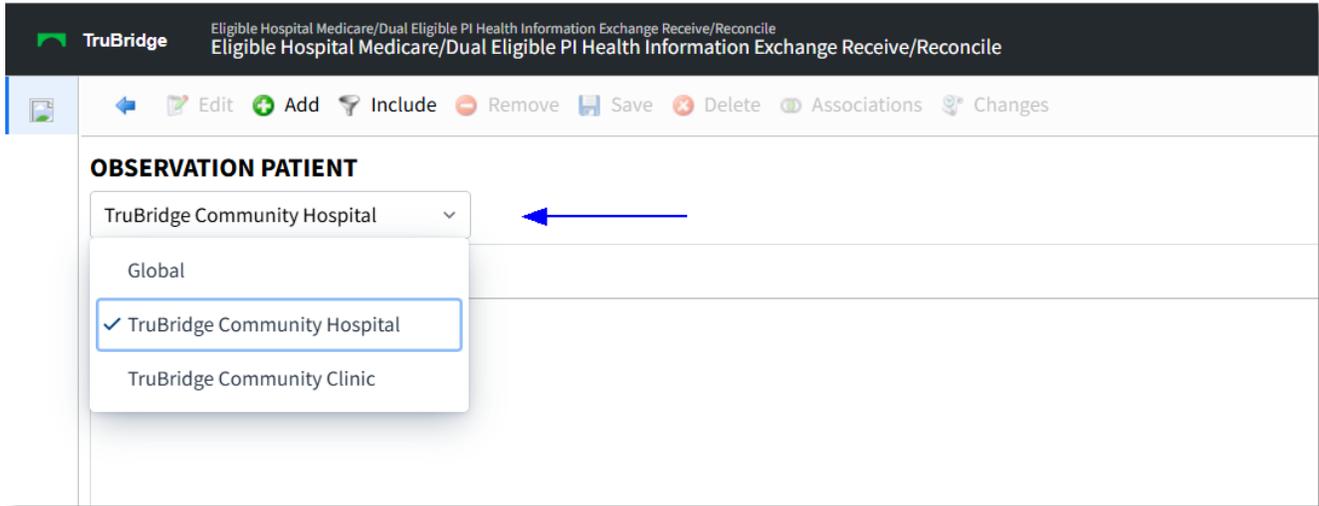
Filter Setup

Type the name of the filter in the box provided, and select **OK** from the action bar.



Filter Setup

Then select the level at which the filter will be used.

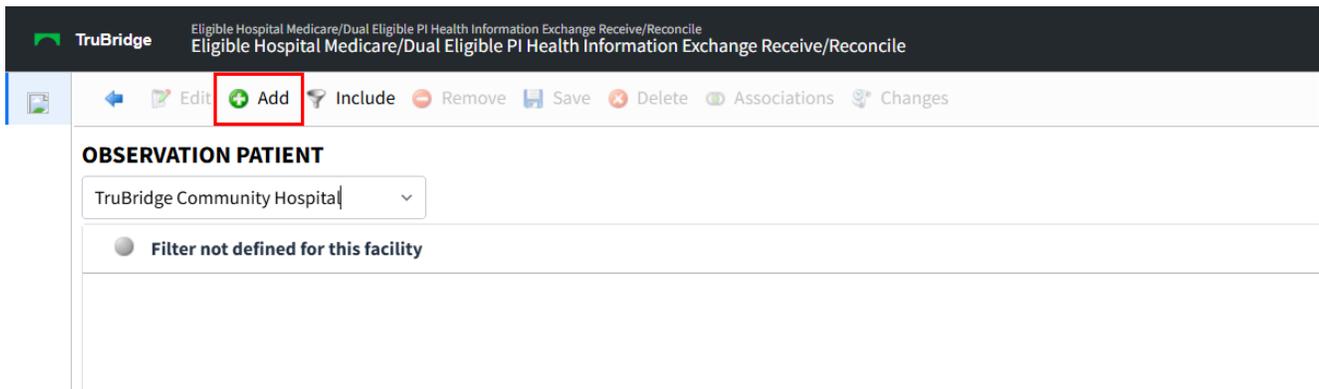


Filter Setup

Below is an explanation of each level:

- **Facility:** This is a facility-specific defined filter.
- **Global:** The global definition will be used if no facility-specific definition exists.
- **TruBridge Default:** This only exists for filters set up by TruBridge. This level is not able to be modified and will be used if no facility-specific or global definition exists.

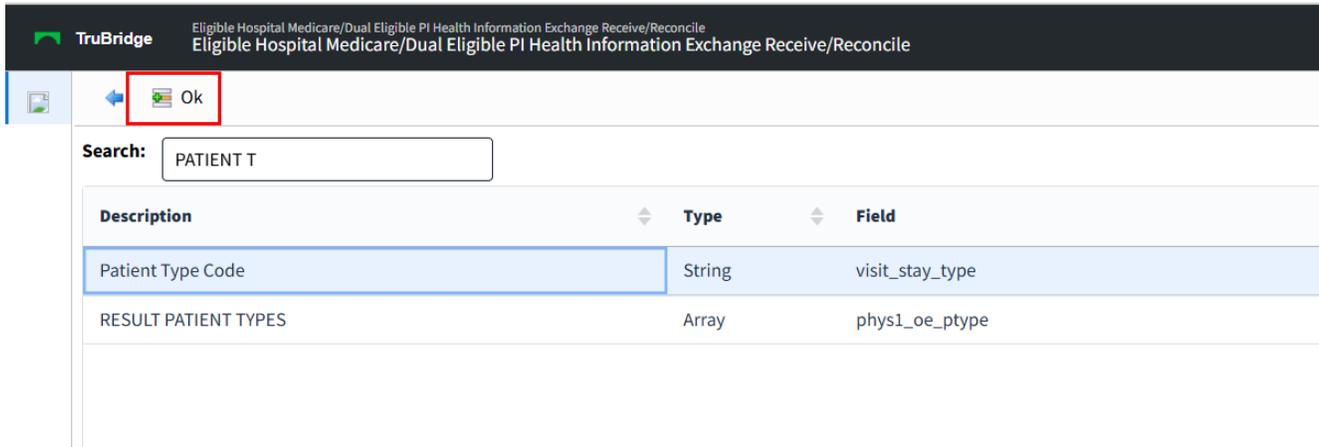
Select **Add** from the action bar to define the filter.



Filter Setup

A list of fields to filter will then display. A search option is available at the top of the screen if needed. Select the field to be filtered so that it is highlighted in blue, and select **OK** from the action bar.

**NOTE:** When using the search option, whatever is typed will search the entire description of the field.

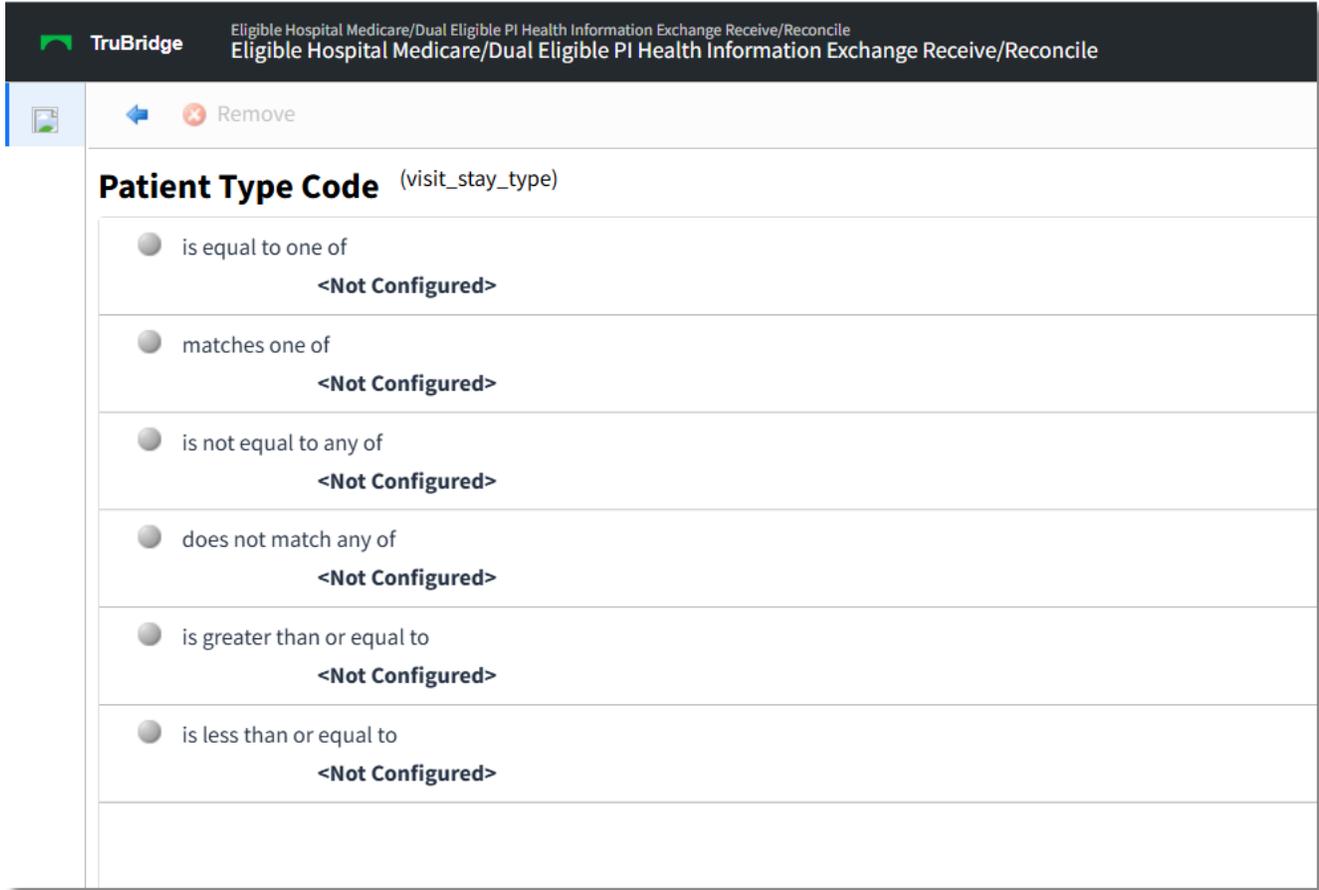


The screenshot shows the TruBridge interface for filtering. At the top, the title bar reads "Eligible Hospital Medicare/Dual Eligible PI Health Information Exchange Receive/Reconcile". Below this, there is a search bar containing "PATIENT T". An "Ok" button is highlighted with a red box. Below the search bar is a table with the following data:

Description	Type	Field
Patient Type Code	String	visit_stay_type
RESULT PATIENT TYPES	Array	phys1_oe_ptype

Filter Setup

The values for the filter will need to be set up. Double-click **<Not Configured>** for each of the value statements that are applicable. Not every statement needs to have a value but at least one will.



**TruBridge** Eligible Hospital Medicare/Dual Eligible PI Health Information Exchange Receive/Reconcile  
Eligible Hospital Medicare/Dual Eligible PI Health Information Exchange Receive/Reconcile

Remove

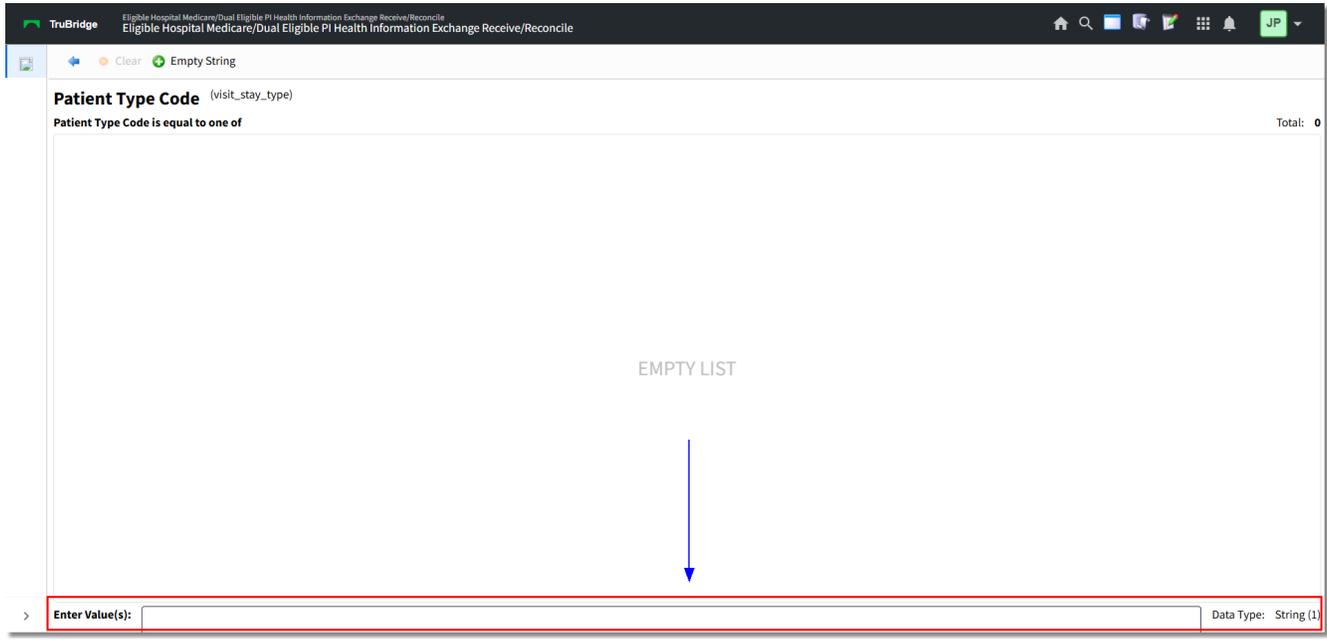
**Patient Type Code** (visit\_stay\_type)

- is equal to one of  
**<Not Configured>**
- matches one of  
**<Not Configured>**
- is not equal to any of  
**<Not Configured>**
- does not match any of  
**<Not Configured>**
- is greater than or equal to  
**<Not Configured>**
- is less than or equal to  
**<Not Configured>**

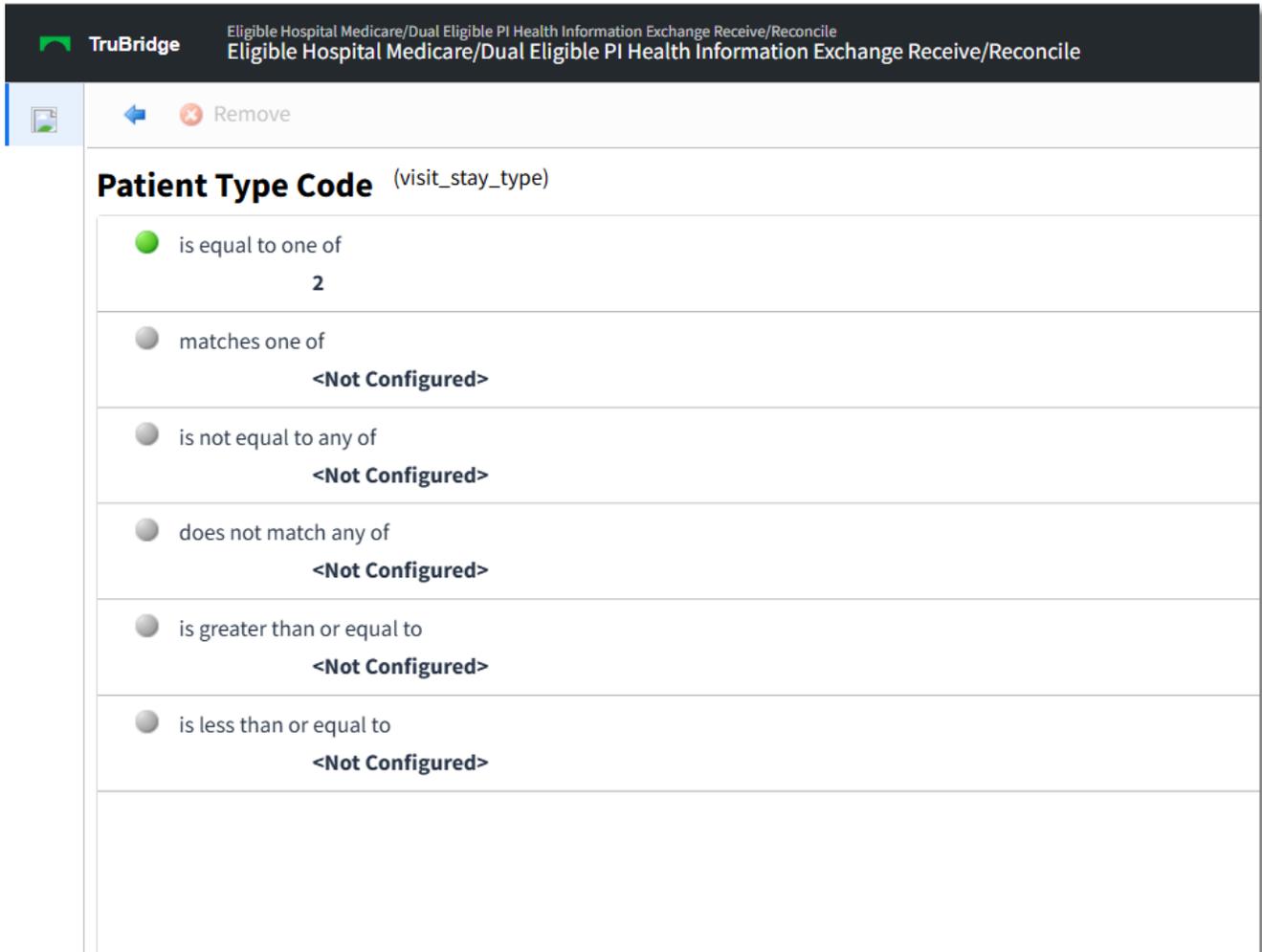
Filter Setup

The top of the screen will display which value statement was selected. At the bottom of the screen, enter in the value(s) to be configured, and select the Enter key to add it to the screen. To remove a value that

has already been added, select the  red X next to the value. To remove all values from the screen, select **Clear** from the action bar. After all values have been added, select the **back arrow** from the action bar.



The configured values will display for each value statement, if any were entered. Select the **back arrow** from the action bar to return to the filter setup once all values have been configured.

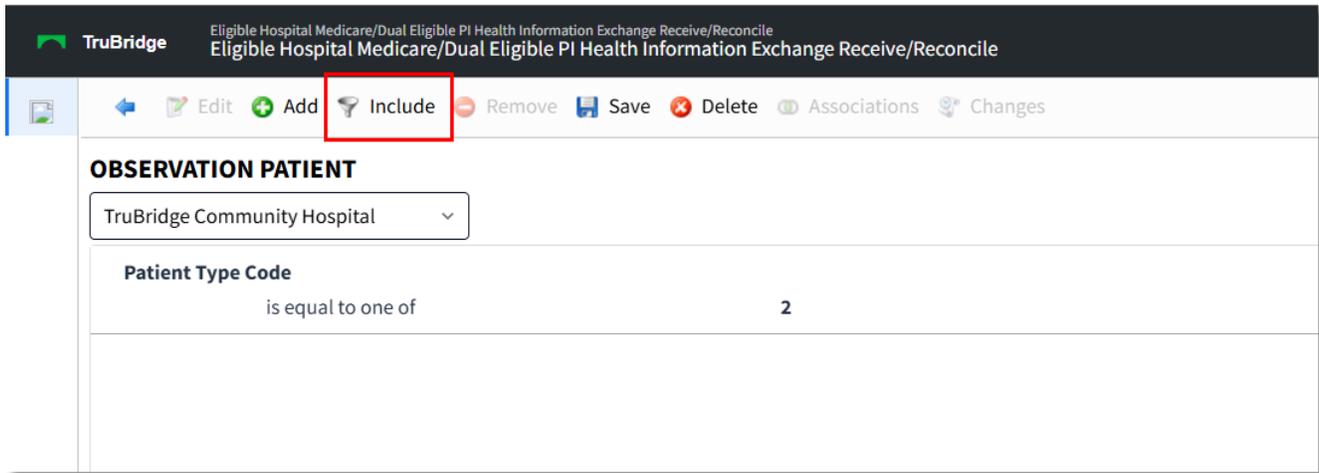


The screenshot shows the TruBridge interface for configuring a filter. At the top, the header includes the TruBridge logo and the text "Eligible Hospital Medicare/Dual Eligible PI Health Information Exchange Receive/Reconcile". Below the header is an action bar with a back arrow icon and a "Remove" button. The main content area is titled "Patient Type Code (visit\_stay\_type)". It contains a list of filter conditions, each with a radio button and a configuration field:

- is equal to one of  
2
- matches one of  
<Not Configured>
- is not equal to any of  
<Not Configured>
- does not match any of  
<Not Configured>
- is greater than or equal to  
<Not Configured>
- is less than or equal to  
<Not Configured>

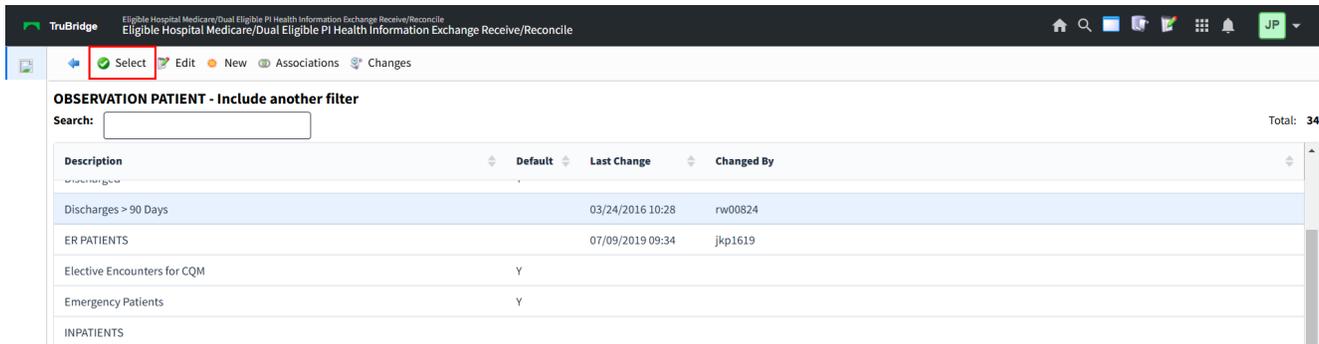
Filter Setup

To include other filters along with this filter, select **Include** from the action bar.



Filter Setup

The filter lookup screen will then display. The title of the current filter will display at the top of the screen and "Include another filter" will be after it. Select one of the filter titles so it is highlighted in blue, and select **Select** on the action bar.



Filter Setup

If more than one value is added to the filter, there are two options at the bottom of the screen to further define the filter.

Filter Setup

The following filter methods may be used when more than one value is added to a filter.

- **Show records that match ANY of the items above (or):** If selected, any of the values on the filter may be on an account for it to generate. For example, if the filter is set up with a stay type of 2 and a service code of V, the account can have a stay type of 2 OR a service code of V to generate.

- **Show records that match ALL of the items above (and):** If selected, all of the values on the filter have to be on an account for it to generate. For example, if the filter is set up with a stay type of 2 and a service code of V, the account has to have a stay type of 2 AND a service code of V to generate.

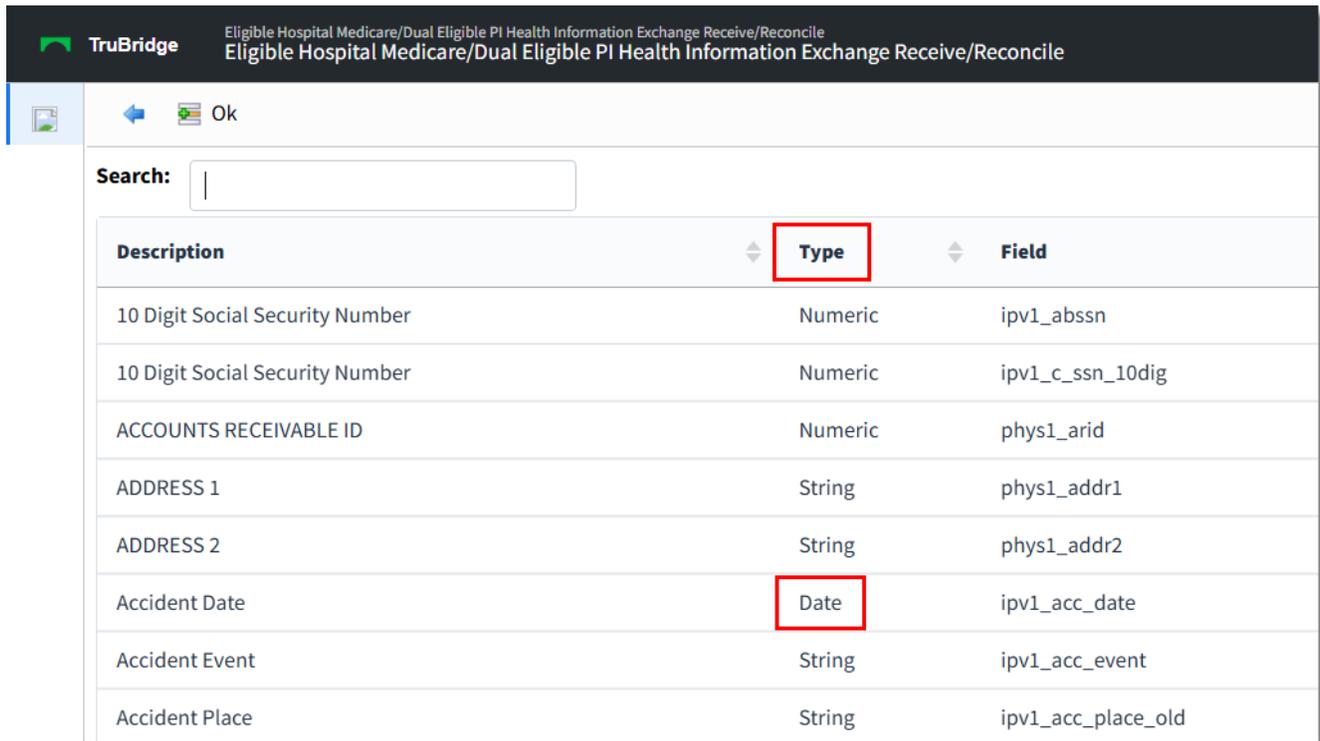
If all information for the filter has been added and configured, select **Save** from the action bar to retain the changes. Select **Delete** from the action bar to remove the filter. Select the **back arrow** to return to the filter lookup screen.

The new filter will then be displayed in the filter lookup screen.

### Relative Date Values

Filters may be set up using a relative date value. This will allow filters to be defined by years, months, weeks, days, hours, minutes and seconds. An example of this would be setting up a filter for patients who have been discharged for 90 days or more.

When selecting the values to be added to the filter, the ones that have "Date" as the type of value, will be the ones that will have relative date value abilities.



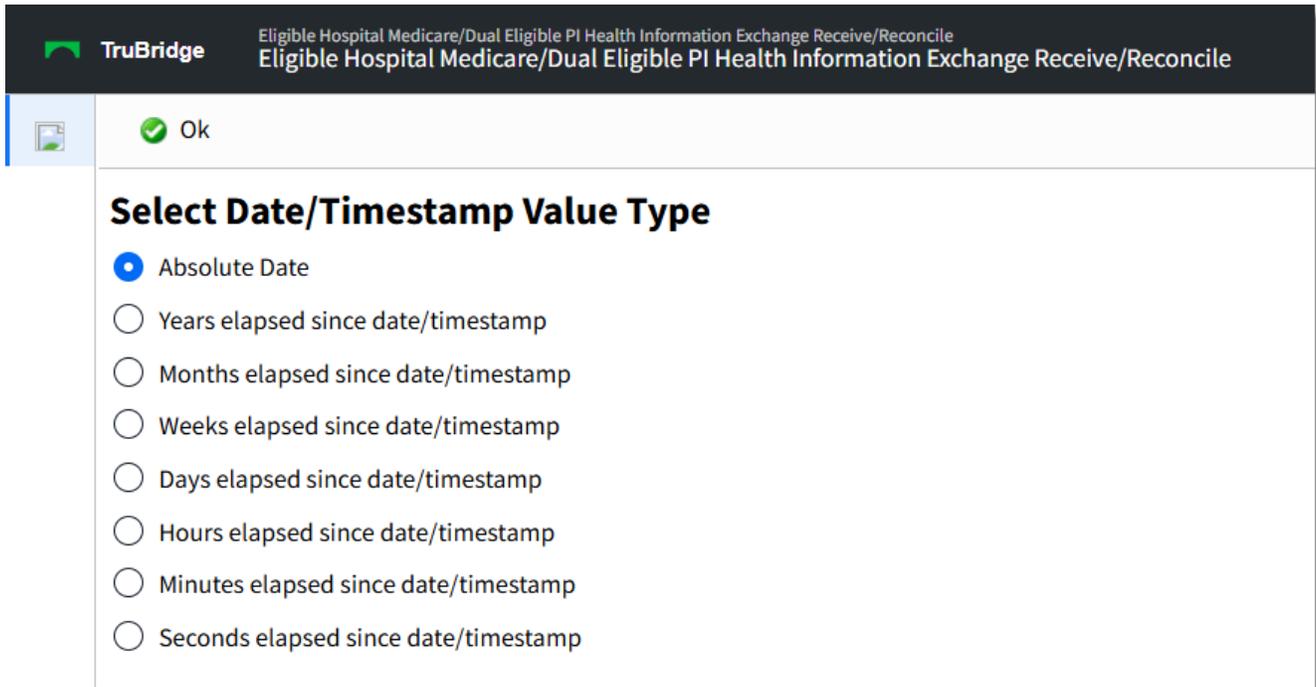
The screenshot shows the TruBridge interface with a search bar and a table of fields. The 'Type' column header and the 'Date' value in the 'Accident Date' row are highlighted with red boxes.

Description	Type	Field
10 Digit Social Security Number	Numeric	ipv1_abssn
10 Digit Social Security Number	Numeric	ipv1_c_ssn_10dig
ACCOUNTS RECEIVABLE ID	Numeric	phys1_arid
ADDRESS 1	String	phys1_addr1
ADDRESS 2	String	phys1_addr2
Accident Date	Date	ipv1_acc_date
Accident Event	String	ipv1_acc_event
Accident Place	String	ipv1_acc_place_old

Relative Date Value Lookup

Once a value is selected, select the appropriate radio button that applies to the filter being set up and select **Ok**.

**NOTE:** If a certain date needs to be entered, select the "Absolute Date" option.



The screenshot shows a software interface with a dark header bar. On the left is the TruBridge logo. The header text reads "Eligible Hospital Medicare/Dual Eligible PI Health Information Exchange Receive/Reconcile". Below the header is a light blue bar with a document icon and a green checkmark next to the text "Ok". The main content area is white and contains the title "Select Date/Timestamp Value Type" followed by a list of radio button options:

- Absolute Date
- Years elapsed since date/timestamp
- Months elapsed since date/timestamp
- Weeks elapsed since date/timestamp
- Days elapsed since date/timestamp
- Hours elapsed since date/timestamp
- Minutes elapsed since date/timestamp
- Seconds elapsed since date/timestamp

Select Date/Timestamp Value Type

### Array Values

Filters may be set up using an array of values.

When selecting the values to be added to the filter, the ones that have "Array" as the type of value, will be the ones that will have array value abilities.

Description	Type	Field
Critical Access State	Array	ipv1_cahstate
ELECTRONIC FORMS PHY SEND TYPE	Array	phys1_eform_phytype
ELECTRONIC FORMS SEND DOCUMENT TYPE	Array	phys1_eform_docutype
HPSA SUMMARY CDS	Array	phys1_hpsasumcd
PA F/C	Array	phys1_paafc

Array Values Lookup

Once a value is selected, double-click **<Not Configured>** to add the data elements for the array.

**ELECTRONIC FORMS PHY SEND TYPE** (phys1\_eform\_phytype)

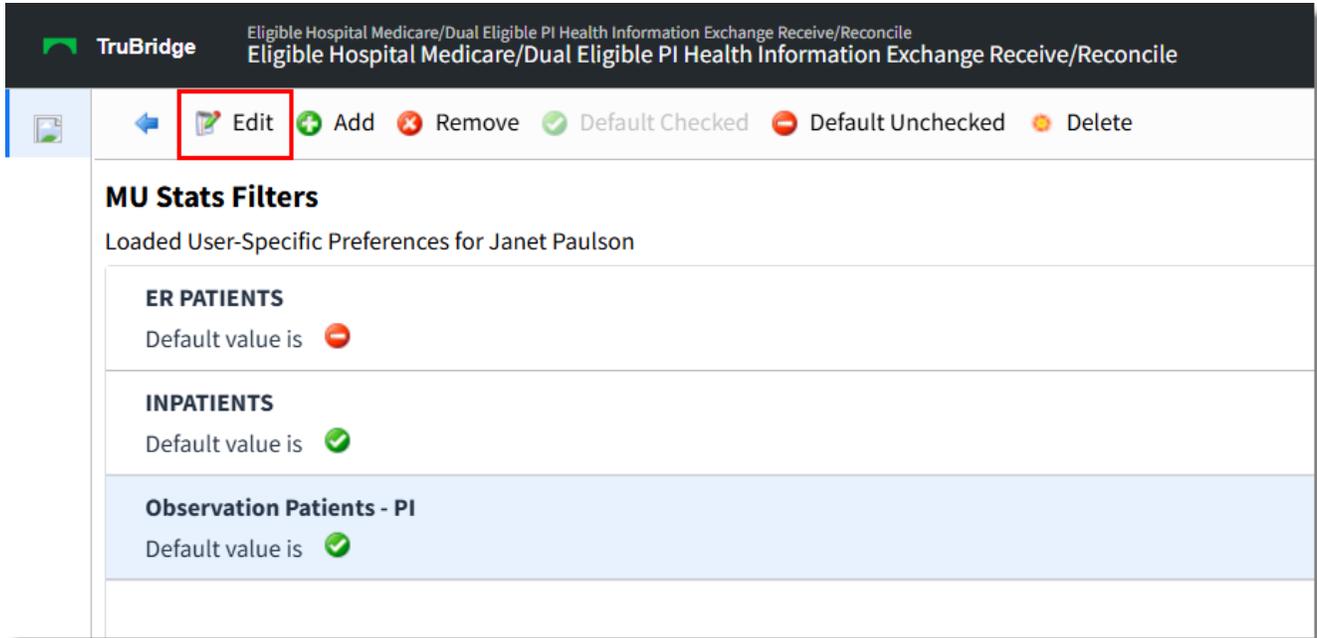
has an element equal to one of  
**<Not Configured>**

Array Values Setup

## Edit Filter

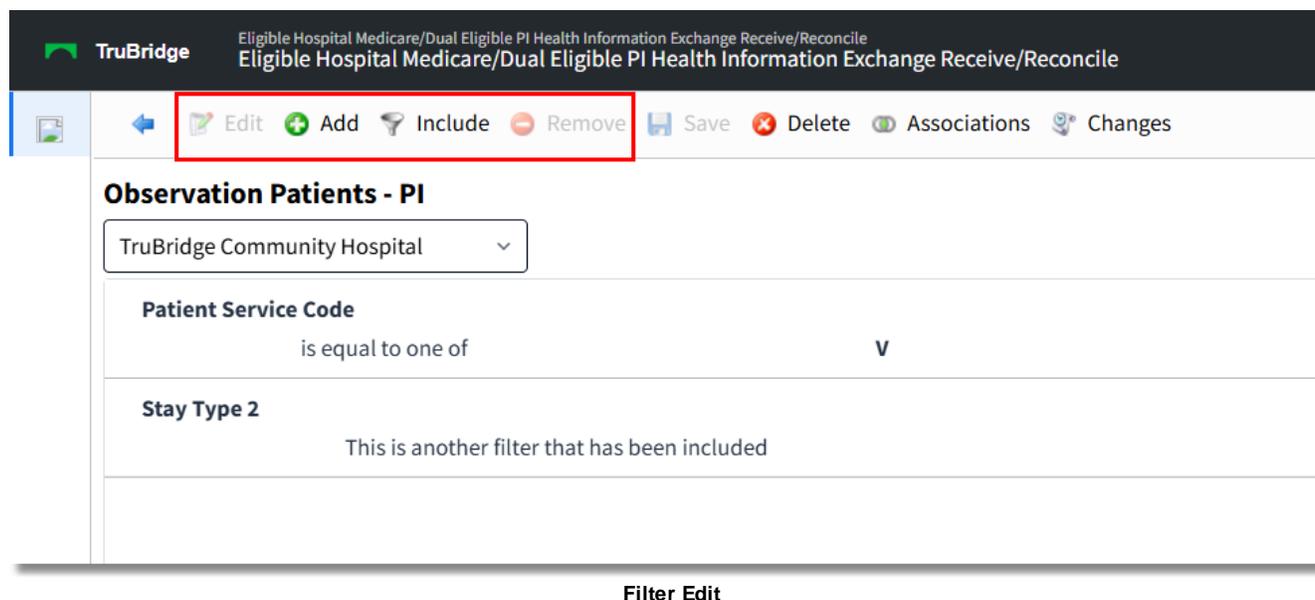
Edits can be made to existing filters if the need arises. Users can edit any of the filters they have set up for themselves and for their group. Only a System Administrator may make changes to the facility filters.

To edit a filter from the Filter Preferences screen, select the filter and then select **Edit** from the action bar.



Filter Preferences Screen

The current configuration for the filter will display. Use the options on the action bar to edit the filter.



The following options may be selected from the action bar to further configure the filter.

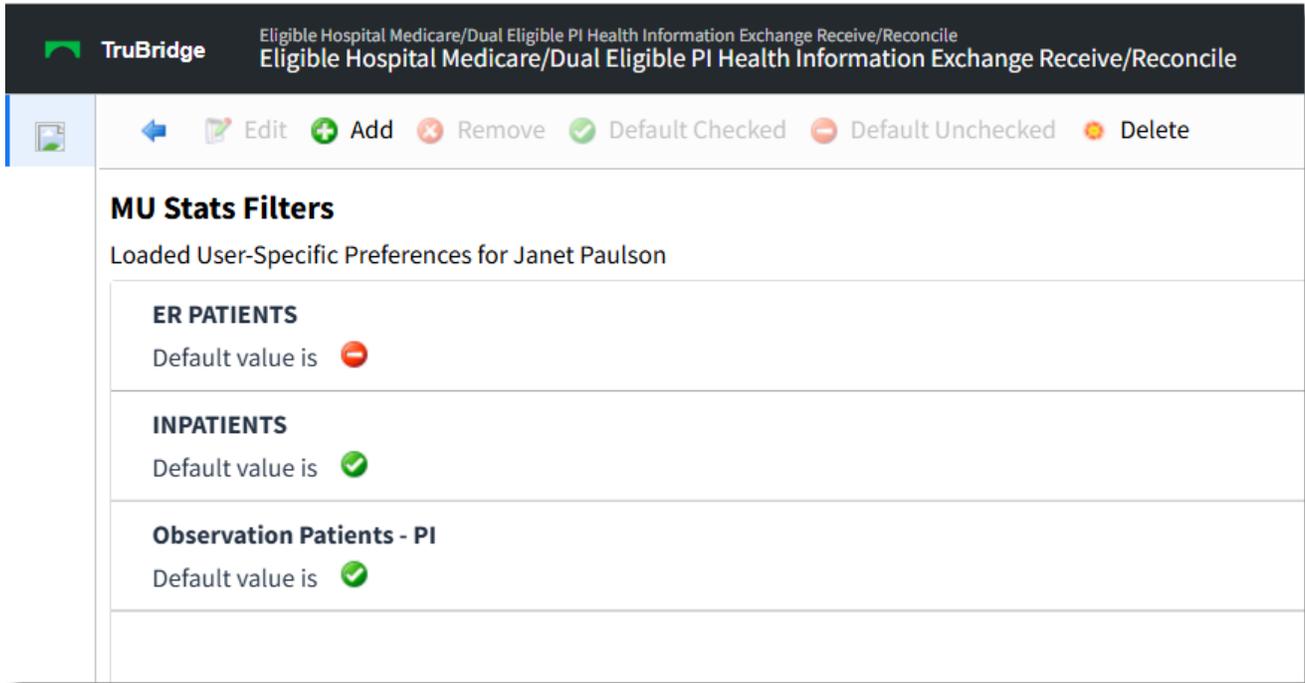
- **Edit:** Select this option to edit the current values on the filter.
- **Add:** Select this option to add more fields to the filter.
- **Include:** Select this option to add other filters to this filter.
- **Remove:** Select this option to remove an existing field on the filter.

**NOTE:** If more than one value is added to the filter be sure to address the Filter Method options at the bottom of the screen to further define the filter. See [New Filter](#) for more information on the two Filter Method options.

Once all edits are complete, select **Save** from the action bar.

## Filter Preferences Screen

The Filter Preferences Screen will display all filters that have been added to the user login.



Filter Preferences Screen.

Below is an explanation of each option on the action bar:

- **Edit:** Select this option to make changes to the selected filter.
- **Add:** Select this option to add a new filter.
- **Remove:** Select this option to remove the selected filter.
- **Default Checked:** Select this option to check the selected filter. This will default the filter to checked when in an applicable filter application.
- **Default Unchecked:** Select this option to uncheck the selected filter. This will default the filter to unchecked when in an applicable filter application.

If more than one filter is Checked at the same time, the Filter Method options at the bottom of the screen will need to be addressed.

- **Show records that match ANY of the items above:** If selected, accounts will need to meet the criteria of at least one active filter to display. For example, if the filter A is set up to display Inpatients and Filter B is set up to display Observation patients, then accounts that are either Inpatient OR Observation will display.
- **Show records that match ALL of the items above:** If selected, accounts will need to meet the criteria of all active filters to display. For Example, For example, if the filter A is set up to display Stay Type 1 Patients and Filter B is set up to display patients with a Service Code of V, then accounts must have both a Stay Type of 1 AND a Service Code of V to display.

## Associations

The Associations option will display the usages of a given filter. This option is available from the filter lookup screen and the individual filter's setup screen.

TruBridge Eligible Hospital Medicare/Dual Eligible PI Health Information Exchange Receive/Reconcile

Eligible Hospital Medicare/Dual Eligible PI Health Information Exchange Receive/Reconcile

Select Edit New **Associations** Changes

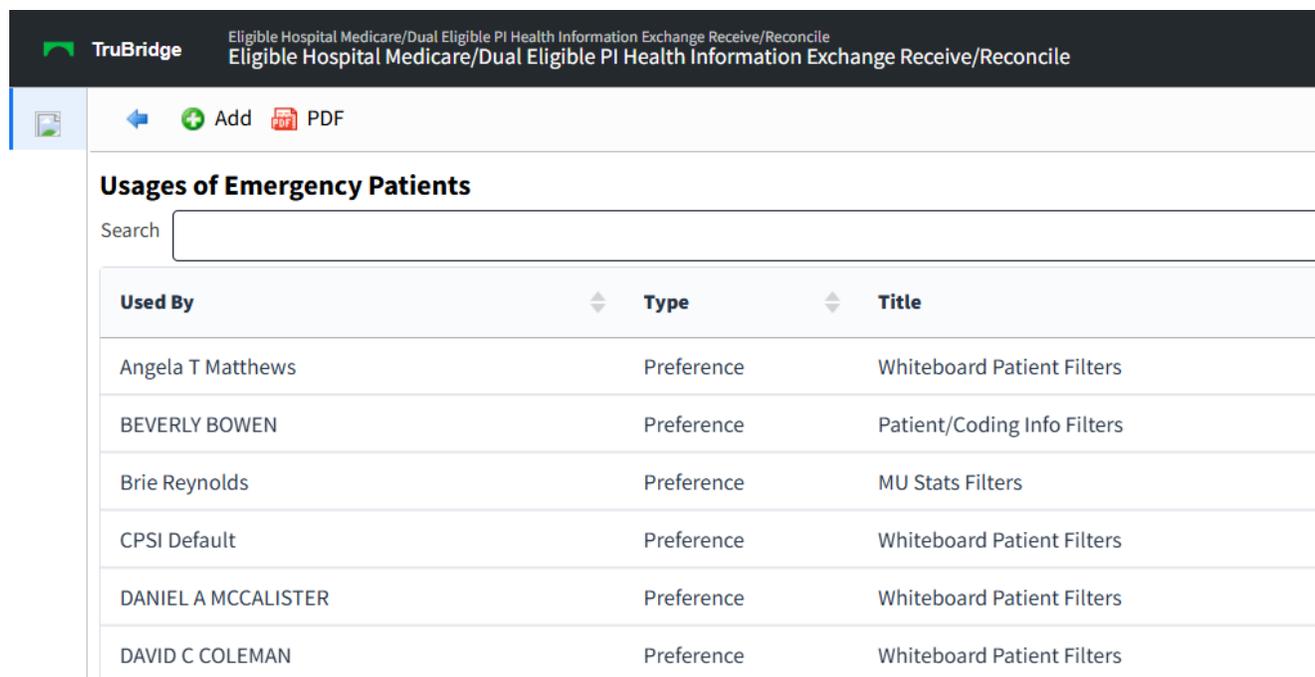
**MU Stats Filters - Choose a filter**

Search:

Description	Default	Last Change	Changed By
Elective Encounters for CQM	Y		
Emergency Patients	Y		
INPATIENTS			
IV		09/20/2024 13:20	stj6966

Filter Lookup Screen

Once Associations is selected, the screen will display all users who are using the filter along with the type and application where the filter is being utilized.



The screenshot shows the TruBridge interface for 'Eligible Hospital Medicare/Dual Eligible PI Health Information Exchange Receive/Reconcile'. The main content area is titled 'Usages of Emergency Patients' and includes a search bar. Below the search bar is a table with the following data:

Used By	Type	Title
Angela T Matthews	Preference	Whiteboard Patient Filters
BEVERLY BOWEN	Preference	Patient/Coding Info Filters
Brie Reynolds	Preference	MU Stats Filters
CPSI Default	Preference	Whiteboard Patient Filters
DANIEL A MCCALISTER	Preference	Whiteboard Patient Filters
DAVID C COLEMAN	Preference	Whiteboard Patient Filters

Filter Associations

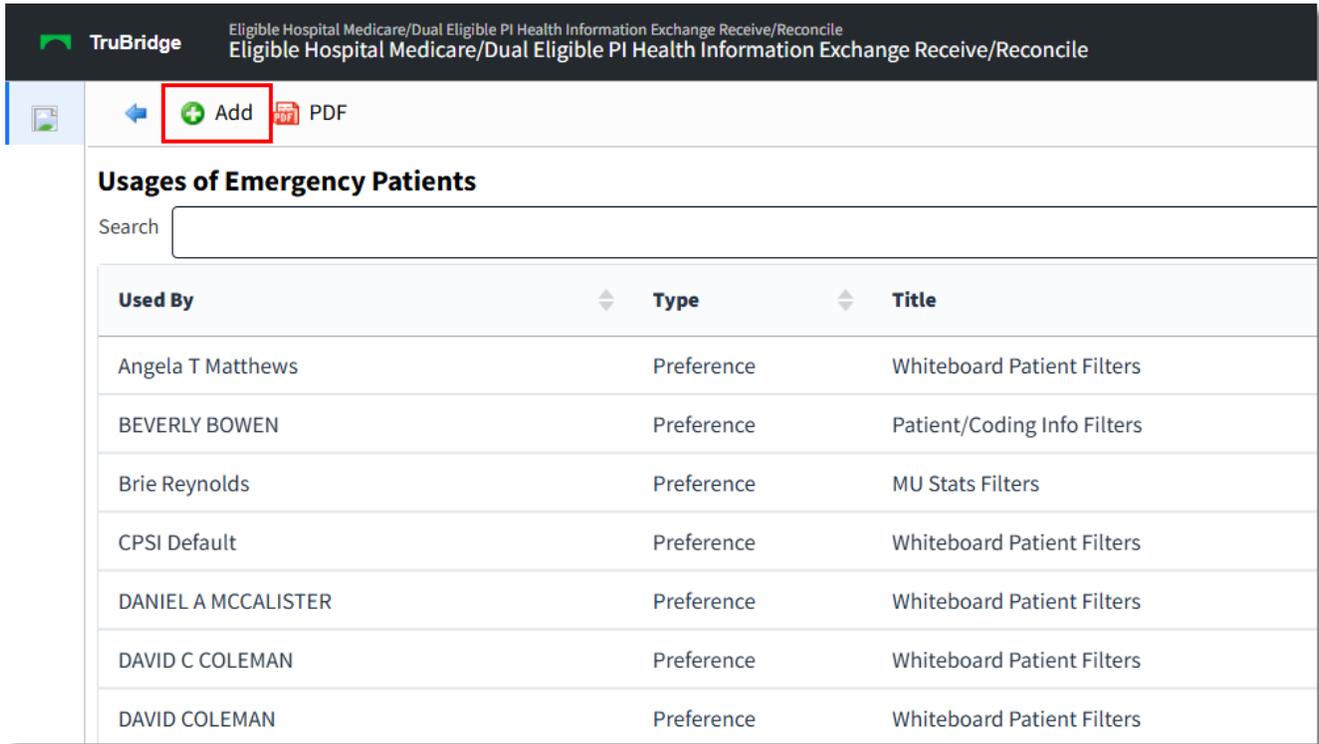
The Type column will show one of three options:

- **Preference:** This indicates that the filter is being used by a user or facility.
- **Filter Include:** This indicates that the filter is being included as part of another filter's definition.
- **Filter Definition:** This indicates that the filter itself is defined.

Selecting **PDF** from the action bar will produce the associations in a report format.

**Add**

The Add option may be used to associate multiple logins/roles to a filter. To begin, select **Add** from the Associations screen.



TruBridge Eligible Hospital Medicare/Dual Eligible PI Health Information Exchange Receive/Reconcile

Eligible Hospital Medicare/Dual Eligible PI Health Information Exchange Receive/Reconcile

← Add PDF

### Usages of Emergency Patients

Search

Used By	Type	Title
Angela T Matthews	Preference	Whiteboard Patient Filters
BEVERLY BOWEN	Preference	Patient/Coding Info Filters
Brie Reynolds	Preference	MU Stats Filters
CPSI Default	Preference	Whiteboard Patient Filters
DANIEL A MCCALISTER	Preference	Whiteboard Patient Filters
DAVID C COLEMAN	Preference	Whiteboard Patient Filters
DAVID COLEMAN	Preference	Whiteboard Patient Filters

Filter Associations

The screen will display with "Usages of" followed by the current filter title. Two columns will display on the screen. The Associations column will display the logins/roles that currently have the filter added as a preference. The Add Associations column will allow the filter to be added as a preference to other logins/roles.

Select the Logins or Roles radio button from the Add Associations column to find the desired login or role. A search bar and sort option are available. Once the desired login/role is found, double-click it from the list. This will add the login/role to the Associations column. Continue this process until all desired logins/roles have been added.

If the filter needs to be removed from a login/role, select the login/role from the Associations column, then select **Remove** from the action bar. When finished, select the **back arrow** to exit the screen.

The screenshot shows the 'Filter Builder' interface for 'Usages of Emergency Patients (Default)'. It is divided into two main sections: 'Associations' and 'Add Associations'.

**Associations Section:**

- Filters:  User,  Role,  Facility,  Global
- Options:  Include,  Definition
- Search: [Empty search box]
- Table of current associations:

Name	Filter Type
Angela T Matthews	Whiteboard Patient Filters
BEVERLY BOWEN	Patient/Coding Info Filters
Brie Reynolds	MU Stats Filters
CPSI Default	Whiteboard Patient Filters
DANIEL A MCCALISTER	Whiteboard Patient Filters
DAVID C COLEMAN	Whiteboard Patient Filters
DAVID COLEMAN	Whiteboard Patient Filters
DIANE COLE JONES	Whiteboard Patient Filters
DIANE COLE JONES	MU Stats Filters
JAMES M BAXTER	Whiteboard Patient Filters
JOHNSON RICHARD C	Whiteboard Patient Filters
Jason Greene	Whiteboard Patient Filters
Jessica Kraus	ED Patient Filters

Total: 34

**Add Associations Section:**

- Associate to Context: **MU Stats Filters**
- Options:  Logins,  Roles
- Filter:  All,  Enabled,  Disabled
- Search: [Empty search box]
- Sort: Login
- Table of available associations:

<input type="checkbox"/> a00953	DANIELLE WEISKOPF
<input type="checkbox"/> a051480	ZORNMAN ANDREA K
<input type="checkbox"/> a104699	JACKSON DAVID B
<input type="checkbox"/> a20151	AVA I MCCARTER
<input type="checkbox"/> aba4597	Andrew Allen
<input type="checkbox"/> aba4597p	ALLEN ANDY
<input type="checkbox"/> abo4292	OWEN AMY
<input type="checkbox"/> acm20120	Aaron Chase Marshall
<input type="checkbox"/> acm510	Ashley Menefee
<input type="checkbox"/> acm510p	Ashley Menefee
<input type="checkbox"/> act20152	ANDREW C THOMPSON

Selected: 0 Total: 698

Filter Associations - Add