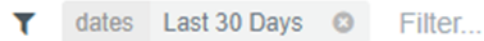




## Clinect Portal Filters

You will find the filter field at the top of most page throughout the various sections of the portal. We typically have a default date filter set to show results for the 'Last 30 days'. If you remove that filter, by clicking on the small 'x' to the right, the data will be updated to reflect results for all time. To add a filter, you will click on the word 'Filter...' and begin typing the filter you wish to add.



### Filter Options

You can filter by Date, Survey Name, Provider, Location, Status, Tag, and/or Person. Some filter options are more useful than others, depending on the section of the portal you are viewing. Recommendations on the portal section(s) best suited for each filter option are included below.

You may apply a single filter or any combination of filters. For example, you can filter by Date, Survey, Provider and Location at the same time. You may also filter by multiple Surveys, Providers, Locations, Statuses, Tags, and/or People at the same time. Just continue to type in the desired filter options.

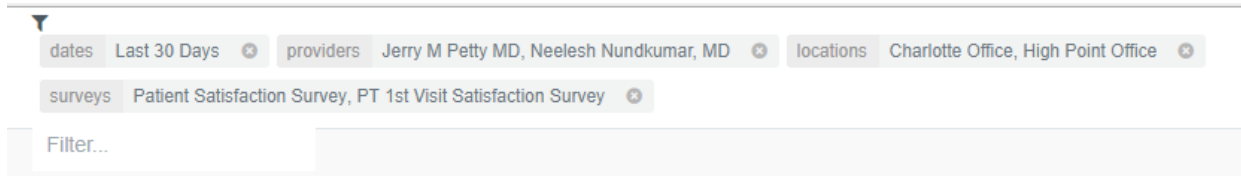
In the example shown below, the data displayed will reflect:

**ONLY** responses from the Patient Satisfaction **AND** PT 1<sup>st</sup> Visit Satisfaction Surveys

That were submitted within the Last 30 Days

For **ONLY** Providers Jerry M Petty MD **AND** Neelesh Nundkumar, MD

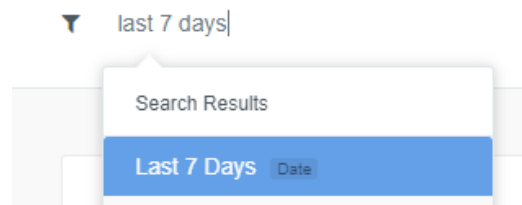
At **ONLY** the Charlotte **AND** High Point Office



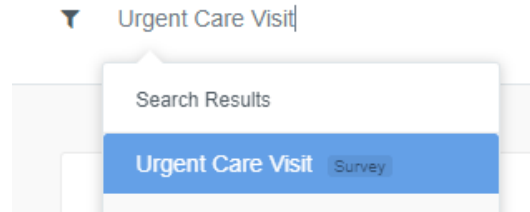
When a filter is added or removed, you will see the data dynamically refresh. Depending on the volume of responses, it may take a few minutes for the updated data to appear.

Filters are 'sticky' and will remain applied throughout the various sections of the portal, until removed by the user or until the portal data is manually refreshed.

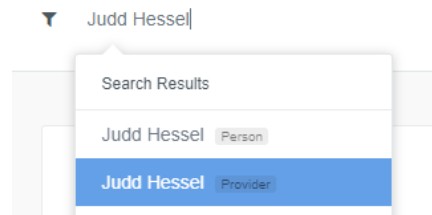
**Date Filter:** This filter can be used with all sections of the portal. Type in any of the following date options (only one Date filter may be applied at a time): 'Today', 'Last 7 Days', 'Last 30 Days', 'Last 60 Days', 'Last 90 Days', 'Previous Quarter', 'Previous Month', 'Previous Year', 'Previous Week', 'This Quarter', 'This Month', 'This Year', 'This Week'



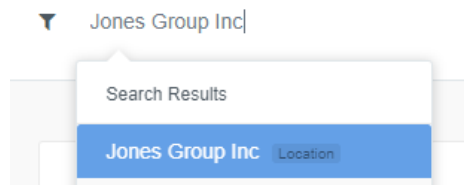
**Survey Filter:** *This filter option is most useful with the Dashboard, Incidents and Responses portal sections.* Type in the name of the survey(s) or type 'survey' if you are unsure of the exact survey names used by your practice. It will have the name of the survey and an identifiable tag such as "the work survey".



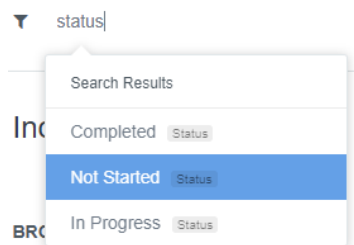
**Provider Filter:** *This filter option can be used with all sections of the portal.* Type in the name of the rendering provider(s). If you filter by multiple providers, it will show you data for all the providers included. In the example below, you will see that the name appears twice. If you want to filter the data by Provider, make sure to select the name that shows 'Provider' (and not 'Person') to the right. We also have the ability to create provider 'groups' that you can filter by.



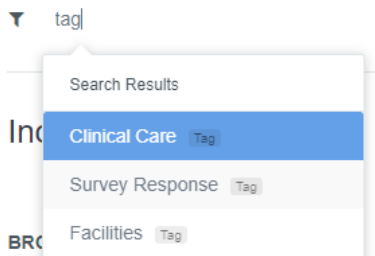
**Location Filter:** *This filter option can be used with all sections of the portal.* Type in the name of the service location(s). If you filter by multiple locations, it will show you data for all the locations included. We also have the ability to create location 'groups' that you can filter by.



**Status Filter:** *This filter option is most useful with the Incidents portal section.* Type in the name of the incident status you want to filter by or type the word 'Status' to display the available options. Custom statuses can be added by request. Most practices start with these three, 'Not Started', 'In Progress', and 'Completed'.



**Tag Filter:** *This filter option is most useful with the Incidents portal section.* Tags are used to categorize incidents. Type in the name of the tag you want to filter by or type the word 'Tag' to display the available options. We start you off with a list of suggested tags, but custom tags may also be added.



**Person Filter:** *This filter option is most useful with the Incidents and Responses portal sections.* You can filter by Person to isolate incidents specific to a patient and/or follower. Followers are users added or assigned to incidents, typically because they should be aware of the incident or possibly act to resolve it. Type in the name or email address of the patient or user/follower to see all the incidents they are included on. For patients, you can also type their Patient ID into the filter field.

