

Filter Report Data

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Add Report Filters

Filters are used to control the information shown when running a report.

- Adding an **ID** field as a filter allows you to check a box and select which of the specified records you would like to include in your report. For example, adding the Provider ID field allows you to select which providers to include in your report.
- Adding a **Text** field as a filter will allow for the result set to be constrained only to those results where the value in the corresponding field matches the text specified in the filter window. Text filters can be applied as exact, partial searches, or between (range between 2 letters).
- Adding a **Numeric** field as a filter will allow for the result set to be constrained only to those results where the value in the corresponding field matches the numeric value specified in the filter window. Numeric filters can be applied using the comparators: equal to, does not equal, greater than, greater than or equal to, less than, less than or equal to or between.
- Adding a **Monetary** field as a filter will allow for the result set to be constrained only to those results where the value in the corresponding field matches the dollar value specified in the filter. Monetary filters can be applied using the comparators: equal to, does not equal, greater than, greater than or equal to, less than, less than or equal to or between.

Follow the steps below to add filters to a report.

1. Select **Reports > Builder**.
2. Use the **Show All** button to view all custom reports. Or use the **Search Bar** to further drill down your search.
3. Select the **Reports** from the list.
4. In the **Report Fields** pane
 1. Expand the **Report Field** category you wish to filter the report off of.
 2. Or use the **Field Search** to search for fields in all categories.

 You can search and filter by a specific field type (Date, ID, Money, Number, Text) by Clicking  and limiting the search to specific report field types.

5. Drag and drop the field into the **Filters** pane.

 The order in which you drop the filters on the pane will not be the order shown for the filters. The last filter dropped will always be highlighted so you can see where it will fall in the filter order.

Static vs. Dynamic Report Filters

Filters can be set as Dynamic or Static. By default, all fields added to the Filters list are set to Dynamic.

- **Dynamic:** These filters are blank within the Filter window at run-time, allowing you to set your desired values prior to running the report.
 - *For example, if you want to see a detailed report of all your insurance payments, a dynamic filter could be used to filter out any payer you do not want to pull into your report.*
- **Static:** These filters contain a predefined value that is used each time the report is run. Static filters are useful in situations where the same filter criteria is applied to a report every time it is run. Rather than having to set the same value for the filter field every time the report is run.
 - *For example, if you want to see a detailed report that always displays information for all claims month date, use the Claim From Date field and specify it as Static with a value of 'This Month'*

Follow the steps to set a field as a Static filter.

1. Select **Reports > Builder**.
2. Use the **Show All** button to view all custom reports. Or use the **Search Bar** to further drill down your search.
3. Select the **Report** from the list.
4. In the **Report Fields** pane
 1. Expand the **Report Field** category you wish to filter the report off of.
 2. Or use the **Field Search** to search for fields in all categories.

 When using the search feature, the Report Fields list will filter fields that have a full or partial match related to the text entered. To refine results simply expand the category folder.

5. Once you've located the field drag and drop the field into the Filters pane.

6. Right click on the field within the **Filters** pane, select **Filter Type: Static**.

 If the Static option is selected for a field, it will display as **Bold** text.

7. A window will open where you can specify the specific filter value that will be applied to the search criteria every time you run the report.
8. Click **Done**.

 You're unable to edit Static filter values directly within the Filter window. The field can be reverted to Dynamic at any time by editing the report in the Report Builder. Right-click on the field within the Filters pane, select Filter Type then Dynamic.

Default Filter Value

A default value can be specified for Dynamic filters. The default value will be automatically populated within the filter when running the report. However, the value can be modified prior to running the report.

Follow the steps below to set a default value for a Dynamic filter.

1. Select **Reports > Builder**.
2. Use the **Show All** button to view all custom reports. Or use the **Search Bar** to further drill down your search.
3. Select the **Report** from the list.
4. In the **Report Fields** pane
 1. Expand the **Report Field** category you wish to filter the report off of.
 2. Or use the **Field Search** to search for fields in all categories.

 When using the search feature, the Report Fields list will filter fields that have a full or partial match related to the text entered. To refine results simply expand the category folder.

5. Drag and drop the field into the **Filters** pane.

6. Right click on the field within the **Filters** pane, select **Set default selections**.
 7. A window will open where you can specify the filter value that will auto-populated in that filter field every time you run the report.
 8. Click **Done**.
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