

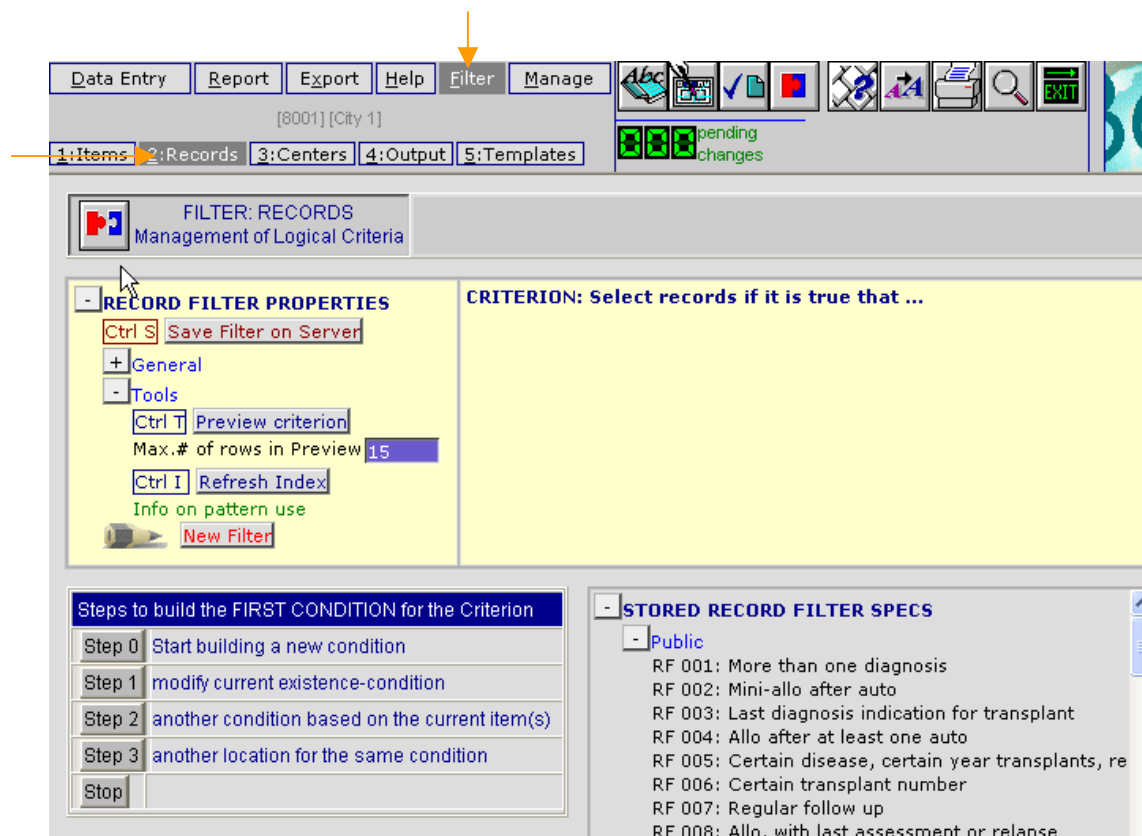
Record filters

Why are they used?

A record filter allows you to retrieve data with restrictions, for example only records that are allograft, or only records that are paediatric acute leukaemias.

How are they used in Promise 2?

Record filters are created separately in the Filter – Records menu

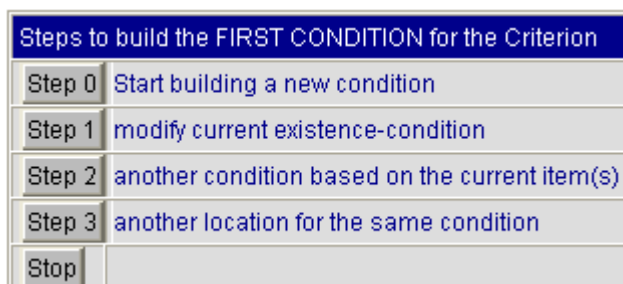


In "Stored Record Filter Specs" you will find a range of pre-programmed filters created by the central office (Public folder) and registries (numbered for example "Reg 8401" to match the membership list CIC codes).

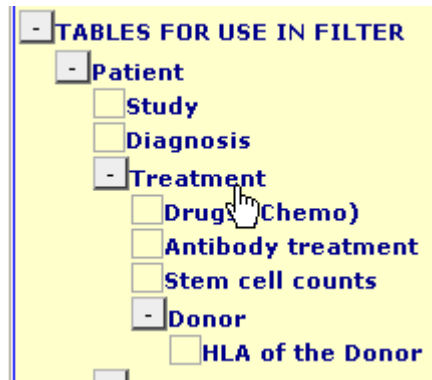
To demonstrate how the filters are created, we will first create two basic filters from scratch:

Example 1: **Allografts only**

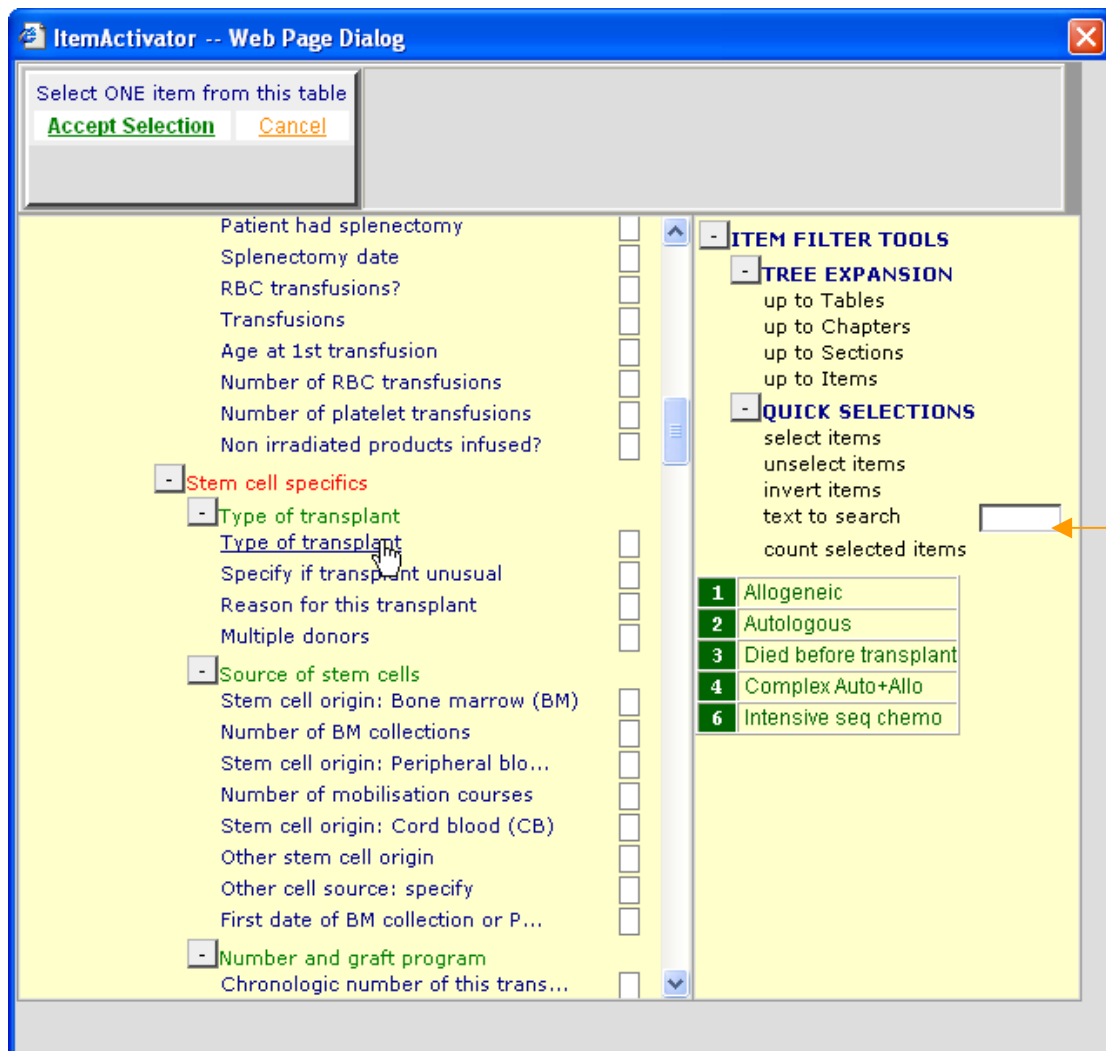
Click on [Step 0] to start building your criteria



The item you need to select from MED-AB is "type of transplant". To choose an item, first click on the table containing your item, in this case Treatment

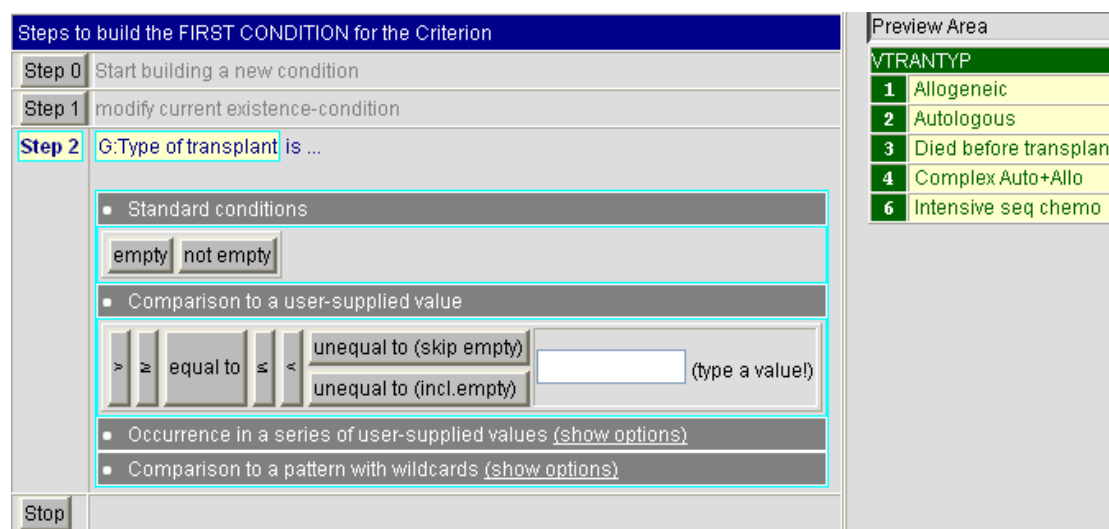


After clicking on the table name the Item Activator screen pops up. Scroll down to the item, or enter a partial item name in 'text to search' to find it quickly:



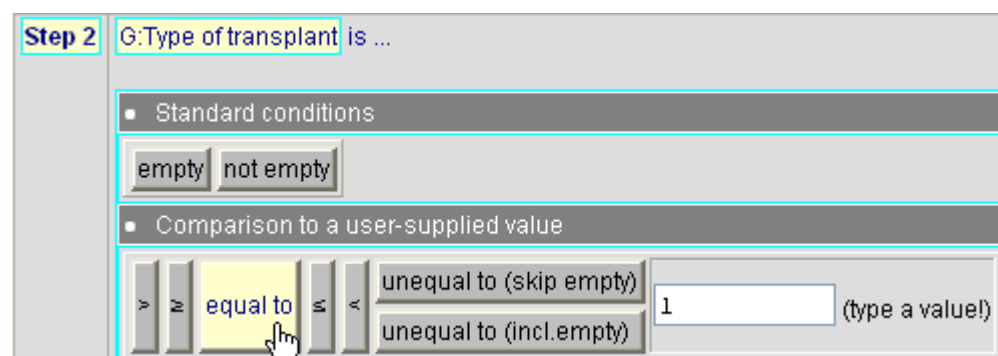
Click on item 'type of transplant' to select it (the blue checkbox indicates that it has been marked). When you mouse over the item you can also check the list of codes and labels, useful for double-checking this is the item you need.

After selecting the item you are taken directly to step 2, where you can enter the criteria:

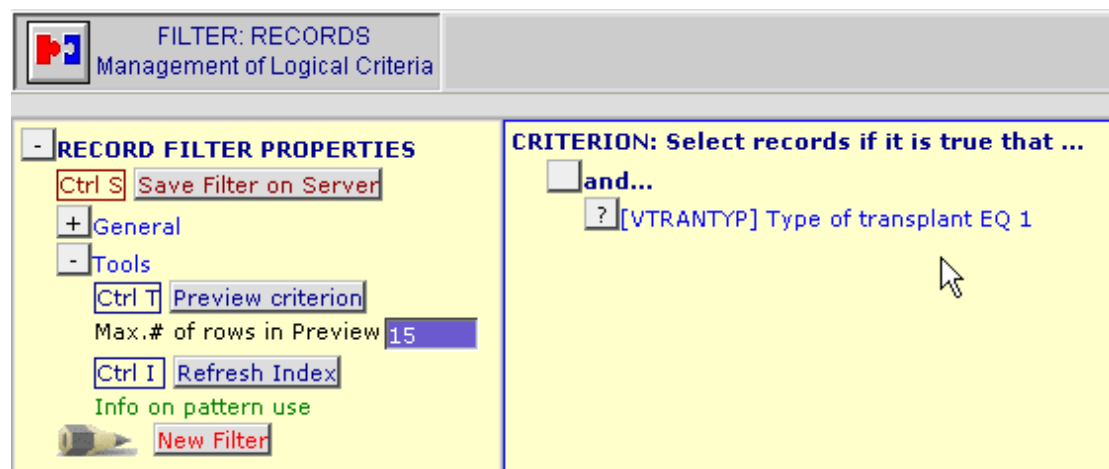


First enter the code for Allogeneic in the input box (the list of codes for your item will be displayed on the right).

For this example, you need to use the [Equal to] button as a comparison. (Type of Transplant equal to 1)



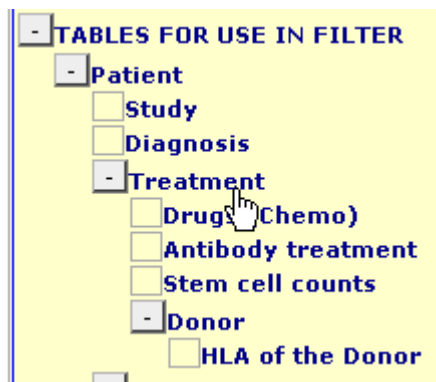
Your criterion will display in the window above:



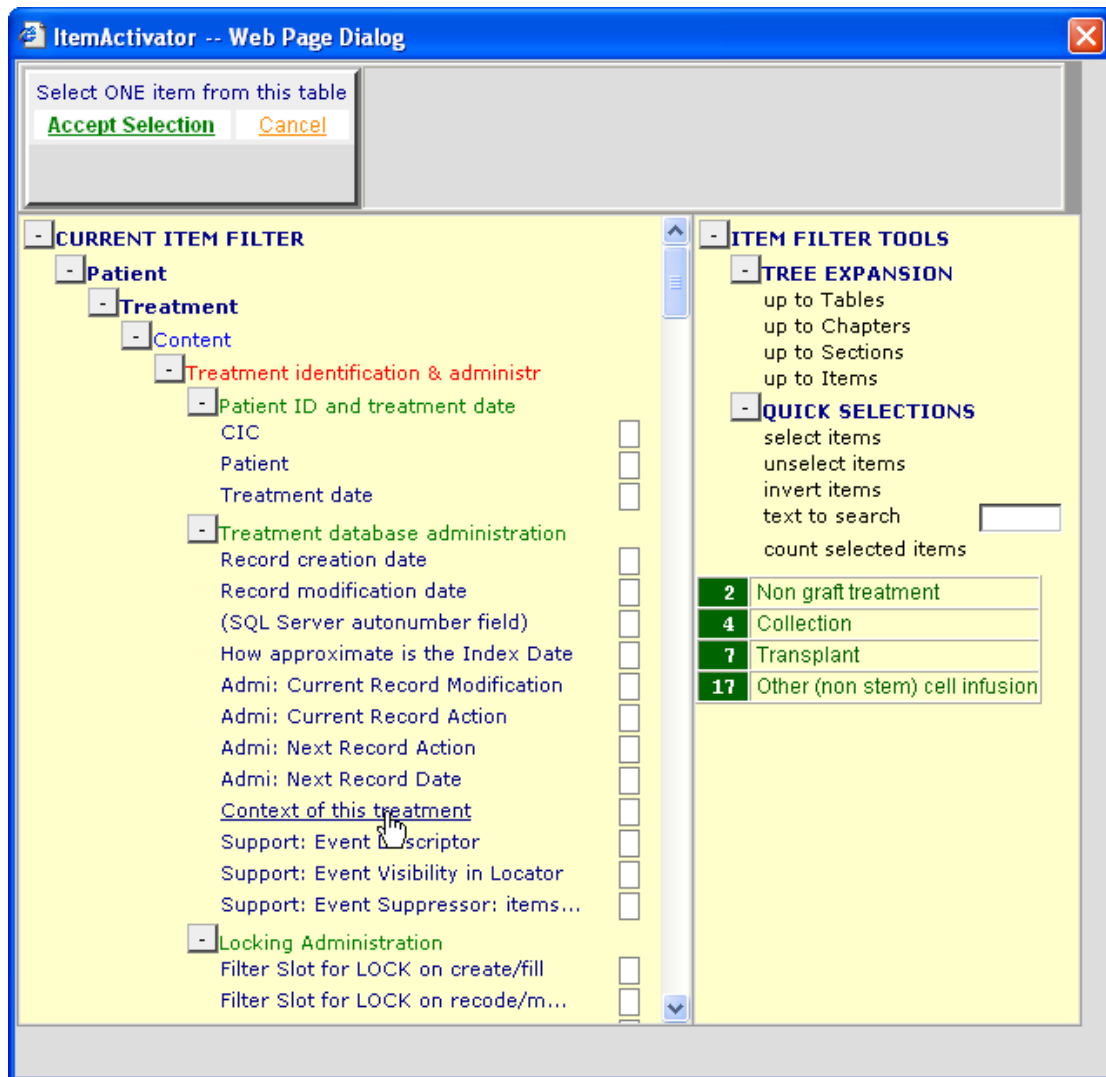
As the label "allogeneic" may refer to a different type of treatment and not just transplant, you will need to add the context in your criteria. The following events are used in the database structure, to put each diagnosis, treatment and assessment into context:

Code	Label
1	Main, graft diagnosis
2	Non graft treatment
3	Alive
4	Collection
5	Worst disease status
6	Staging
7	Transplant
8	Myelosuppression
9	GvHD
10	Relapse/progression
11	Dead
12	Study entry
13	Complication
15	Complete remission
16	Other, non graft diagnosis
17	Other (non stem) cell infusion

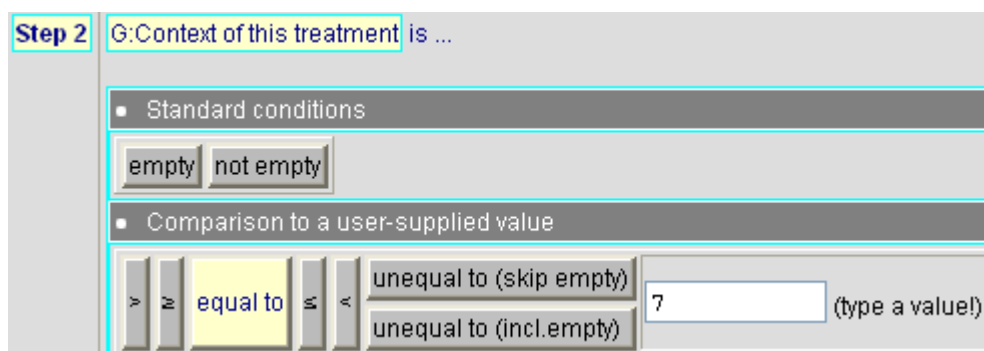
To add the context "Transplant" return to step 0 and select the treatment table:



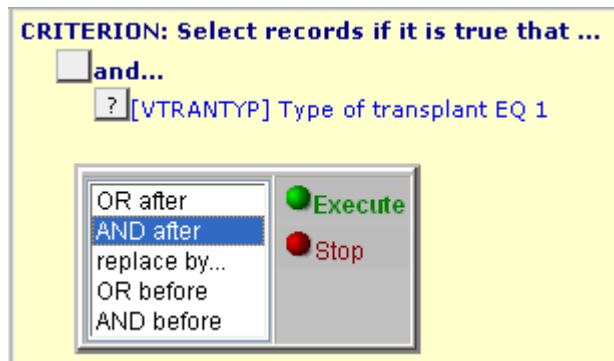
Click on item 'Context of this treatment' to select it (the blue checkbox indicates that it has been marked). When you mouse over the item you can also check the list of codes and labels, useful for double-checking this is the item you need.



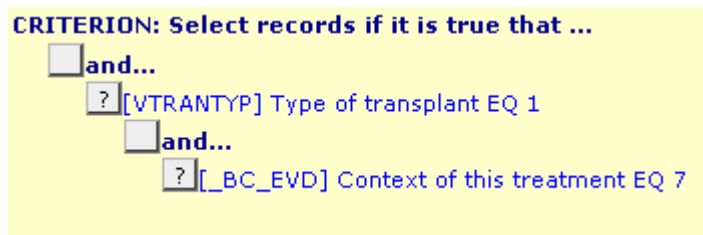
After selecting the item you are taken directly to step 2, where you can enter the criteria – code 7 = Transplant (SCT). Context of this treatment is equal to 7:



To add it, click back on the previous criterion and select "AND after":



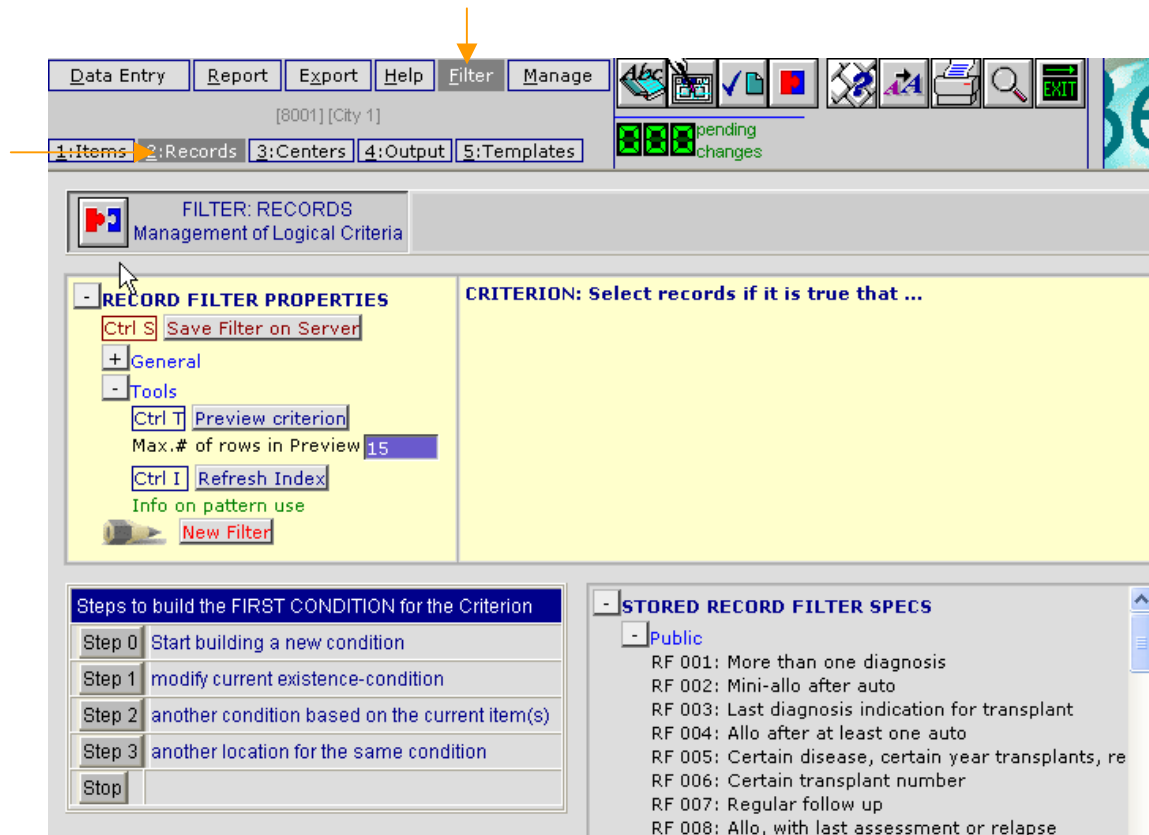
This will combine both of your criteria:



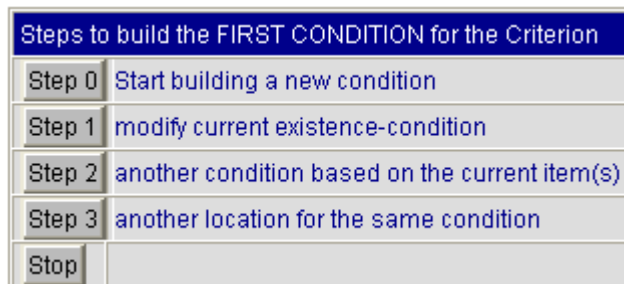
You can now save your complete filter for future use by pressing [Ctrl-S] or the [Save Filter on Server] button. Give it a title and press [ok]. You can retrieve saved filters in the Stored Record Filter Specs (step 0), they will be saved in your Private folder.

Example 2: **Paediatric Acute Leukaemias**

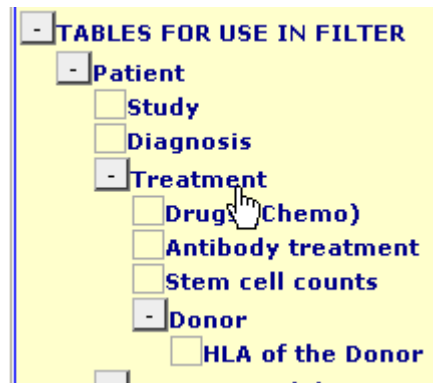
Filter – Records menu



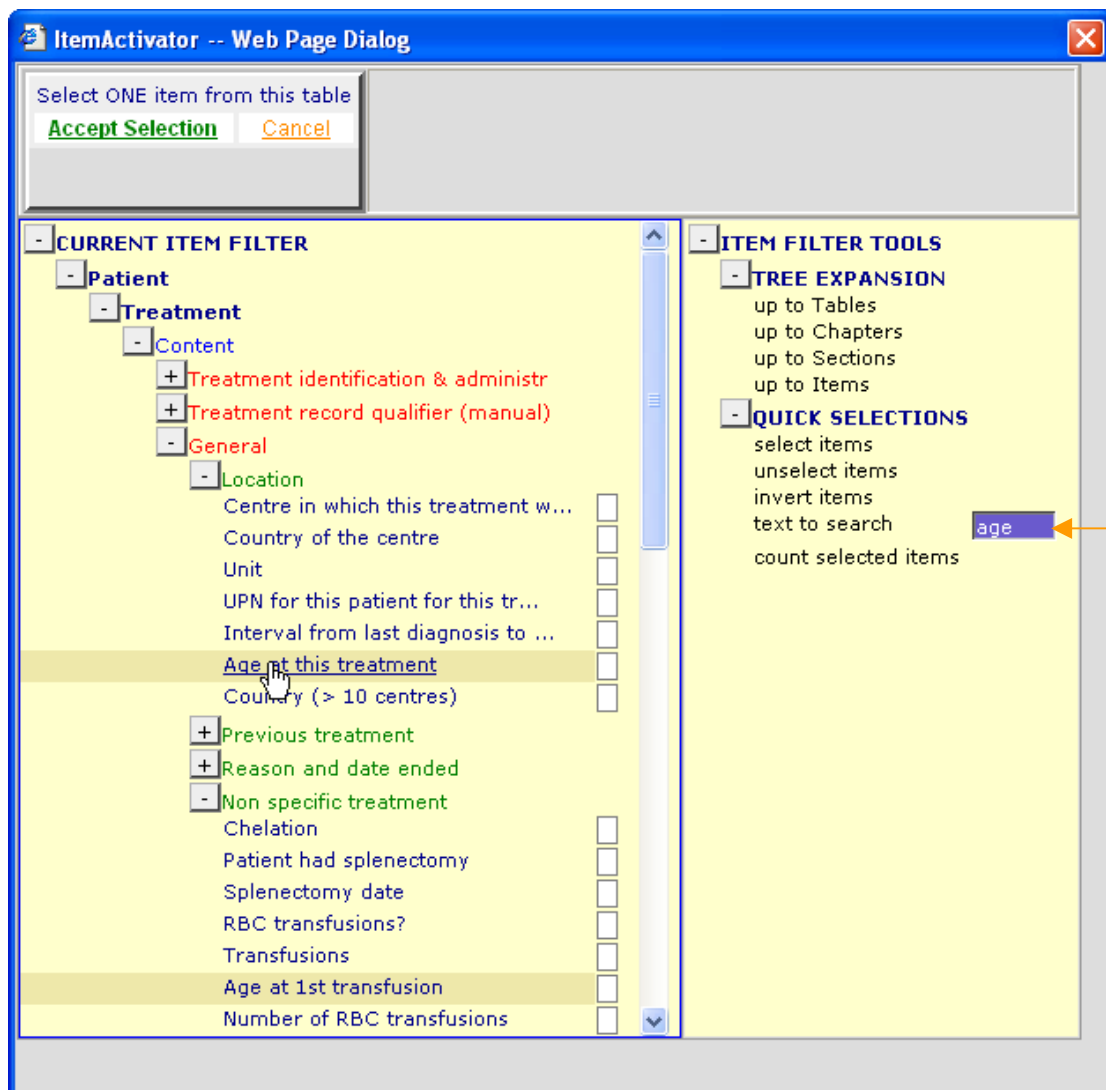
Click on [Step 0] to start building your criteria



The items you need to select from MED-AB are "age at this treatment"; "context of this treatment", "main diagnosis" and "type of diagnosis". To choose the item, first click on the table containing your item, for example "age at this treatment" in Treatment

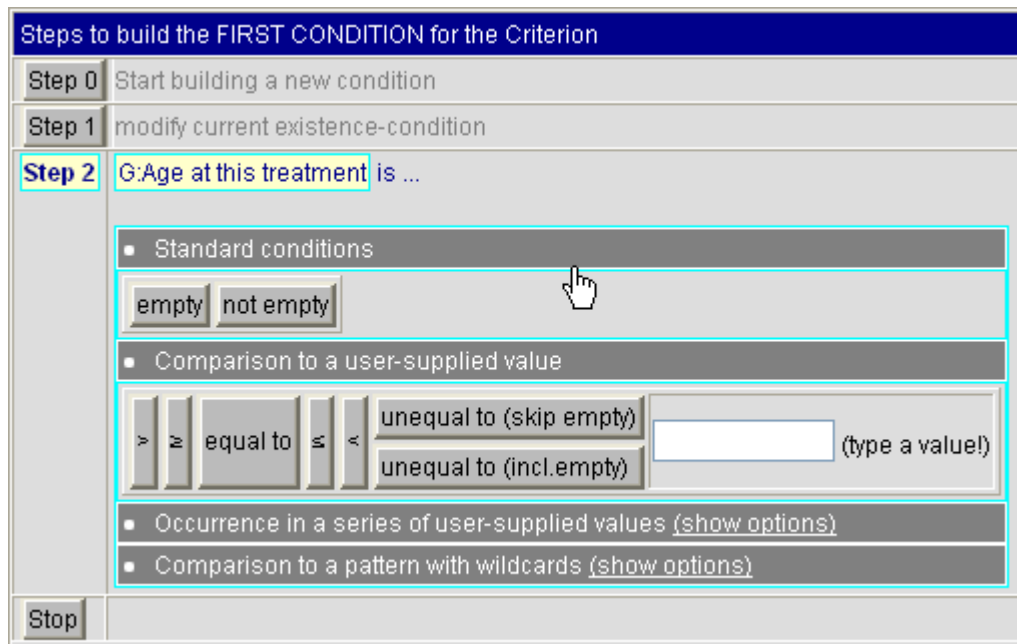


After clicking on the table name the Item Activator screen pops up. Scroll down to the item, or enter a partial item name in 'text to search' to find it quickly:



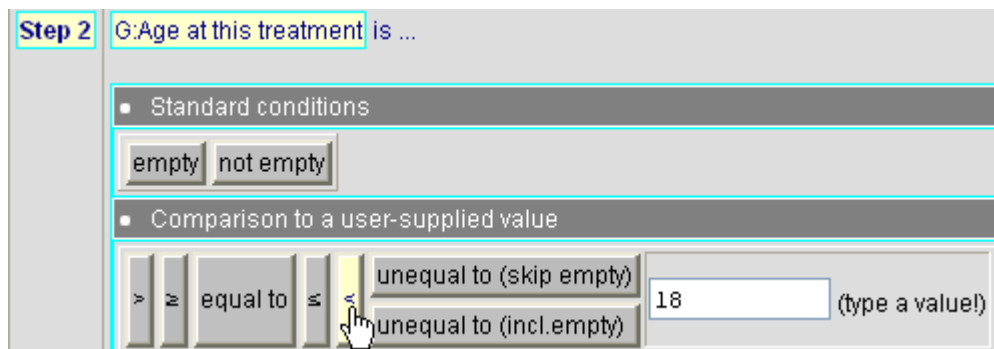
Click on item 'Age at this treatment' to select it (the blue checkbox indicates that it has been marked). Note that this item can have so many combinations, so it is an uncoded item; no list of codes/labels will appear).

After selecting the item you are taken directly to step 2, where you can enter the criteria:

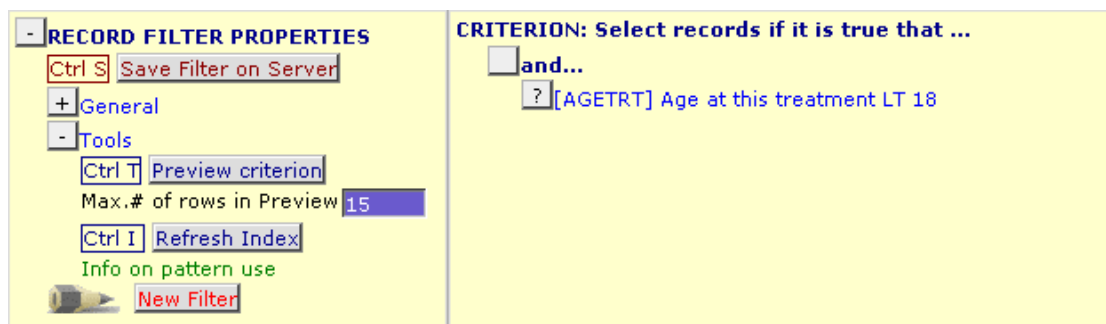


First enter the age restriction in the input box (no list of codes for your item will be displayed on the right because this is not a coded item).

For this example, if you need to extract records for all paediatric patients aged under 18, you need to use the [$<$] button as a comparison. (Age at this treatment $<$ 18)



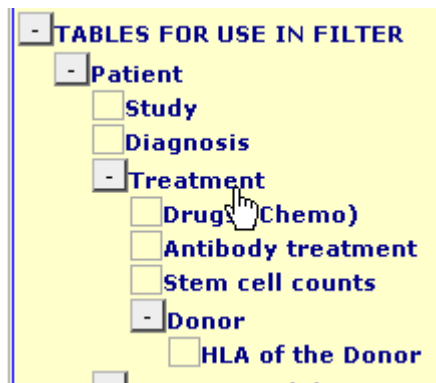
Your criterion will display in the window above:



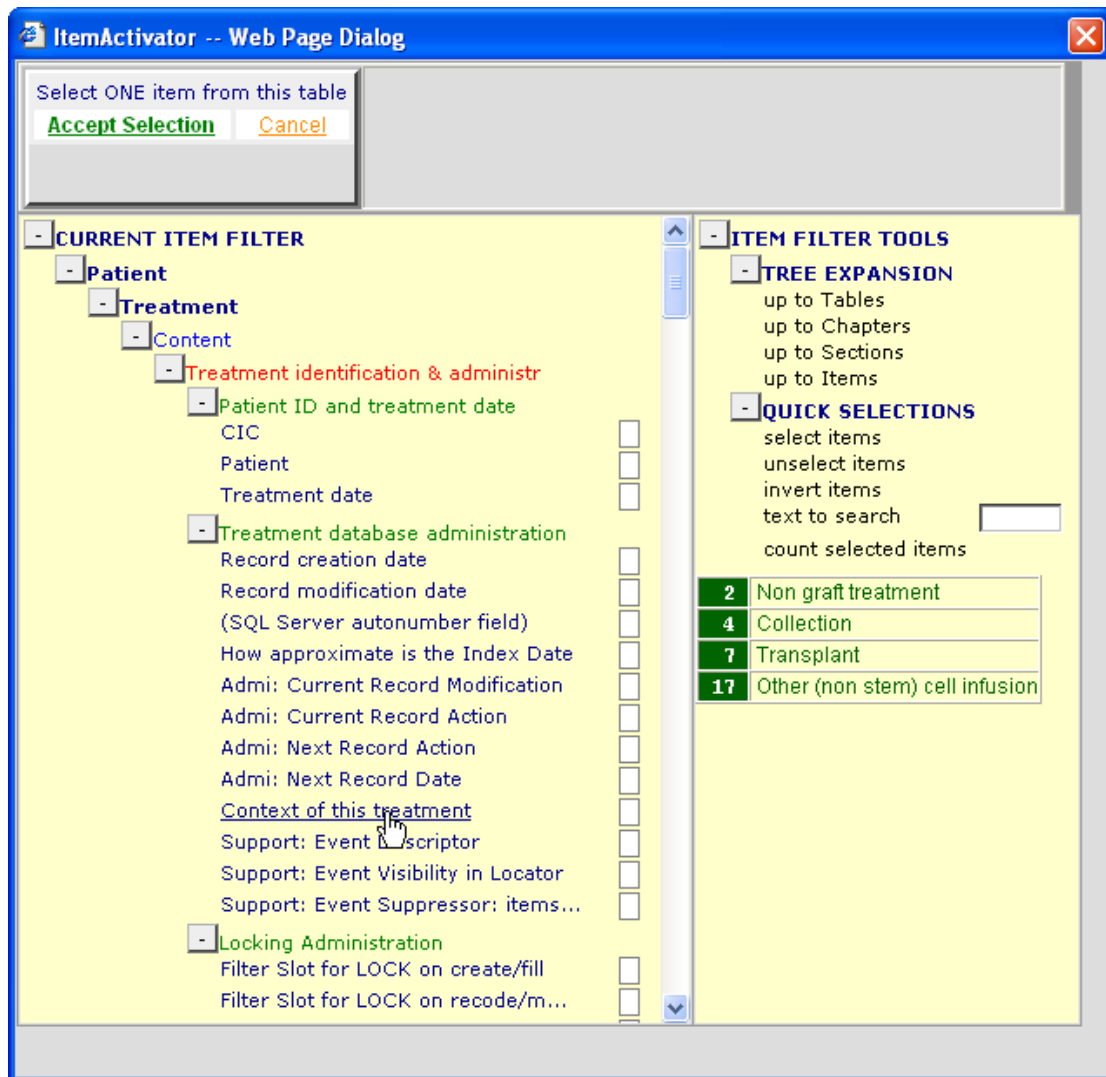
Next you can add the remaining part of your criteria. As the "age at this treatment" can refer to any treatment and not just transplant, you will need to add the context in your criteria. The following events are used in the database structure, to put each diagnosis, treatment and assessment into context:

Code	Label
1	Main, graft diagnosis
2	Non graft treatment
3	Alive
4	Collection
5	Worst disease status
6	Staging
7	Transplant
8	Myelosuppression
9	GvHD
10	Relapse/progression
11	Dead
12	Study entry
13	Complication
15	Complete remission
16	Other, non graft diagnosis
17	Other (non stem) cell infusion

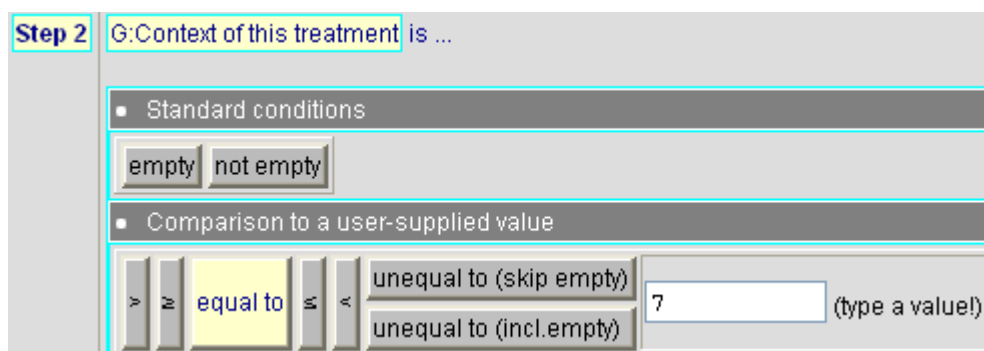
To add the context "Transplant" return to step 0 and select the treatment table:



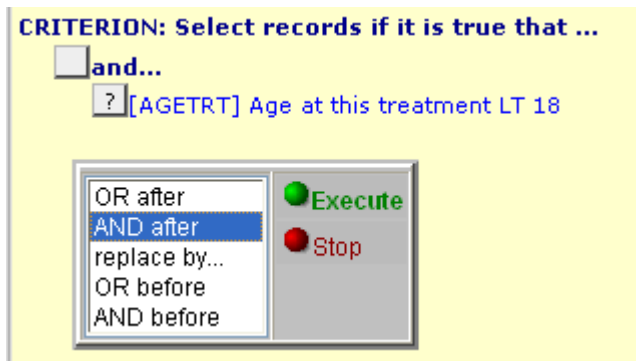
Click on item 'Context of this treatment' to select it (the blue checkbox indicates that it has been marked). When you mouse over the item you can also check the list of codes and labels, useful for double-checking this is the item you need.



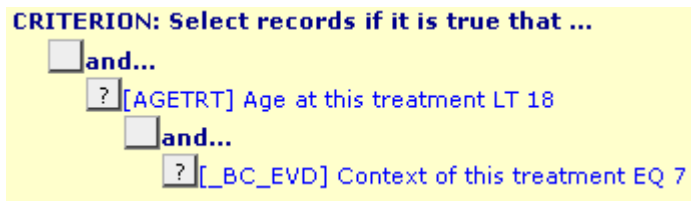
After selecting the item you are taken directly to step 2, where you can enter the criteria – code 7 = Transplant (SCT). Context of this treatment is equal to 7:



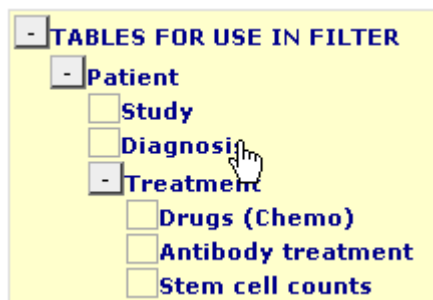
To add it, click back on the previous criterion and select "AND after":



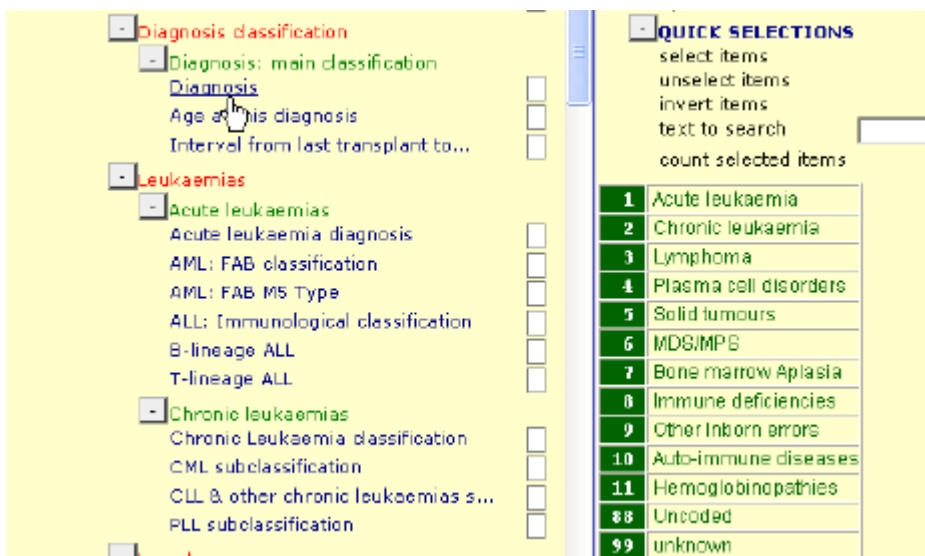
This will combine both of your criteria:



Following this you need to add the additional criteria "main diagnosis = acute leukaemia". Return to step 0 and select the Diagnosis table:



Click on item 'Diagnosis' to select it (the blue checkbox indicates that it has been marked). When you mouse over the item you can also check the list of codes and labels, useful for double-checking this is the item you need.



Enter the code for Acute Leukaemia in the input box (the list of codes for your item will be displayed on the right).

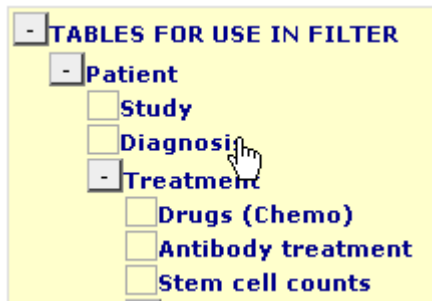
For this example, you need to use the [Equal to] button as a comparison. (Main diagnosis equal to 1)

To add it, click back on the previous criterion and select "AND after":

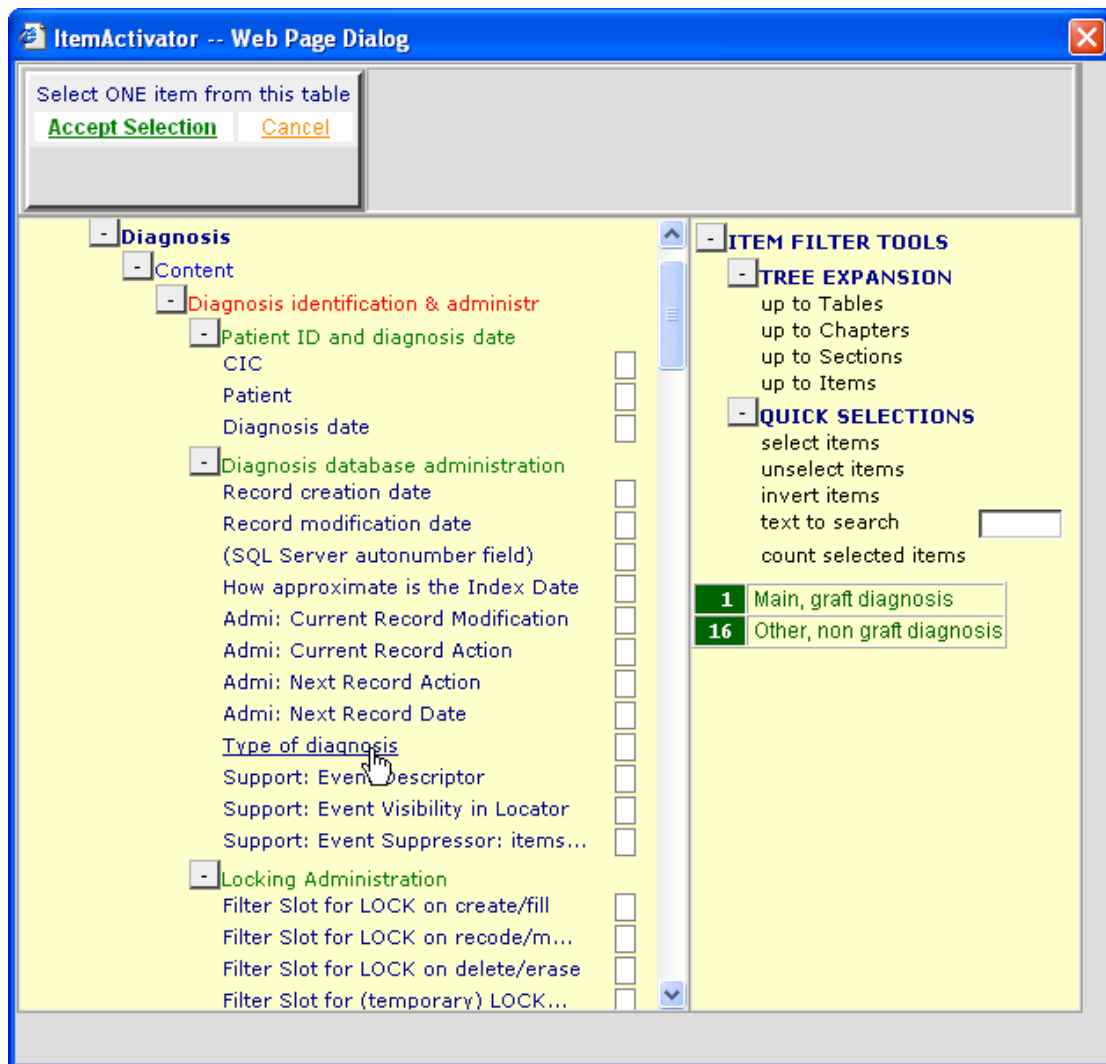
This will combine your 3 criteria:

Finally you need to add the remaining part of your criteria. As the "diagnosis" can refer to any diagnosis and not just the main graft diagnosis, you will need to add the context in your criteria (with reference to the list of events previously described).

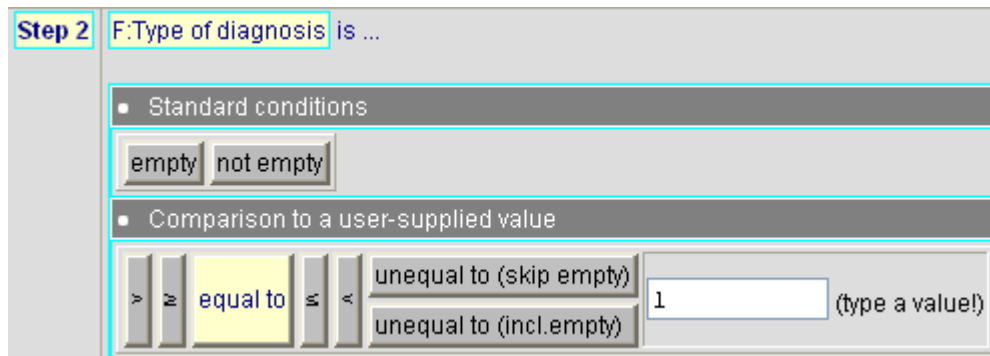
To add the context "main, graft diagnosis" return to step 0 and select the Diagnosis table:



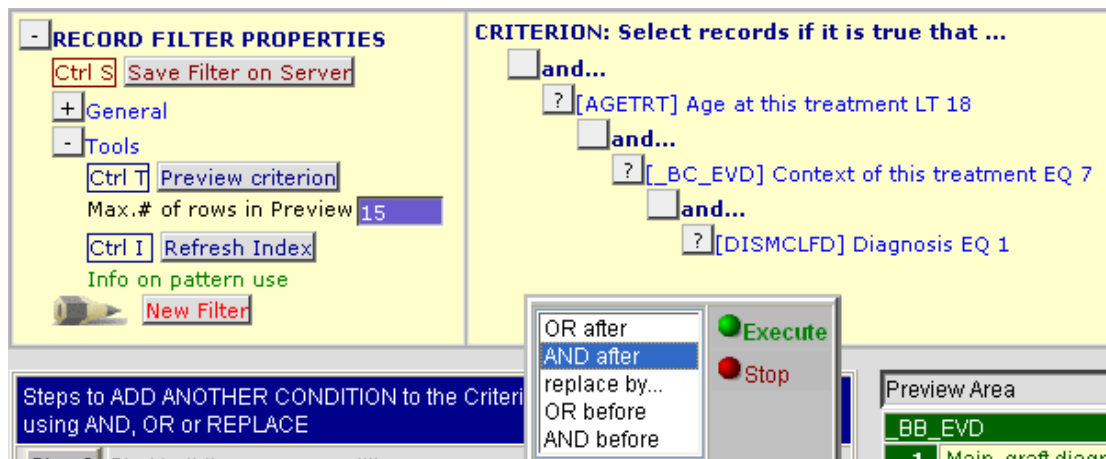
Click on item 'Type of diagnosis' to select it (the blue checkmark indicates that it has been marked). When you mouse over the item you can also check the list of codes and labels, useful for double-checking this is the item you need.



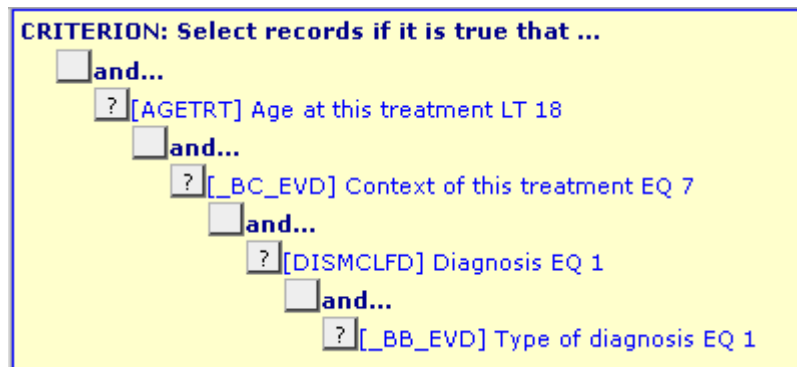
Enter the code for main graft diagnosis and select [equal to]. (Type of Diagnosis equal to 1)



To add this to your criteria, click on the previous criterion and select "AND after":



Your final criterion will appear like this:



You can now save your complete filter for future use by pressing [Ctrl-S] or the [Save Filter on Server] button. Give it a title and press [ok]. You can retrieve saved filters in the Stored Record Filter Specs (step 0), they will be saved in the Private folder.

Use of a Record Filter in the Data Entry Index

Record filters can be used to reduce your index in Data Entry, for example if there is an occasion when you need to look at paediatric acute leukaemia patients only.

Using example 2 in the previous section, if you have this currently loaded in the Filter – Records screen, you can switch to menu Data Entry – Index and apply the same filter.

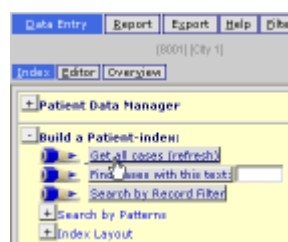
Switch to tab Data Entry – Index

In “Build a Patient-index” click on [Search by Record filter]. (When you mouse over this button you can check the record filter that will be applied).

Below you can see that the index has been reduced to paediatric acute leukaemias only, and the middle tab has changed to [Found cases: 68 out of 74]. (68 patients/74 transplants).

Using a record filter in the Index is also a good way of testing out a record filter before you use it in another type of report, such as a listing, frequency or export.

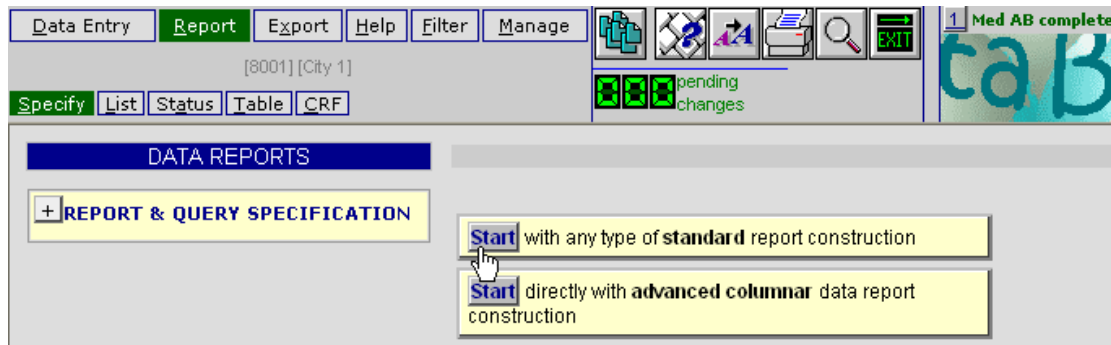
If you need to switch back to your full index again, click on “Get all cases: refresh”:



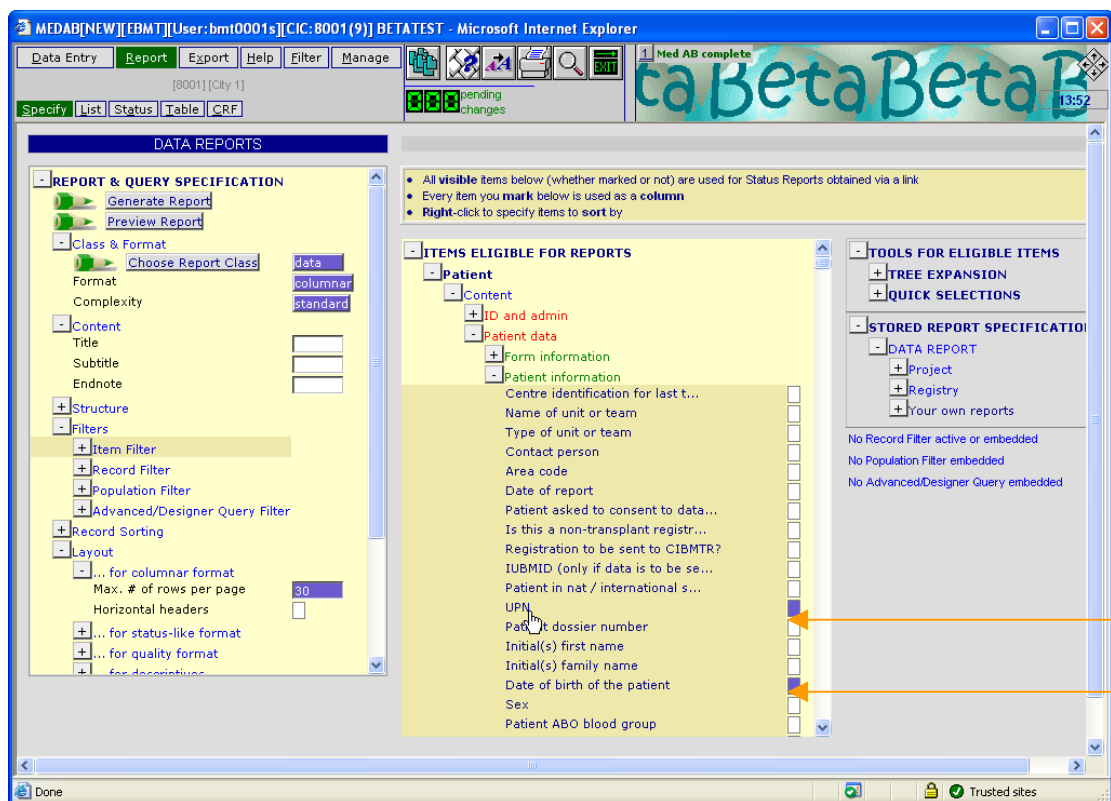
Use of a Record Filter in a Columnar List

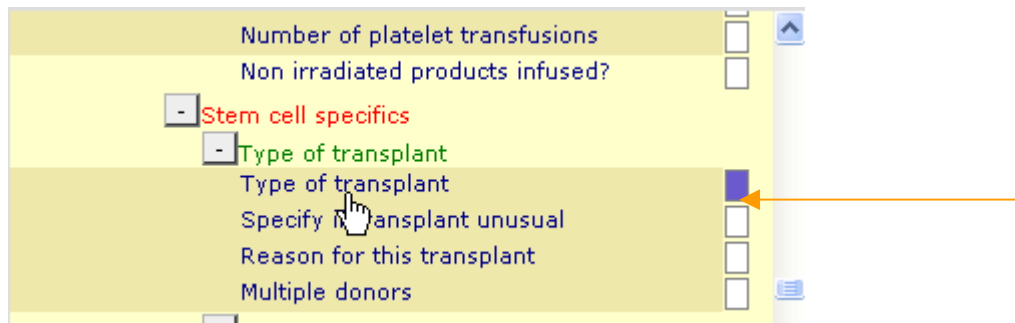
A record filter can also be applied to a columnar list. Take for example, the record filter "Allografts only" described on page 1.

To create a simple columnar list, go to menu Report – Specify. The first time you visit this menu in a Promise session, you will be asked to select Standard or Advanced report mode. For this example select [Standard]:



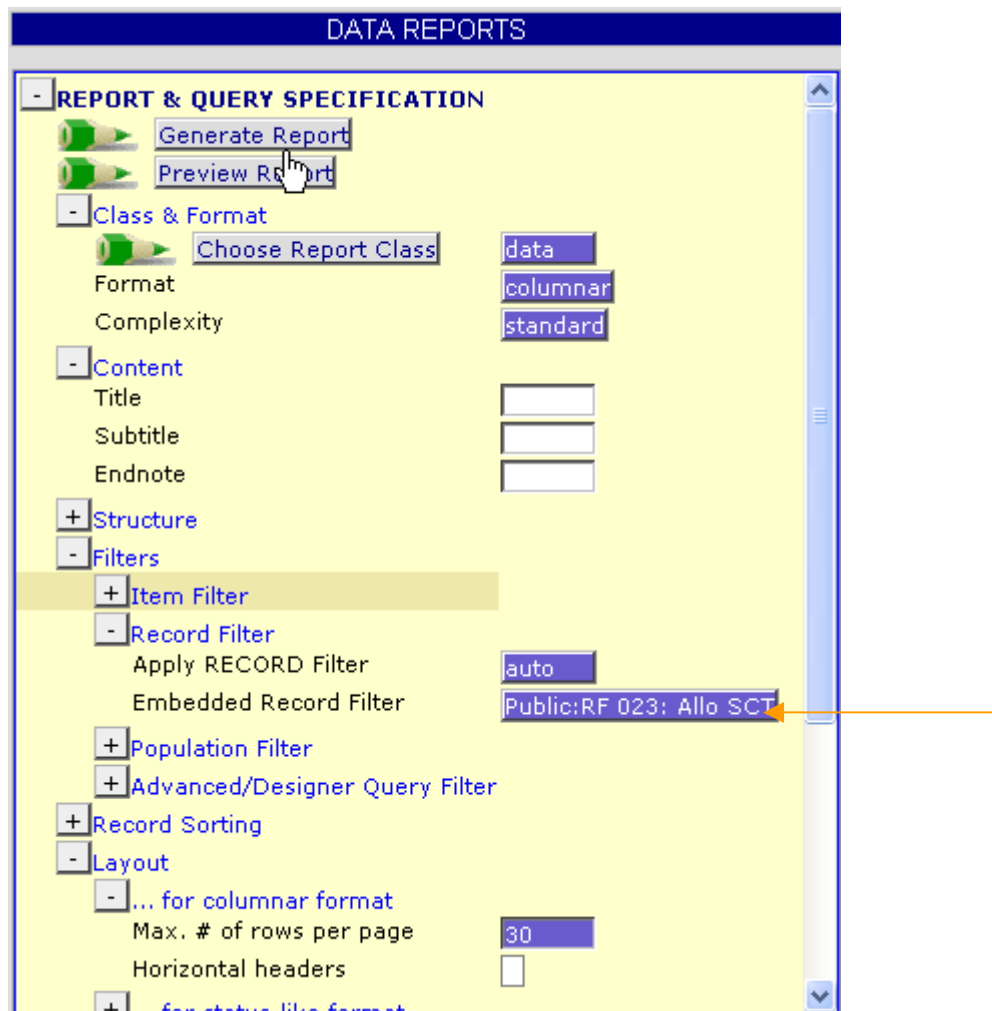
In the specification screen, select a few items, for example, Unique Patient Number (UPN) and Date of birth and Type of Transplant:





You can apply a record filter that you saved previously in the folder named Filters – Record Filter. Click on Embedded Record Filter and select one from the drop-down list. In this example we can use an Allografts only filter. Select the query you saved earlier or use the pre-programmed public filter named [Public: RF 023: Allo SCT]:

To run your report click [Generate Report]:



You will notice in the results that only allografts (type of transplant: code 1) are in your list:

MARK:	CIC	Patient	UPN	Date of birth of the patient	Treatment date	Type of transplant
	9	27		1960/12/15	2001/05/05 00:00:00	1
	9	28	h254+8+30	1972/03/12	2003/12/12 00:00:00	1
	9	50	1	1999/09/09	2001/01/01 00:00:00	1
	9	50	1	1999/09/09	2005/05/12 00:00:00	1
	9	51		1951/04/07	2003/06/07 00:00:00	1
	9	208	1110431	1968/01/01	1999/12/30 00:00:00	1
	9	209	567	1976/05/12	2003/11/20 00:00:00	1
	9	292	11234	1969/01/01	2004/01/02 00:00:00	1
	9	1236	9700099	1966/11/28	2003/01/09 00:00:00	1
	9	1237	161263234		2002/01/01 00:00:00	1
	9	8006	AF3614	1964/10/10	2002/04/26 00:00:00	1
	9	8007	567	1960/04/11	2003/05/28 00:00:00	1
	9	9198			2000/01/01 00:00:00	1
	9	9998	1358+689	1960/04/12	2003/08/23 00:00:00	1

In Display Options you can press the [codes:labels] button or shortcut Ctrl-Alt-L to switch between codes and labels:

- Display Options
Ctrl Alt L Codes:Labels
+ Output Table

+ Patient Data Manager

+ ADDITIONAL PAGES

MARK:	CIC	Patient	UPN	Date of birth of the patient	Treatment date	Type of transplant
	9	27		1960/12/15	2001/05/05	Allogeneic
	9	28	h254+8+30	1972/03/12	2003/12/12	Allogeneic
	9	50	1	1999/09/09	2001/01/01	Allogeneic
	9	50	1	1999/09/09	2005/05/12	Allogeneic
	9	51		1951/04/07	2003/06/07	Allogeneic
	9	208	1110431	1968/01/01	1999/12/30	Allogeneic
	9	209	567	1976/05/12	2003/11/20	Allogeneic
	9	292	11234	1969/01/01	2004/01/02	Allogeneic
	9	1236	9700099	1966/11/28	2003/01/09	Allogeneic
	9	1237	161263234		2002/01/01	Allogeneic
	9	8006	AF3614	1964/10/10	2002/04/26	Allogeneic
	9	8007	567	1960/04/11	2003/05/28	Allogeneic
	9	9198			2000/01/01	Allogeneic
	9	9998	1358+689	1960/04/12	2003/08/23	Allogeneic

Difference in Population and Record Filters

A population filter can select a patient population that is entirely independent of the record filter. For example: in a Record Filter you can specify that you wish to retrieve only allograft transplant records. You may wish to view data on these patients autologous transplants too, but the Record Filter will have excluded these data since you specifically requested type of transplant: allogeneic.

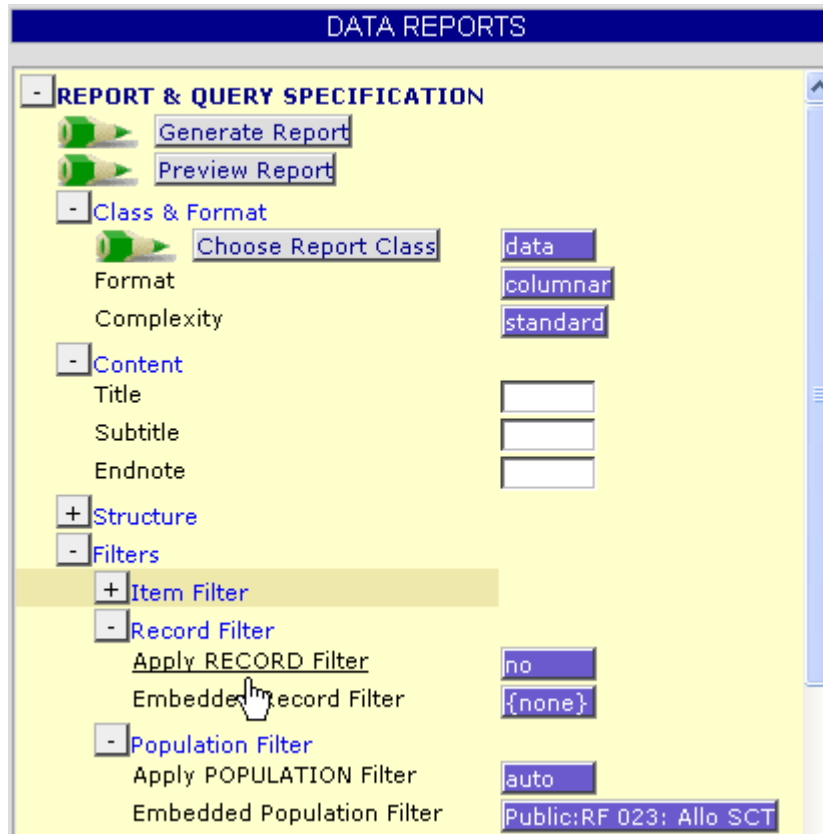
In this case, if you want to have access to all transplants for this patient, including any autografts before or after their allograft, you can use a Population Filter. This will allow you to select all patients with allos, but still allows you to view all transplant records for those patients.

Population filters are created in exactly the same way as Record Filters, using the Filter – Records screen.

Example Population filter for allograft patients (RF 023 loaded from the Public folder):

The screenshot displays the 'Filter - Records' screen in ProMISe 2. The interface includes a menu bar (Data Entry, Report, Export, Help, Filter, Manage), a toolbar with various icons, and a main window divided into several panes. The top pane shows 'RECORD FILTER PROPERTIES' with options like 'Save Filter on Server', 'General' (storage slot, application type), and 'Tools' (Preview criterion, Refresh Index). The middle pane shows the 'CRITERION: Select records if it is true that ...' with a logical expression: '[VTRANTYP] Type of transplant EQ 1 and... [_BC_EVD] Context of this treatment EQ 7'. The bottom-left pane contains 'Steps to ADD ANOTHER CONDITION to the Criterion using AND, OR or REPLACE' with steps 0-3. The bottom-right pane shows a list of 'STORED RECORD FILTER SPECS' including 'Public' and various RF filters, with RF 023 'Allo SCT' highlighted by an orange arrow.

You can switch back to Report – Specify to apply the current filter (in this example as a Population Filter). If you still have filter RF 023 loaded as a Record filter, change this to 'none'. In the Population filter section click on "Embedded Population filter" and select RF023 from the drop-down list.



Check that you still have the 3 items selected, as per report "Record Filter in a Columnar List" on page 17. Click [Generate Report] again to compare the new results with a Population filter applied:

MARK:	CIC	Patient	UPN	Date of birth of the patient	Treatment date	Type of transplant
	9	27		1960/12/15	2001/05/05	Allogeneic
	9	28	h254+8+30	1972/03/12	2003/12/12	Allogeneic
	9	28	h254+8+30	1972/03/12	2005/01/26	Autologous
	9	50	1	1999/09/09	2001/01/01	Allogeneic
	9	50	1	1999/09/09	2005/05/12	Allogeneic
	9	51		1951/04/07	2003/06/07	Allogeneic
	9	208	1110431	1968/01/01	1999/12/30	Allogeneic
	9	209	567	1976/05/12	2003/11/20	Allogeneic

(Note that patient 9-28 also had an autologous transplant that appears with the population filter applied, but this did not display when a record filter was applied).