FLORIDA HIE



AT A GLANCE:

Advanced Filter Builder in Population Explorer

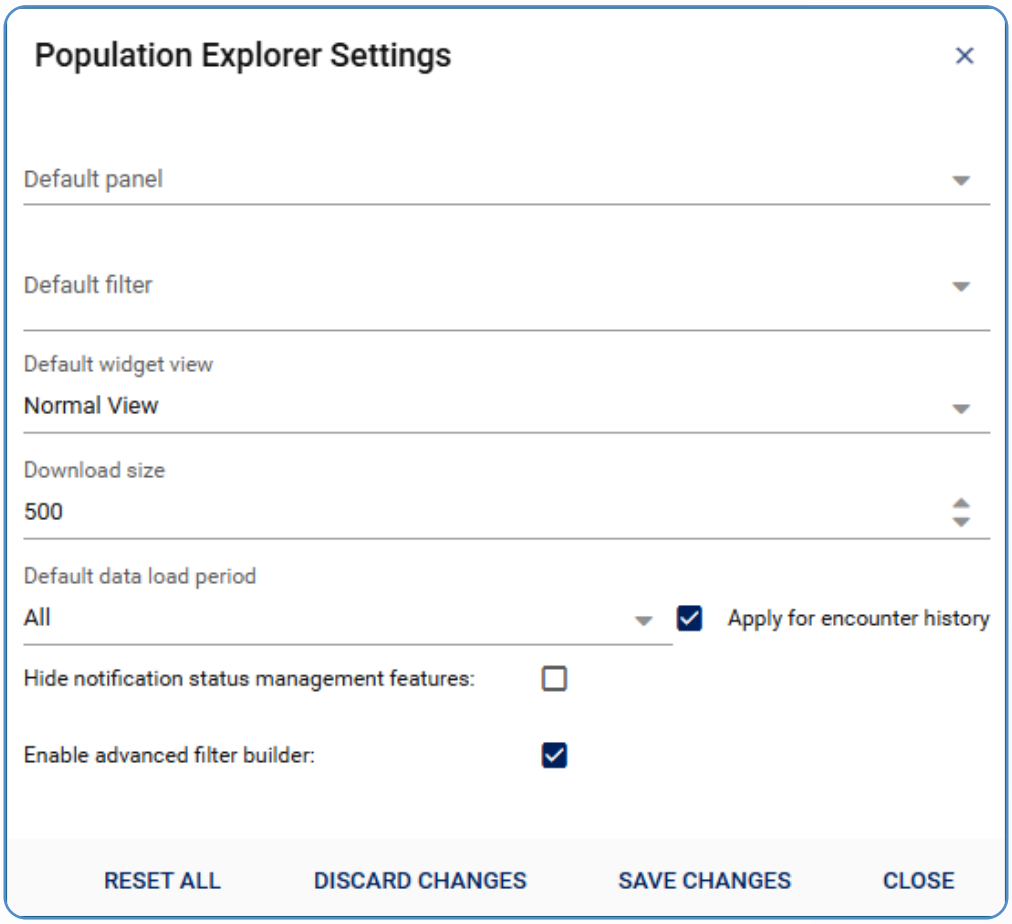
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The Advanced Filter Builder (AFB) enables users to create complex population filters by combining panels and applying Boolean logic to data elements available within Population Explorer. AFB is most useful when Quick Filters do not provide the level of specificity needed to identify a target population, event, or combination of multiple panels.

Use Advanced Filter Builder when:

- **Quick Filters** do not provide enough specificity.
- **You need** to include or exclude lists of values.
- **Multiple criteria** must be combined using AND/OR logic.
- **You need** to filter across multiple panels simultaneously.

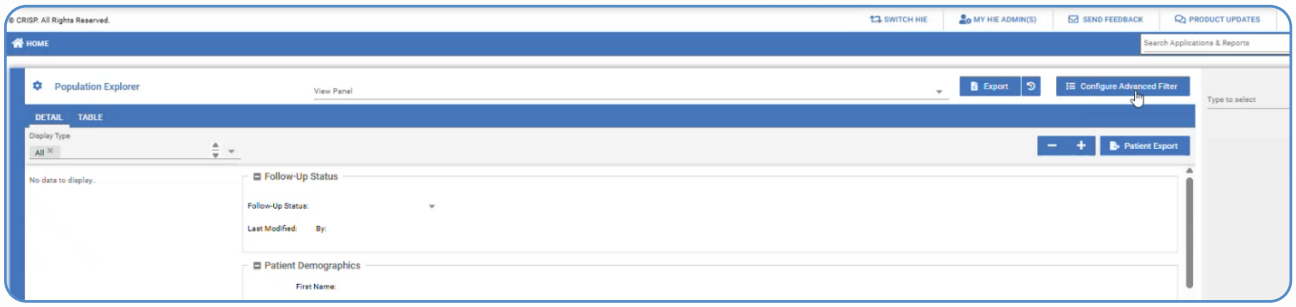


The Advanced Filter Builder must be enabled before first use. Filters built using AFB can be shared amongst others with access to those panel(s).

Below is a step-by-step example of how to build a filter in the Advanced Filter Builder. Advanced Filter Builder is to be utilized by a subset of users whose needs may not be met through the other filter options. You can apply any combination of filters to criteria contained in encounters or notifications and customize what is displayed. This tool can be used to include or exclude lists of criteria (i.e. diagnosis codes) or select multiple values to be evaluated and viewed at one time (i.e. discharges OR admits in the last X number of days).

For more details on the use of the AFB tool, please see the Population Explorer User Guide, pages 29-38.

For Organizations: The Florida HIE - https://www.flhie.org/wp-content/uploads/2026/06/v1._Population-Explorer-User-Guide_FLHIE.pdf



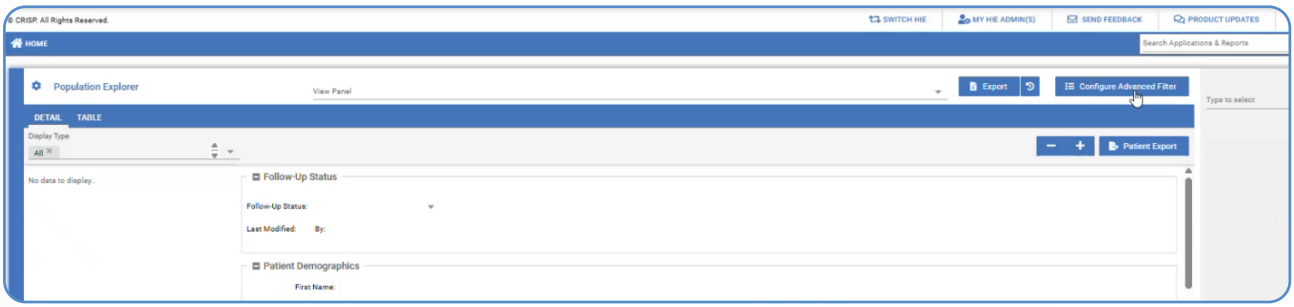
STEP 1

Start with panel selection:

1. Click IN on the left-hand menu.
2. Select PANEL from the left-hand menu.
3. Use the drop-down menu to select the panel(s) that will serve as your starting patient population. Selecting at least one panel is required before the filter can be saved.
4. Selecting a panel(s) is required to save the filter.
5. Set your status. When building a new filter, it is recommended to set your status to “inactive” for testing purposes. Once tested, it is recommended to move to “Active Public” or “Active Private” defined below.
   - **Inactive:** The filter remains available in Advanced Filter Builder but will not appear elsewhere in the Population Explorer interface.
   - **Active Public:** The filter is available to any user who has access to all included panels. Use this
   - **Active Private:** The filter is available only to the user who created it and will not be visible to other users. It will appear in the panel view menu once activated for the individual user; this is denoted with the hamburger icon.

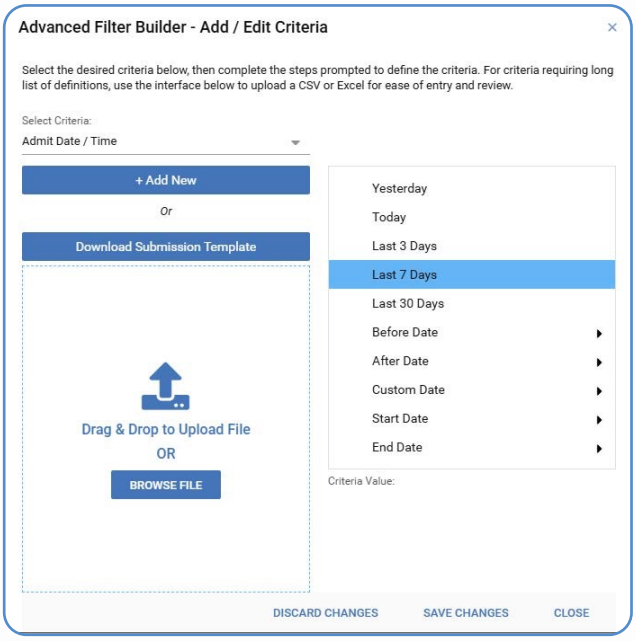
STEP 2

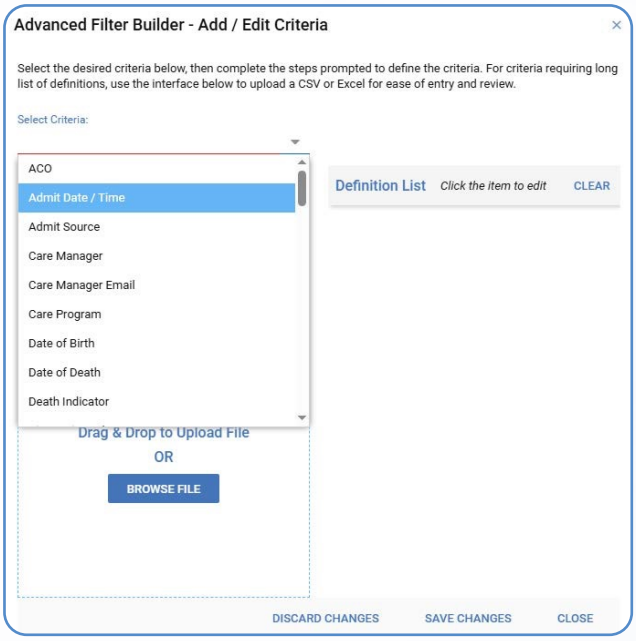
Add any additional criteria needed to further refine your patient population.



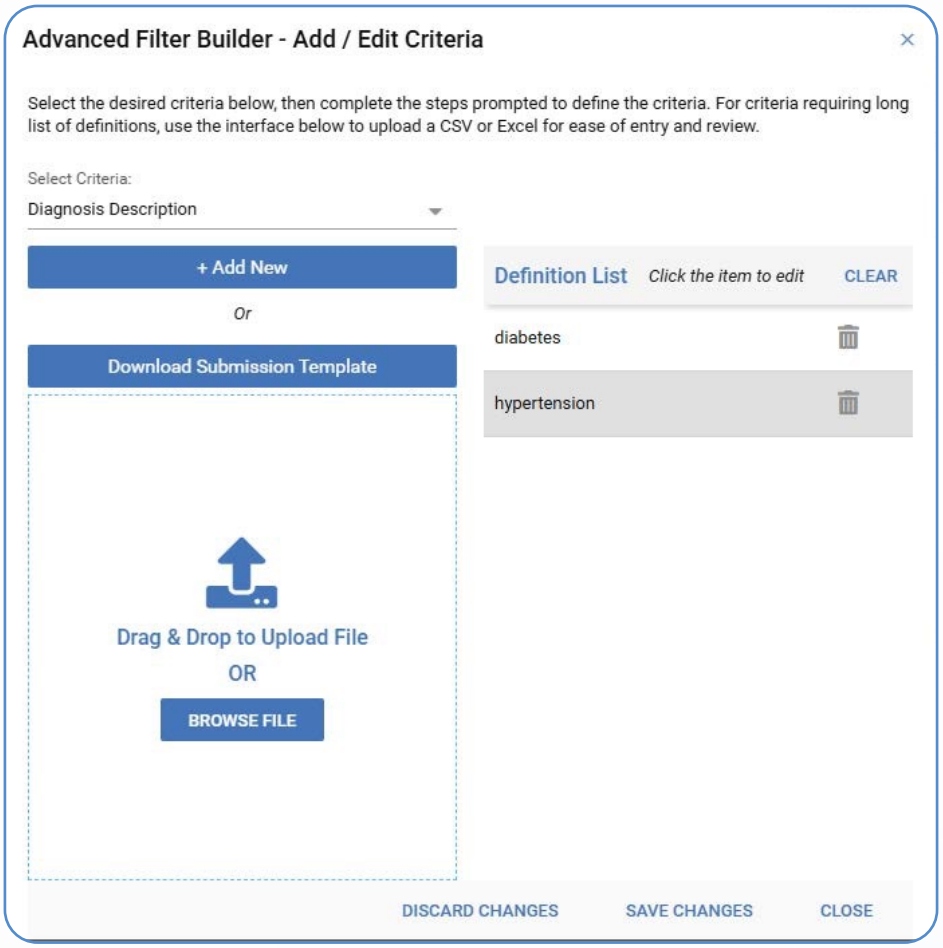
1. Click operator **(AND, OR)**
2. To combine multiple criteria, use **GROUP** to create parentheses and organize your Boolean logic before adding criteria.
3. Click **CRITERIA** on the left-hand menu and select which field you would like to filter on.
4. Click the drop-down arrow under "**Select Criteria**" and scroll down to the criteria you want to select

Once you select which criteria you want to add, if the selection is a list, you will be presented with a list of choices, depending on the data type and options for that criteria:





STEP 3

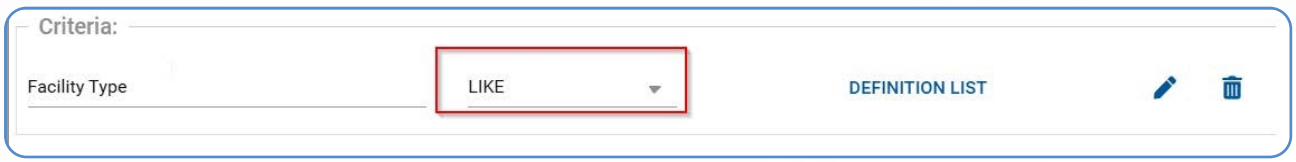


1. Make your selection from the drop-down menu.
2. Click "**Add New.**"
3. Enter your value. Entries are not case-sensitive.
4. If you want to add additional entries, click "**Add New**" and type additional entries.
5. Repeat this process until all desired values have been added.
6. If the criteria selection is not a predefined picklist, you will enter the definition list (what you would like to filter on – see screenshot at right).
7. For large lists of criteria, select **Download Submission Template**, enter one value per row, save the file, and then upload it using **Drag and Drop** or **Browse File**. The Definition List will automatically populate with the uploaded values. This option is particularly useful when working with diagnosis-code lists.

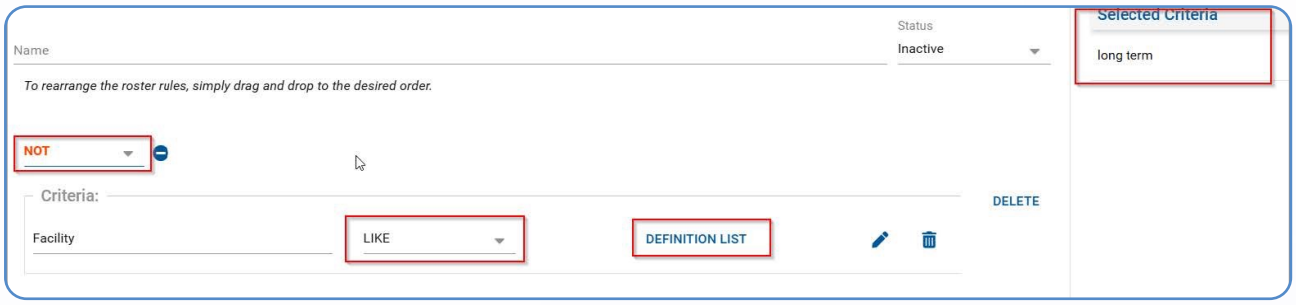
STEP 4

Once you click **"SAVE CHANGES"**, you will be brought back to the Advanced Filter Builder module.

- By default, the operator is set to **IN**, which returns exact matches from the Definition List.
- To search for partial matches rather than exact matches, change the operator from **IN** to **LIKE**.



- To review the values associated with a criterion, select **DEFINITION LIST**. The values will appear on the right side of the screen.
- To Exclude values contained in the definition list, click "**NOT**" before you select your criteria.
- Criteria and operators can be rearranged by dragging and dropping them into the correct spot.



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