



Sara Alert TM
Secure monitoring and reporting for public health

User Guide for Enrollers

Software Version 1.14
October 13, 2020

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1 ABOUT SARA ALERT™

Sara Alert™ serves as a force multiplier that supports governmental public health response to emerging disease threats, including active monitoring of home quarantine and isolation for disease containment or mitigation. This open source tool allows public health resources to be directed where they are most needed.

Sara Alert™ enables public health officials to enroll individuals at risk of developing a disease of interest (“monitorees”), for example COVID-19. Once enrolled, individuals can report their (and their household members’, if applicable) symptoms daily through multiple platforms (e.g., mobile, desktop, text-based, voice), providing public health departments improved situational awareness. If a monitoree reports any symptoms or does not submit a daily report, the record is flagged by the system so that public health can quickly and efficiently identify monitorees requiring follow-up for care coordination or non-response follow-up.

Sara Alert™ also enables public health officials to enroll cases who require monitoring to determine when it is safe to discontinue home isolation. Once enrolled, individuals can report their symptoms daily through multiple platforms (e.g., mobile, desktop, text-based, voice), providing public health departments improved situational awareness. If a monitoree reports meets a recovery definition or does not submit a daily report, the record is flagged by the system so that public health can quickly and efficiently identify monitorees requiring follow-up to verify that it is safe to discontinue home isolation or non-response follow-up. The concept of operations and high-level workflow are shown below in **Figure 1**.

1.1 Concept of Operations

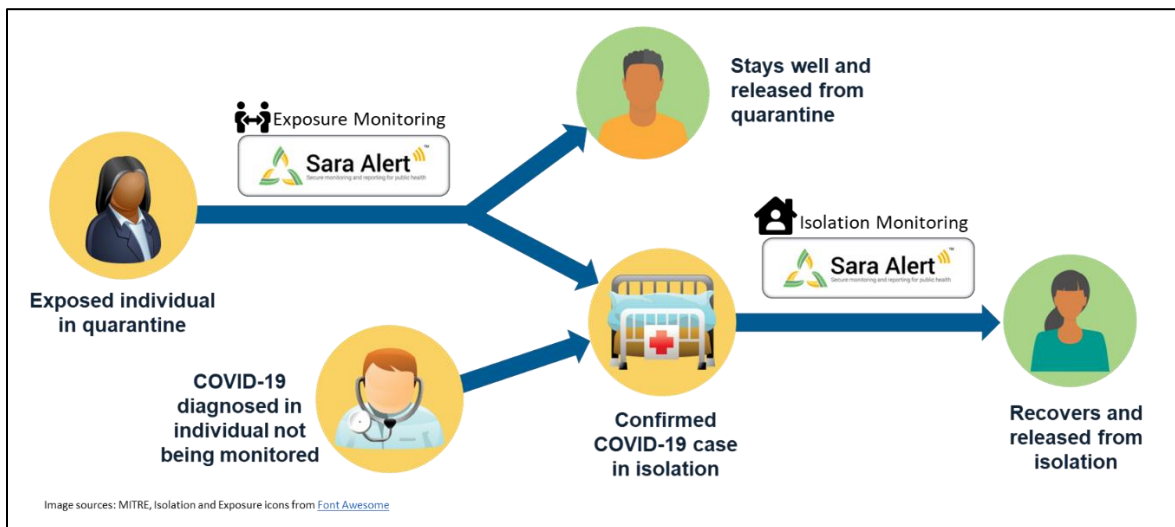


Figure 1: Sara Alert™ Concept of Operations

1.2 Workflow Summary

The Sara Alert™ system contains two parallel public health workflows that track two types of monitorees:

- **Exposure Monitoring Workflow:** allows public health to monitor **potentially exposed** individuals to determine if they become ill; for COVID-19 the monitoring period is 14 days after the last day of exposure.
- **Isolation Monitoring Workflow:** allows public health to monitor **confirmed cases** daily to determine when they preliminarily meet the recovery definition and it may be safe to discontinue home isolation.

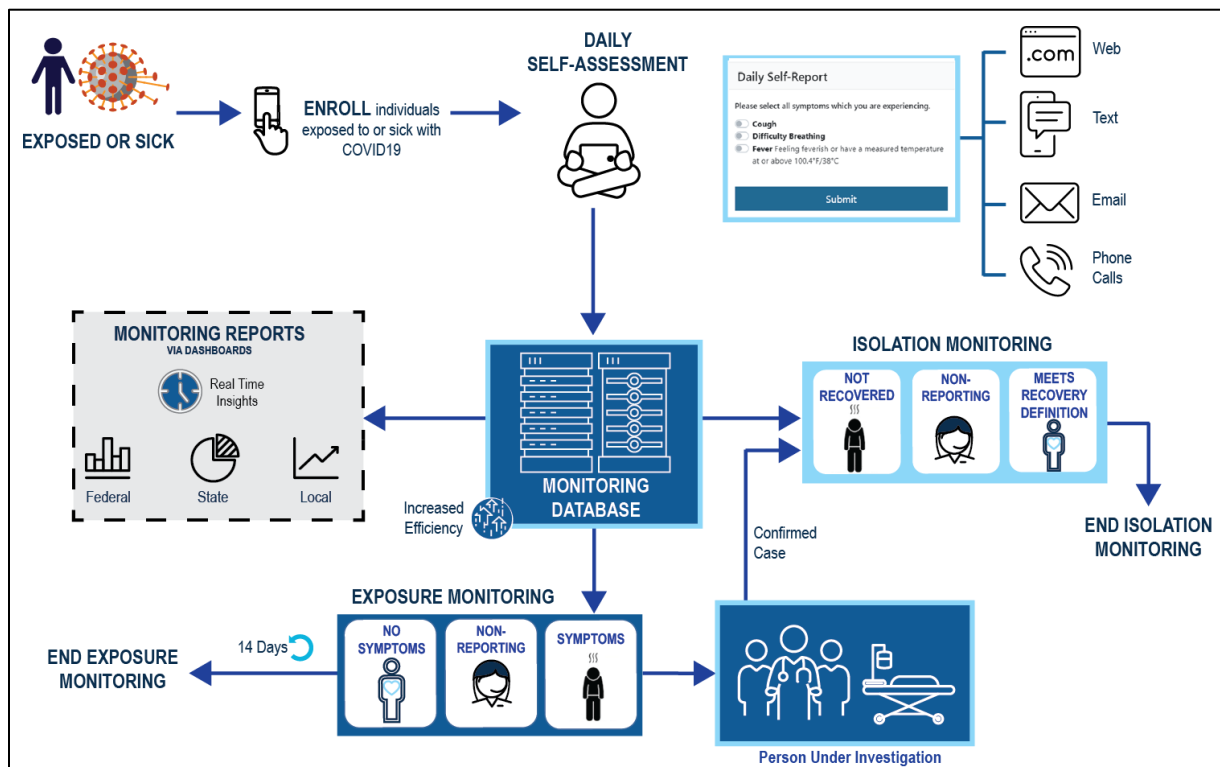


Figure 2. Sara Alert™ Workflow Summary

Visit saraalert.org for more information about Sara Alert, including FAQs, tutorial videos, and fact sheets. To send questions, comments, or other feedback related to Sara Alert, email sarasupport@aimsplatform.com.

2 ENROLLER ROLE OVERVIEW

An enroller is a trusted user who can add new monitorees into Sara Alert™ who require public health monitoring. Enrollers can enroll monitorees into either the exposure or isolation workflow.

TIP: See the [Quick Start Guide for Enrollers](#)

Table 1. Functional Role Summary

Role	Enroll New Exposed Monitoree	Enroll New Case	View/Modify Enrollment Details	View Monitoring Line Lists	View/Modify Monitoring Actions	View/Add/Modify Symptom Reports	View/Add Lab Reports	Transfer Records	View History/Add Comments	Import records	Export Records	View and export analytics	Add/modify system users	View list of system users	Record Access
Enroller	✓	✓	✓												Only records added by the user

2.1 Record Access

- An enroller only has access to records that they added to the system.
- An enroller can only view or modify data elements that can be entered during enrollment including demographics, exposure history, and planned travel; enrollers cannot view symptom report information submitted by monitorees, public health actions, or comments made by users.
- At the time of enrollment, the system will check for potential duplicate records among records that the user has access to; for enrollers, this is records that the user has created.

2.2 Enroller Capabilities

- Enroll a new monitoree into the exposure workflow
- Enroll a new case into the isolation workflow
- Assign record to another jurisdiction that the enroller has access to (e.g., State enroller can assign cases to local jurisdiction within state)
 - The user's assigned jurisdiction is the default jurisdiction assigned to a record
- View enrollment details of monitorees enrolled by user
- Modify enrollment details of monitorees enrolled by user
- View summary enrollment statistics by user and user jurisdiction

2.3 Workflow

- Enrollers can enroll monitorees (contacts) into the exposure workflow
- Enrollers can enroll cases into the isolation workflow

3 GETTING STARTED

3.1 Logging In

1) Open Sara Alert™ in a web browser. Compatible web browsers include Chrome, Microsoft Edge, Microsoft Internet Explorer 11, Mozilla Firefox, and Safari. If using Microsoft Internet Explorer 11, you may need to turn off compatibility mode.

2) Log in using your credentials.

If this is your *first login attempt*, use the temporary password you were issued; you will be prompted to change it. Temporary passwords **expire after 72 hours**. If your temporary password has expired, contact your jurisdiction administrator for a password reset.

TIP: If you are having difficulty logging in with the temporary password, type it in instead of using cut and paste




Figure 3: Log in screen

3) Register for two-factor authentication (2FA) by providing a phone number. (**NOTE:** this is only required the first time you use Sara Alert™). This is how you will receive your 7-digit 2FA token number. Once you have entered your phone number and country (for the country code), click “**Register**”.




Figure 4: Enter your phone number.

4) For all login attempts after initial registration, you will be prompted to choose how to receive the 7-digit 2FA token (i.e., SMS/Text or through a phone call).

- Select your preferred method to receive the 2FA token
- Enter the 7-digit token when you receive it and click “Submit”

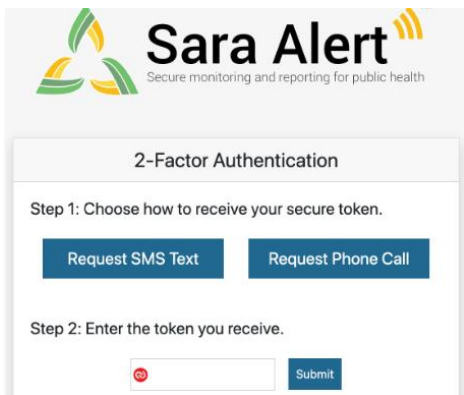


Figure 5: Choose your 2FA method.

5) You will be taken to the Enrollment Dashboard

6) Your assigned jurisdiction is listed in the upper right-hand corner of the screen. You can only see records for monitorees whom you have enrolled.

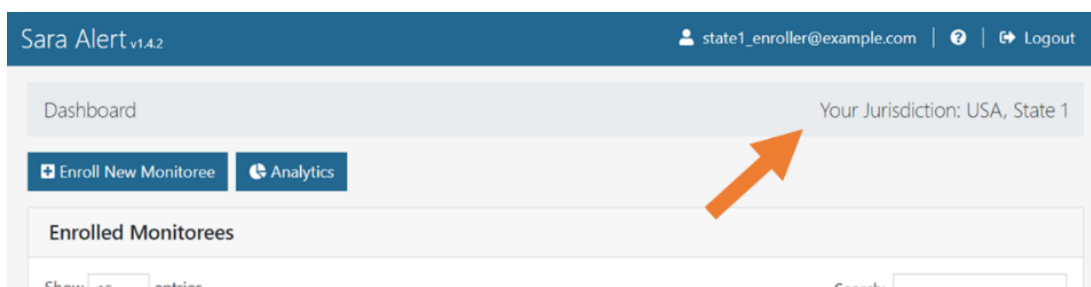


Figure 6: Your Sara Alert™ jurisdiction

7) The “**Help**” button provides links to the User Guide and other helpful resources, including how to contact the Sara Alert™ team for help.

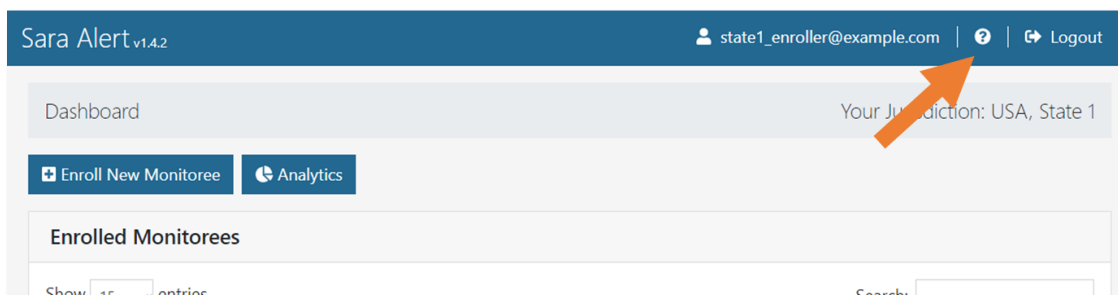


Figure 7: Access to Sara Alert™ resources

8) To end the session, click “**Logout**”. Users should log out of the system when they are not using it.

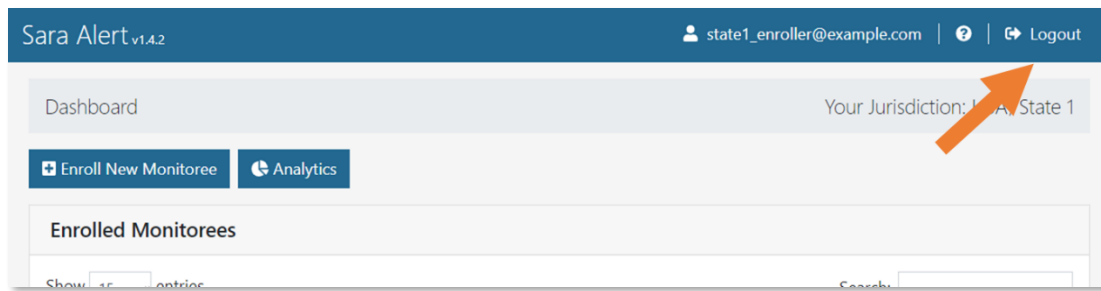


Figure 8: The Logout button

4 MONITOREE DETAILS/ENROLLMENT WIZARD

The Enrollment Wizard organizes the Monitoree Details into 6 different screens that allow an **Enroller** to add information in a defined sequence. The enrollment wizard is used to collect the information described below. **Monitorees enrolled through the user interface can be added to either the exposure or isolation workflow.** A description of the fields available in the enrollment wizard and saved in the Monitoree Details section of the monitoree record are described below.

A video tutorial for this section (Monitoree Record Detail Overview) is available at: saraalert.org/public-health/tutorial-videos/

4.1 Monitoree Identification

- Select workflow to enroll monitoree (exposure or isolation)
- Includes name and demographic information, as well as any existing state/local/Federal ID numbers
- Includes primary and secondary languages spoken by the monitoree. The primary language field is used to determine in what language the notifications from the system to the monitorees will be sent
- Languages that are not fully supported are designated with a *. If a language is selected that is currently not supported, the system will send notifications in English

4.2 Monitoree Address

- Home Address Within USA (U.S. Residents)
 - Address at Destination in USA Where Monitored: If the same as the home address, select the “**Copy from Home Address**” option
- Home Address Outside USA (Non-Residents)
 - Address at Destination in USA Where Monitored: Enter data here for individuals who are temporarily staying in the U.S. during their monitoring period

4.3 Monitoree Contact Information

- **“Preferred Reporting Method”** indicates how monitorees will receive notifications to submit daily symptoms reports (email, SMS text, phone, etc.)
 - Some fields are conditionally required depending on the selected “preferred reporting method”
 - Message and data rates may apply depending on the contact method selected
 - If a monitoree’s preferred reporting method is not yet known, the user may select **“Unknown”** and the monitoree will not receive notifications. This is the system default value
 - If a monitoree is enrolled in the system but has requested not to receive notifications, the user may select **“Opt-Out”** for preferred reporting method and the monitoree will not receive notifications
 - Monitorees with **“Opt-Out”** or **“Unknown”** selected will appear on the non-reporting line list the day after enrollment
- **“Preferred Contact Time”** should be specified for SMS and phone contact methods for the monitoree to receive automated daily requests for symptoms
 - Morning is between 8 AM and noon in local time zone
 - Afternoon is between noon and 5 PM in local time zone
 - Evening is between 5 PM and 8 PM in local time zone
 - The local time zone for monitorees is determined by the monitoree’s **address state data element** located on the “Monitoree Address” enrollment screen. The time zone for each state has been assigned based on each state’s population center
 - If address state is left blank, the eastern time zone is used by default

TIP: See the [Quick Start Guide for Preferred Reporting Method](#)

TIP: If **“unknown”** or **“opt out”** is the current preferred reporting method, a user will need to update the reporting method (email, SMS, or phone) for the monitoree to begin receiving daily notifications.

TIP: If the user **does not** specify a preferred contact time, the system will send daily requests during the “Afternoon” contact times.

4.4 Monitoree Arrival Information

- Fields on this screen are optional since all monitorees will not have travel history. If travel history is available, it should be entered into the system

4.5 Additional Planned Travel

- Fields on this screen are optional since not all monitorees will plan to travel during their monitoring period

4.6 Monitoree Potential Exposure or Case Information

Some of the fields on the final screen on the enrollment wizard differ depending on which workflow is selected (exposure or isolation) on the first screen. These are described below.

4.6.1 Exposure Workflow

- The “**Last Date of Exposure**” field is used by the system to automatically calculate the monitoring period.
 - A user may enter a date that is up to 30 days after the current date.
- **Continuous Exposure:** A user can toggle this switch to “on” if the monitoree is being continuously exposed (e.g., household contact with a confirmed case, healthcare worker). Sara Alert™ will then extend the monitoree’s monitoring period indefinitely until **either**:
 - Continuous Exposure is turned off; **or**
 - The Last Date of Exposure is updated
 - Once one of these conditions is met, the monitoring period will be updated to 14 days after Last Date of Exposure. The system will continue to send daily messages until the monitoring period has elapsed.
- Some exposure risk factors have free text fields to allow for specific exposures to be documented. In instances where there may be multiple applicable answers (e.g., the monitoree visited multiple healthcare facilities with known cases), use commas to separate multiple specified values.
 - The “**Member of Common Exposure Cohort**” field can be used to track different types of shared exposures (i.e., outbreak at a workplace, facility, event, etc.)

4.6.2 Isolation Workflow

- “**Symptom Onset**” date is used by the system to determine if the non test-based recovery definition in the isolation monitoring workflow has been met.
 - A user may enter a date that is up to 30 days after the current date.
- The “**Case Status**” field can be set to “Confirmed” or “Probable.” Users should assign case status according to current guidelines provided by their jurisdiction. For reference, the latest CSTE surveillance case definitions can be found at: <https://www.cste.org/page/PositionStatements>.

4.6.3 Both Workflows

- The “**Assigned Jurisdiction**” field can be updated on enrollment.
 - The default jurisdiction will match the user’s assigned jurisdiction displayed in the upper right-hand corner of the screen.
 - The list of available jurisdictions at enrollment will only be populated with jurisdictions to which the user has access to (e.g., State enroller can assign cases to a local jurisdiction within state)
 - If a record needs to be transferred to a jurisdiction that the user does not have access to, a public health user will need to transfer the record after enrollment.
- The “**Assigned User**” field can be specified on enrollment.
 - Used to identify the user or group within a jurisdiction responsible for monitoring a monitoree

- Each jurisdiction should determine their own Assigned User identification conventions (e.g., assign user number to each user, assign user number to groups or teams, assign user number to call center stations, etc.)
- Each jurisdiction within the jurisdictional hierarchy can assign any allowed assigned user numbers; thus a state user and county user within that state can be assigned the same assigned user number unless a coding convention is established at the state level to prevent this. Thus, both the assigned jurisdiction and assigned user fields uniquely identifies each assigned user
- This field does not change who can see or modify a record, it is instead intended to help jurisdictions organize and track which of their personnel are assigned to a given record
- This field is optional and can be updated later

5 ENROLLER CAPABILITIES

5.1 How to Enroll New Monitoree (Contact or Case)

- 1) Click the “**Enroll New Monitoree**” button.

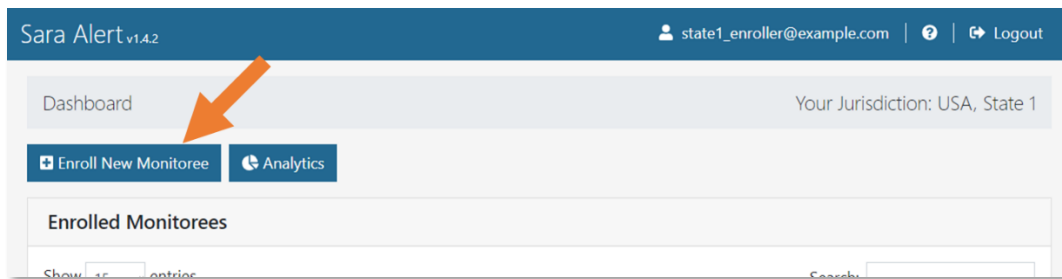


Figure 9: Enroll a new monitoree

- 2) Select the appropriate workflow to enroll the monitoree in

- **Exposure (contact):** Use this workflow if the new monitoree was potentially exposed
- **Isolation (case):** Use this workflow if the monitoree is a confirmed case

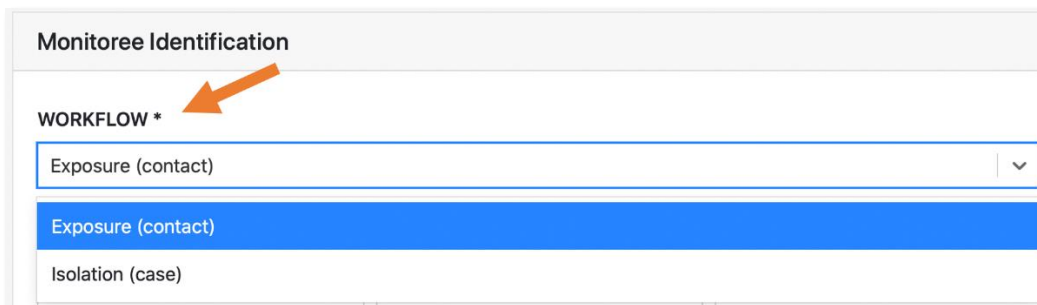


Figure 10: Select Exposure of Isolation workflow

- The final page of the Enrollment Wizard differs based on workflow
 - **Exposure workflow:** Exposure Risk factor data elements
 - **Isolation workflow:** Symptom Onset Date and Case Status (as available)

How to Enroll New Monitoree (Contact or Case)

3) Enter information on enrollment screens. To advance, click **“Next”**. To return to a previous screen, click **“Previous.”** Required fields (*) must be completed before you can advance through the enrollment process.

Figure 11: Enter new monitoree enrollment information

4) Review the enrollment data and save the record.

- Select **“Edit”** to return to previous enrollment screens (if needed).
- Select **“Finish”** to create the record. The record is not created until **“Finish”** is selected. If you navigate away from the enrollment wizard before selecting **“Finish”**, the record will not be saved.

Figure 12: Click “Finish” to save the record

NOTE: If the monitoree’s preferred contact information matches that of an existing record that you have enrolled, the two records will be linked as a reporting household. See **page 20** for instructions on how to remove a record from a household.

5) Sara Alert™ identifies potential duplicates based on exact match of first name, last name, sex, and date of birth **OR** an exact match of the State/Local ID at the time of enrollment. If the record is flagged as a potential duplicate, a message will appear informing the user which match criteria were met, and asking if you want to create a potentially duplicate record.

NOTE: Sara Alert™ check for potential duplicates amongst records that a user has access to. This means that the system will check to see if a record being enrolled has already been created by the user (and not by other users in the system).

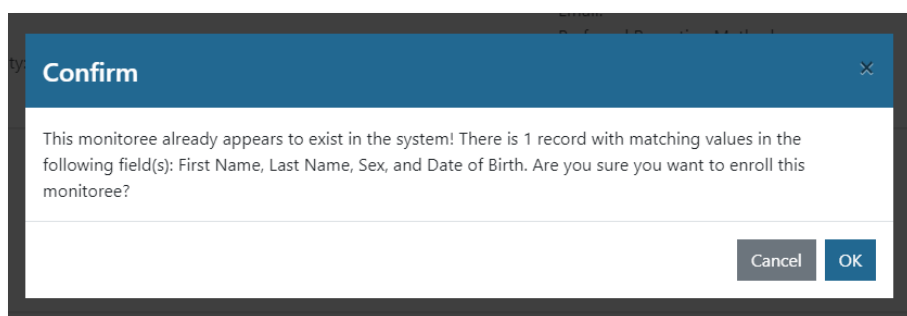


Figure 13: A confirmation box will appear for potential duplicate records

5.2 How to Edit Monitoree Enrollment Information

Enrollers can modify monitoree records to which they have access (e.g., add new information or correct data entry errors). An enroller only has access to records that they have created in the system.

1) Search for the monitoree of interest on the Enrollment Dashboard. Users can use the “Search” bar on the dashboard to find records that match search terms in any of the following fields:

- First Name
- Last Name
- Date of Birth (format: DD/MM/YYYY)
- Enrollment Date (format: DD/MM/YYYY)
- State/Local ID

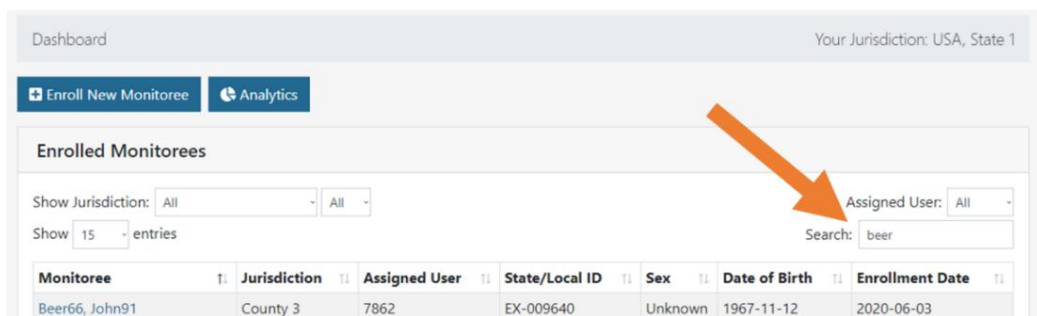
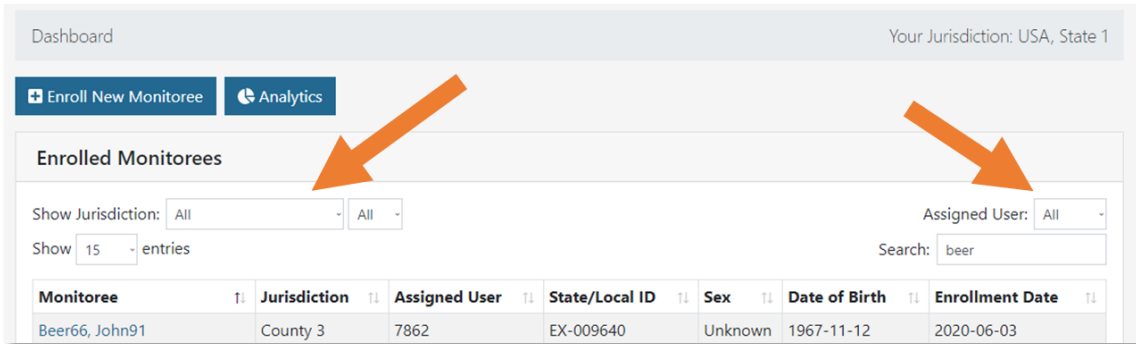


Figure 14: Search enroller dashboard

2) You can also filter for monitorees based on their assigned jurisdiction (if applicable) or the user who has been assigned to their record.



Dashboard Your Jurisdiction: USA, State 1

[Enroll New Monitoree](#) [Analytics](#)

Enrolled Monitorees

Show Jurisdiction: All All

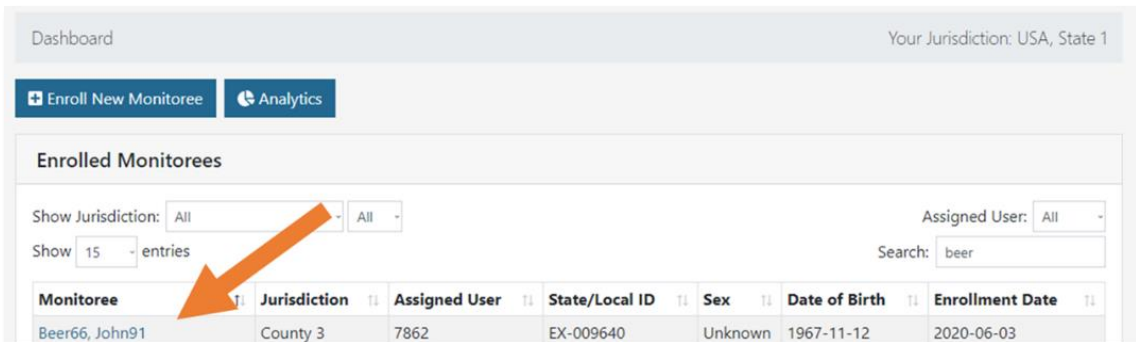
Show 15 entries Assigned User: All

Search: beer

Monitoree	Jurisdiction	Assigned User	State/Local ID	Sex	Date of Birth	Enrollment Date
Beer66, John91	County 3	7862	EX-009640	Unknown	1967-11-12	2020-06-03

Figure 15: Filter by jurisdiction or assigned user

3) Open the monitoree record by clicking on their name in the “Monitoree” column.



Dashboard Your Jurisdiction: USA, State 1

[Enroll New Monitoree](#) [Analytics](#)

Enrolled Monitorees

Show Jurisdiction: All All

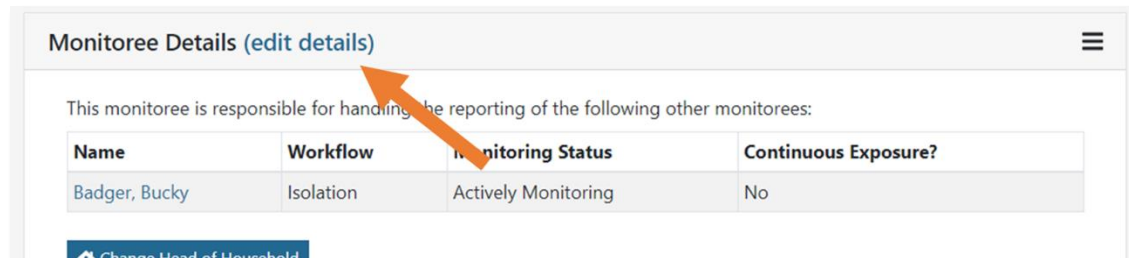
Show 15 entries Assigned User: All

Search: beer

Monitoree	Jurisdiction	Assigned User	State/Local ID	Sex	Date of Birth	Enrollment Date
Beer66, John91	County 3	7862	EX-009640	Unknown	1967-11-12	2020-06-03

Figure 16: Select monitoree record

4) Select “edit details” in the upper left of the screen to make necessary changes.



Monitoree Details (edit details) ☰

This monitoree is responsible for handling the reporting of the following other monitorees:

Name	Workflow	Monitoring Status	Continuous Exposure?
Badger, Bucky	Isolation	Actively Monitoring	No

[Change Head of Household](#)

Figure 17: Modify monitoree record

5.3 How to Create a Reporting Household with a Head of Household Reporter Using the Enrollment Wizard

Sara Alert™ allows a group of monitorees to, if they so choose, **report symptoms as a single household unit**. If they choose to do so, the system will link their records and contact only the designated Head of Household who will report daily symptom information on behalf of household members.

Tip: See the [Quick Start Guide for Household Reporting](#)

NOTE: If the Head of Household record is closed for any reason, the Head of Household will continue to receive daily symptom reports for the remaining reporting eligible household members. If the Head of Household no longer wishes to report on behalf of linked household members, a user should update the Head of Household (see [page 17](#)).

Tip: A reporting household in Sara Alert™ is defined by shared contact information (phone number or email address).

Enrollers can create reporting households using the following steps in the Enrollment Wizard:

- 1) Enroll the Head of Household (see [page 10](#)). The first household member enrolled is defined as the default Head of Household (HOH). The HOH will be responsible for reporting on behalf of each subsequent household member enrolled (e.g., household reporter).
- 2) Select “**Finish and add a Household Member**” to save the HOH record and add a new reporting household member whose daily report will be submitted by the HOH.

The screenshot shows the Enrollment Wizard interface. On the left, under 'Additional Planned Travel', there are fields for Type, Place, Port Of Departure, End Date, and Start Date. On the right, under 'Potential Exposure Information', there is a section for 'LAST EXPOSURE' with details like 'Orlando Hotel' and '2020-06-01'. Below this, a red warning message states 'WALK-IN HEALTH CARE FACILITY WITH KNOWN CASES'. At the bottom, there are four buttons: 'Previous', 'Finish and Add a Household Member' (highlighted with an orange arrow), 'Finish', and 'Cancel'.

Figure 18: Create household using enrollment wizard

- 3) Confirm that you would like to enroll reporting household members by clicking “**Continue**”.

The screenshot shows a dialog box titled 'Enroll Household Members'. The text inside explains that household enrollment allows the Head of Household to submit reports on behalf of other members. It states that by clicking 'continue', additional household members will have their daily reports submitted by the Head of Household. It also notes that household members who wish to report on their own behalf should be enrolled separately and not added using the 'Finish and Add a Household Member' button. At the bottom right, there are two buttons: 'Cancel' and 'Continue' (highlighted).

Figure 19: Note how Sara Alert™ handles household enrollment

How to Create a Reporting Household with a Head of Household Reporter Using the Enrollment Wizard

NOTE: Any household member who would like submit reports on their own behalf should be enrolled individually and not as a reporting household member as shown below. In this case, the monitoree must provide unique contact information (phone number and email address). Unique contact information is required to prevent a race condition, where the system receives multiple responses from the same number or email and is unable to determine for which monitoree the report has been submitted.

4) The subsequent household member enrollment screens will be pre-populated with the same address, contact information, arrival information, additional planned travel, and potential exposure information as the HOH. These values can be edited, if different among household members, in each of the data entry screens or by clicking **“Edit”** at the monitoree review screen.

Tip: Users may need to edit exposure information, including last date of exposure, for individuals who were secondarily exposed through a household member.

Monitoree Review

Assigned Jurisdiction: USA, State 1

Identification: Minnie Mouse [Edit](#)

DOB: 2001-01-01 Sex:
Age: 19 Race:
Language: Ethnicity:
State/Local ID: Nationality:
CDC ID:
NNDSS ID:

Contact Information [Edit](#)

Phone: 1231241234
Preferred Contact Time:
Type:
Email:
Preferred Reporting Method: Telephone call

Address [Edit](#)

1510 Disney Road
Magic Kingdom Florida 44444

Arrival Information [Edit](#)

DEPARTED ARRIVAL

Additional Planned Travel [Edit](#)

Type:
Place:
Port Of Departure:
End Date:
Start Date:

Potential Exposure Information [Edit](#)

LAST EXPOSURE
Orlando Hospital
2020-06-04
WAS IN HEALTH CARE FACILITY WITH KNOWN CASES:

Figure 20: Sara Alert™ Automatically Pre-Populates Information for Household Members

5) Select **“Finish and Add Household Member”** at the bottom of the enrollment review screen to continue to enroll additional household members. The HOH will be responsible for reporting on behalf of each household member who is actively being monitored.

Additional Planned Travel [Edit](#)

Type:
Place:
Port Of Departure:
End Date:
Start Date:

Potential Exposure Information [Edit](#)

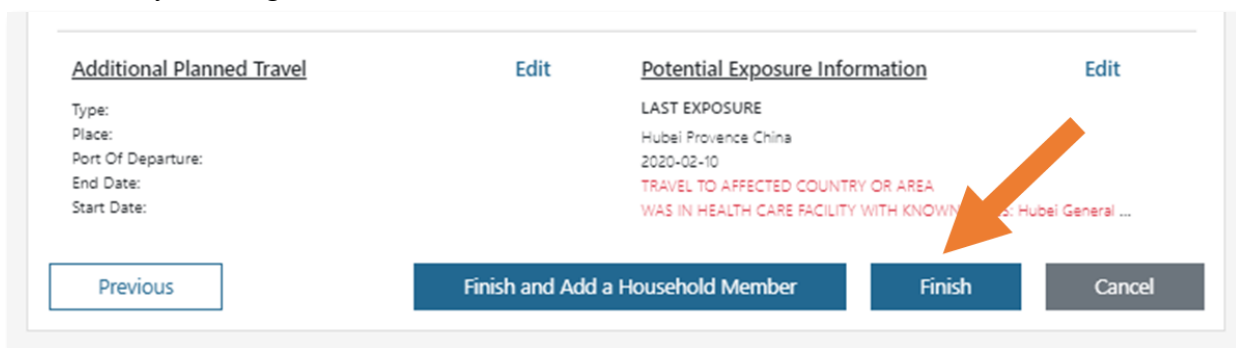
LAST EXPOSURE
Orlando Hos
2020-06-04
WAS IN HEALTH CARE FACILITY WITH KNOWN CASES:

[Previous](#) [Finish and Add a Household Member](#) [Finish](#) [Cancel](#)

Figure 21: Monitoree record review

How to Create a Reporting Household with a Head of Household Reporter Using the Enrollment Wizard

6) After enrolling the last household member to the group, close enrollment of members to a household by clicking **“Finish”** at the bottom of the enrollment review screen.

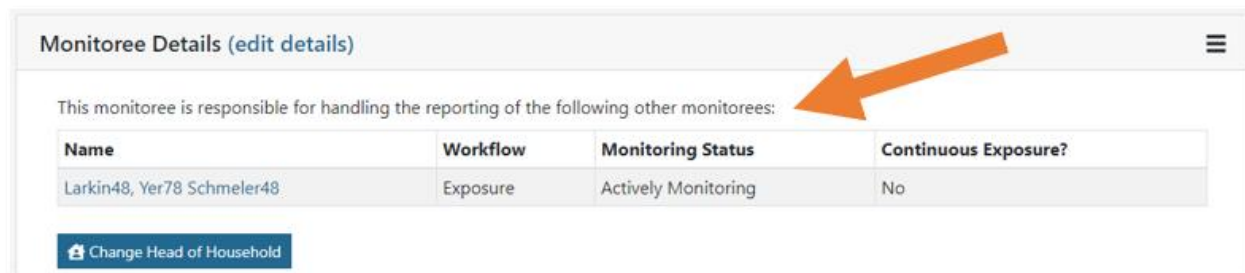


The screenshot shows the enrollment review screen with two main sections: 'Additional Planned Travel' and 'Potential Exposure Information'. The 'Additional Planned Travel' section includes fields for Type, Place, Port Of Departure, End Date, and Start Date. The 'Potential Exposure Information' section includes fields for LAST EXPOSURE, Hubel Province China, 2020-02-10, TRAVEL TO AFFECTED COUNTRY OR AREA, and WAS IN HEALTH CARE FACILITY WITH KNOWN CASES: Hubel General ... An orange arrow points to the 'Finish' button at the bottom right of the screen.

Figure 22: Click “Finish” once all household members have been enrolled

7) The records for household members will be linked in the user interface so users can identify monitorees whose reports are submitted by another person (Head of Household). As shown below, household members are listed in the record of the HOH along with their workflow, monitoring status, and continuous exposure status.

NOTE: As an enroller, you can only access the records of household members that you have enrolled. If you click on a record and are redirected to the dashboard, that means that you do not have access to that record and that another user enroller that household member.



The screenshot shows the 'Monitoree Details (edit details)' screen. It includes a header with a menu icon. Below the header, there is a text box stating 'This monitoree is responsible for handling the reporting of the following other monitorees:'. An orange arrow points to this text box. Below the text box is a table with four columns: Name, Workflow, Monitoring Status, and Continuous Exposure?. The table contains one row with the following data: Larkin48, Yer78 Schmeler48, Exposure, Actively Monitoring, No. Below the table is a button labeled 'Change Head of Household'.

Name	Workflow	Monitoring Status	Continuous Exposure?
Larkin48, Yer78 Schmeler48	Exposure	Actively Monitoring	No

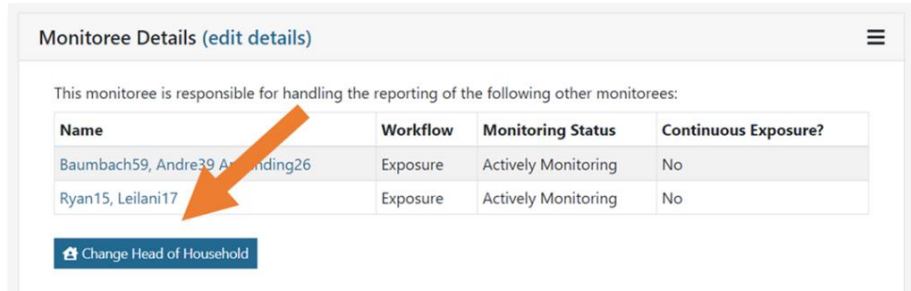
Figure 23: The Head of Household's record

5.4 How to Change a Head of Household (Household Reporter)

A user with the Enroller role can change which member of a household is designated “Head of Household” (and therefore is responsible for reporting symptoms on behalf of the group) among records to which the user has access.

NOTE: The drop-down will only populate with names of monitorees that a user has access to. For an enroller, this will include only household records created by that user.

1) Open the HOH’s record. Click the **“Change Head of Household”** button located in the Head of Household’s details section.



Monitoree Details (edit details)

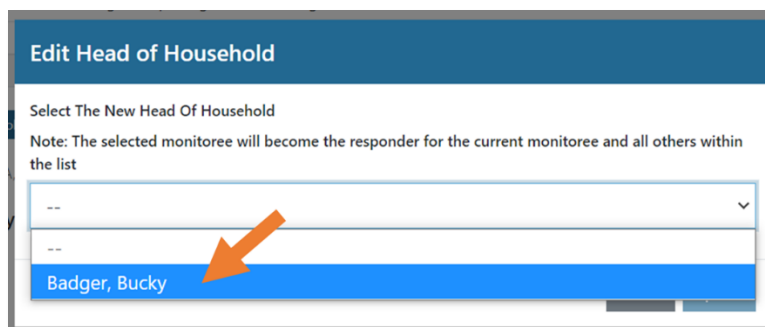
This monitoree is responsible for handling the reporting of the following other monitorees:

Name	Workflow	Monitoring Status	Continuous Exposure?
Baumbach59, Andre39 A...nding26	Exposure	Actively Monitoring	No
Ryan15, Leilani17	Exposure	Actively Monitoring	No

[Change Head of Household](#)

Figure 24: Click “Change Head of Household”

2) Select the member of the household you would like to make Head of Household from the drop-down list. The drop-down list only includes other individuals in the current household. The individual selected will be made the new HOH and will be responsible for reporting on behalf of all household members.



Edit Head of Household

Select The New Head Of Household

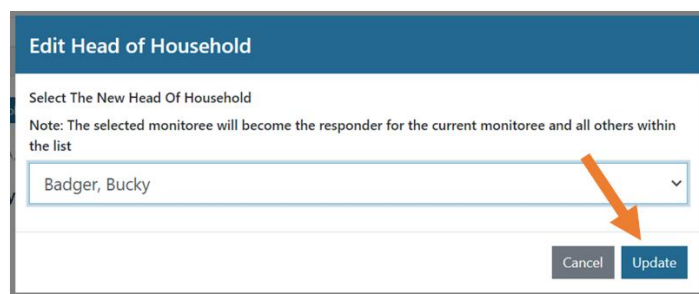
Note: The selected monitoree will become the responder for the current monitoree and all others within the list

-- --

Badger, Bucky

Figure 25: Select the preferred Head of Household

3) Click **“Update”** to save the new Head of Household.



Edit Head of Household

Select The New Head Of Household

Note: The selected monitoree will become the responder for the current monitoree and all others within the list

Badger, Bucky

[Cancel](#) [Update](#)

Figure 26: Click Update to save the Head of Household

How to Change a Head of Household (Household Reporter)

5.5 How to Enroll a New Household Member into an Existing Household

1) Open the appropriate HOH's record. Select **“edit details”**.

Monitoree Details (edit details)

This monitoree is not a member of a household:

[Move To Household](#)

Assigned Jurisdiction: USA, State 2
Assigned User: 900

Identification: Cammie88 Hills21 Kuhn89

Figure 27: Edit HOH record to add new household member

2) Select **“Finish and Add a Household Member”**. Select **“Continue”** to confirm enrollment of household member.

Preferred Reporting Method: E-mailed Web Link

Additional Planned Travel [Edit](#) Potential Exposure Information

Type:
Place:
Port Of Departure:
End Date:
Start Date:

LAST EXPOSURE
2020-05-18
CLOSE CONTACT WITH UNKNOWN CASE:

[Previous](#) [Finish and Add a Household Member](#) [Finish](#)

Figure 28: Select "Finish and Add a Household Member" to add new household member

3) Complete “Monitoree Information” fields and select **“Next”** to review household data on remaining enrollment wizard screens. Select **“Finish”** to save record. The additional monitoree will be linked to the HOH record. The monitorees a HOH is responsible for reporting on and their workflow, monitoring status, and continuing exposure status can be seen in their Monitoree Details section.

Monitoree Details (edit details)

This monitoree is responsible for handling the reporting of the following other monitorees:

Name	Workflow	Monitoring Status	Continuous Exposure?
Larkin48, Yer78 Schmeler48	Exposure	Actively Monitoring	No

[Change Head of Household](#)

Figure 29: New household member has been linked to HOH

5.6 How to Move an Existing Record into a Reporting Household

The “move to household” function allows users to create households from existing records in the system. A user can either add a record to an existing household or create a new household from two records.

- 1) Open the appropriate monitoree record and click the “Move to Household” button.

Monitoree Details (edit details)

This monitoree is not a member of a household:

[Move To Household](#)

Assigned Jurisdiction: USA, State 1, County 1
Assigned User: 131

Identification: Jermaine Brown86 Corkery40

DOB: 1963-06-05 Sex: Male
Age: 57 Race: Asian
Language: French Ethnicity: Not Hispanic or Latino

Contact Information
Phone: (555) 555-0117
Preferred Contact Time: Evening
Type: Smartphone

Figure 30: Click "Move to Household"

- 2) From the drop-down, select the name of the person who should report on behalf of the current monitoree; the selected record will be the HOH for the current monitoree.

NOTE: The drop-down will only populate with names of monitorees that a user has access to. For an enroller, this is only records created by that user.

Buckridge84, Keven57 Age: 28, State ID:

Brown01, Tabitha48 Age: 5, State ID:

Bruen06, Anette91 Age: 6, State ID: EX-497140

Buckridge58, Chester65 Age: 31, State ID: EX-670603

Bunny, Bugs Age: 30, State ID:

Bunny, Bugs Age: , State ID:

Bunny, Bugs Age: , State ID:

Busch, Elena Age: 28, State ID:

Busch, Baby Age: 4, State ID:

Carter10, Irwin51 Age: 40, State ID: EX-652778

Buckridge84, Keven57 Age: 28, State ID:

Cancel Update

Figure 31: Select which household you would like to add the monitoree to

- 3) Select “Update” to move the monitoree into the selected HOH’s household.

Move To Household

Select The New Monitoree That Will Respond For The Current Monitoree

Note: The current monitoree will be moved into the selected monitoree's household

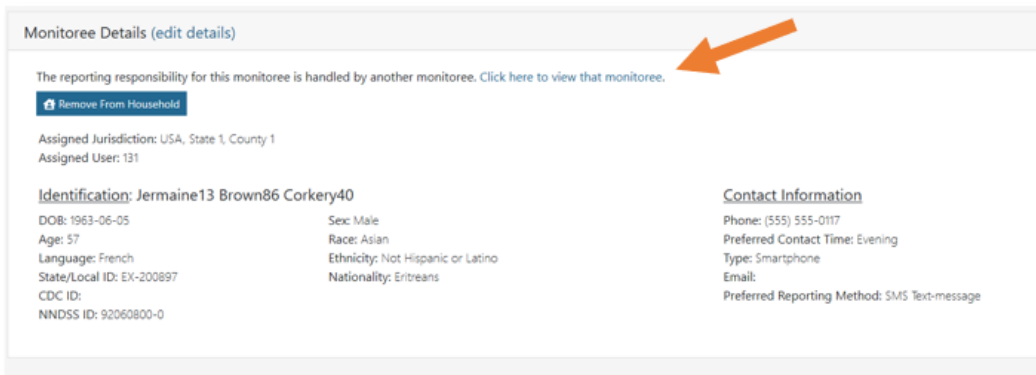
Buckridge84, Keven57 Age: 28, State ID:

Cancel Update

Figure 32: Select "update" to move the monitoree into the selected household

How to Move an Existing Record into a Reporting Household

- 4) The selected HOH will now be responsible for reporting on behalf of the monitoree, and the monitoree will appear in their household.



Monitoree Details (edit details)

The reporting responsibility for this monitoree is handled by another monitoree. [Click here to view that monitoree.](#)

[Remove From Household](#)

Assigned Jurisdiction: USA, State 1, County 1
Assigned User: 131

Identification: Jermaine13 Brown86 Corkery40		Contact Information
DOB: 1963-06-05	Sex: Male	Phone: (555) 555-0117
Age: 57	Race: Asian	Preferred Contact Time: Evening
Language: French	Ethnicity: Not Hispanic or Latino	Type: Smartphone
State/Local ID: EX-200897	Nationality: Eritreans	Email:
CDC ID:		Preferred Reporting Method: SMS Text-message
NNDSS ID: 92060800-0		

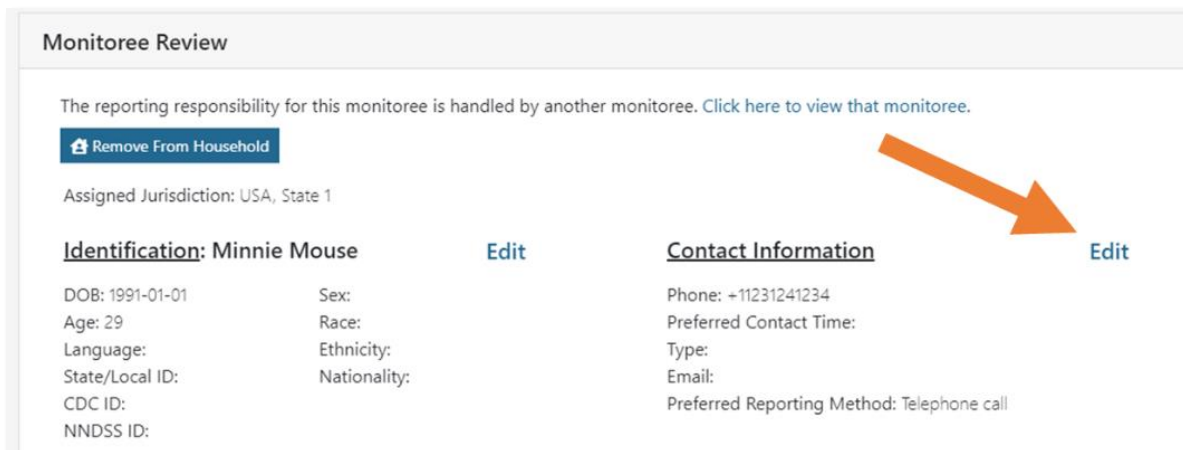
Figure 33: The selected Head of Household is now responsible for reporting on behalf of the monitoree

5.7 How to Remove a Household Member from an Existing Reporting Household

A household member cannot be removed from their household until their email and primary telephone number differ from those of the current Head of Household.

- 1) Open the household member record of interest. Select **“Edit Details”**. Then select **“Edit”** for the **“Contact Information”** section.

Tip: If you click **“Remove from Household”** prior to updating the individual’s contact information, you will be prompted to do so before the person can be removed from the reporting household.



Monitoree Review

The reporting responsibility for this monitoree is handled by another monitoree. [Click here to view that monitoree.](#)

[Remove From Household](#)

Assigned Jurisdiction: USA, State 1

Identification: Minnie Mouse	Edit	Contact Information	Edit
DOB: 1991-01-01	Sex:	Phone: +11231241234	
Age: 29	Race:	Preferred Contact Time:	
Language:	Ethnicity:	Type:	
State/Local ID:	Nationality:	Email:	
CDC ID:		Preferred Reporting Method: Telephone call	
NNDSS ID:			

Figure 34: Edit contact information for record to be removed from household

2) Update the email and primary telephone number in the fields shown below. The contact information must be different from the HOH record. Select “**Next**” then “**Finish**” to save the changes.

Monitoree Contact Information

PREFERRED REPORTING METHOD *

E-mailed Web Link

PRIMARY TELEPHONE NUMBER

+1555555555

PRIMARY PHONE TYPE

Smartphone: Phone capable of accessing web-based reporting tool
 Plain Cell: Phone capable of SMS messaging
 Landline: Has telephone but cannot use SMS or web-based reporting tool

E-MAIL ADDRESS

newemail@example.com

CONFIRM E-MAIL ADDRESS

Figure 35: Update telephone number and email address

3) Select “**Remove from Household**”. This monitoree will be removed from the current household and will be responsible for their own reporting.

Monitoree Details (edit details)

The reporting responsibility for this monitoree is handled by another monitoree. [Click here to view that monitoree.](#)

Remove From Household

Assigned Jurisdiction: USA, State 1

Figure 36: Select “Remove Household” to complete action

5.8 How to View Enrollment Analytics

The analytics summary for enrollers shows:

- Summary of enrollments made by user (“Your statistics”)
- Summary of total enrollments in the user’s assigned jurisdiction (“System Statistics”)

To view enrollment analytics, select the “**Analytics**” button. This data used in the analytics summary is updated once a day.

Sara Alert v1.4.2

state1_enroller@example.com | ? | Logout

Dashboard

Your Jurisdiction: USA, State 1

Enroll New Monitoree **Analytics**

Enrolled Monitorees

Figure 37: View enrollment analytics

How to View Enrollment Analytics

6 MONITOREE SELF-REPORTING OVERVIEW

Monitorees are individuals who have been enrolled by a trusted enroller for public health monitoring. Monitorees in the exposure and isolation workflow will receive messages during the monitoring period for as long as they are eligible.

Tip: See the [Quick Start Guide for Preferred Reporting Method](#)

Monitorees will not have Sara Alert™ accounts (e.g., no user name and password); while being actively monitored, each monitoree or Head of Household reporter will be sent a daily notification to submit a symptom report that is linked to their record(s).

6.1 Monitoree Message Summary by Reporting Method

Below is a summary of messages sent to monitorees that are eligible to receive notifications from the system depending on the specific reporting methods. Records with “unknown” or “opt-out” do not receive messages so are not included in the summary.

Table 2: Summary of Messages Sent to Eligible Monitorees By Reporting Method

	E-mailed Web Link	SMS-Texted Weblink	SMS Text message	Telephone Call
Welcome message¹	Sent immediately following enrollment	Sent immediately following enrollment	Sent immediately following enrollment	No welcome message sent
Reminder Message Sent until response is logged?	No, one daily request sent	No, one daily request sent	Yes, up to 3 per day during preferred contact time	Yes, up to once/hour during preferred contact time
Can set preferred contact time?	No	Yes	Yes	Yes
Daily Report Message Timing	Approximately every 24 hours, starting at enrollment time	During Preferred Contact Time	During Preferred Contact Time	During Preferred Contact Time
Daily Report Format	List of yes/no questions for each symptom	List of yes/no questions for each symptom	Single yes/no question for all symptoms	Single yes/no question for all symptoms
Daily Message Format (single monitoree)	Email with single weblink to symptom report	Two texts (one identifies the monitoree by initials and age; the second includes the weblink to report)	Text message with single yes/no response for all symptoms listed	Phone call with single yes/no response for all symptoms listed
Daily Message Format (Reporting Household)	Single email with weblinks for each active household member (denoted by initials and age)	Two texts for each active household member (one identifies household member by initials and age; the second includes weblink to report for that member)	Single text message with single yes/no response for all symptoms listed for all active household members	Single phone call with single yes/no question for all active household members

¹ If the preferred contact method is initially set to “Unknown” or “Opt-Out” and later updated, the monitoree **will not** receive a welcome message from the system.

6.2 Summary of Messages Sent to Monitorees

6.2.1 Language

Monitorees will receive messages according to the primary language settings in the record (available on the Monitoree Identification enrollment screen). Languages that are not fully supported are indicated with a *. Other selected languages will default to English notifications. If a partially supported language is selected on enrollment, a note will appear with more details.

6.2.2 Welcome Message (Email and SMS only)

- Monitorees who select **email** or **SMS** as the preferred reporting method at the time of enrollment **will receive an initial welcome notification** from the system via that method immediately after enrollment is completed.
- Monitorees who selected **Telephone Call** as the preferred method **will not** receive a specific welcome call. The SMS welcome message does not prompt monitorees for a symptom report; the email welcome message provides a link for the monitoree to submit their daily report. It is important to coordinate the timing of system welcome messages with monitorees so that they know the message is legitimate.
- If the preferred contact method is initially set to **“Unknown”**, **“Opt-Out”**, or **“Telephone Call”** and later updated to **“Email”** or **“SMS”**, the monitoree **will not** receive a welcome message from the system.

6.2.3 Daily Symptom Report Message Timing (Email, SMS, and Phone)

Daily Symptom Report messages allow for monitorees and head of household reporters to submit symptom reports to Sara Alert™. It is important to set daily reporting expectations with monitorees to ensure compliance with local reporting requirements. If a user **DOES NOT** specify a preferred contact time, the system sends daily text or phone requests during the “Afternoon” contact times until otherwise specified.

- **Email:** The system will send messages in approximately 24-hour cycles starting at the time of enrollment. A monitoree or head of household reporter will select which symptoms, if any, they or household members are experiencing. If a monitoree’s preferred contact method is changed to **“E-mailed Web Link”** after enrollment, the timing of the 24-hour cycle may vary.
- **SMS (web-link or text):** Daily symptom report messages will be sent once a day starting with the first preferred contact time period after the initial welcome message has been sent
 - Example: If a monitoree is enrolled at 4 pm EST on June 1, but their preferred contact time is morning, they will receive a welcome message at 4 pm EST on June 1, and then daily symptom report messages every day they are eligible between 8 am – noon EST starting on June 2.
 - Example: If a monitoree is enrolled at 4 pm EST on June 1, but their preferred contact time is evening, they will receive a welcome message at 4 pm EST on June 1, and then daily symptom report messages every day they are eligible between 4 pm – 8 pm EST starting on June 1.
 - **NOTE:** For SMS-Text, if the monitoree does not respond to their daily report after 18 hours, the system will log a failed contact attempt in the record History. This **does not** represent a second attempt to contact the user.

Summary of Messages Sent to Monitorees

- **Telephone Call:** If enrollment occurs during the monitoree's preferred contact time, the system will send daily report messages every day starting at time of enrollment. If enrollment occurs outside of the monitoree's preferred contact time, the system will send out daily report messages every day starting during the next preferred contact time period.
 - Example: If a monitoree is enrolled at 4 pm EST on June 1, but their preferred contact time is morning, they will receive daily symptom report messages every day they are eligible between 8 am – noon EST starting on June 2.
 - Example: If a monitoree is enrolled at 4 pm EST on June 1, but their preferred contact time is evening, they will receive daily symptom report messages every day they are eligible between 4 pm- 8 pm starting on June 1.

6.2.4 Daily Symptom Report Reminder Messages by Preferred Reporting Method (SMS and Phone Only)

Daily symptom report reminders are sent to monitorees or heads of households where telephone or SMS-based preferred reporting methods are selected to improve reporting response rate.

- **SMS** (web-link or text): If a monitoree does not reply to the daily report notification, the system will send out up to 3 reminder text messages asking the monitoree to complete the report. The reminder messages will only be sent if it is during the monitoree's designated preferred contact time.
- **Telephone Call:** Reminder calls are sent to monitorees once an hour during their preferred contact period until a valid response is logged by the system that day; the monitoree may receive up to 4 call attempts during their preferred contact method if they do not respond.
 - If the system does not understand the monitoree or the monitoree responds using different words than “Yes” or “No”, the prompt will be repeated a few times to attempt to collect a valid response before disconnecting. In this scenario, the monitoree will be considered “non-reporting”.
- **Email:** No reminder messages are sent to monitorees who prefer email if they do not respond to the daily email within a set period of time; monitorees will receive one email message from the system approximately every 24 hours.

6.3 Submitting Daily Reports to Sara Alert™

Monitorees should be informed what trusted phone number or email sender to expect the daily report messages to come from. To reduce the chance of any successful spoofing attempts, monitorees should be reminded that Sara Alert™ messages will only ask if a monitoree (and any household members) are or are not experiencing symptoms and related questions added by jurisdictions. Sara Alert™ will never ask for other sensitive information, including social security number, account numbers, passwords, or security question responses.

1) Monitorees will access their Daily Report using the notification received via their preferred reporting method (e.g., email link, SMS, phone). The notification will not include the monitoree's name, but will identify them by their **first initial, last initial, and age**.

- The notifications will be sent according to the primary language settings for the monitoree (available on the Monitoree Identification enrollment screen).
- Email notifications will always come from the same email address. The trusted email address is shared with jurisdictions at the time of onboarding.

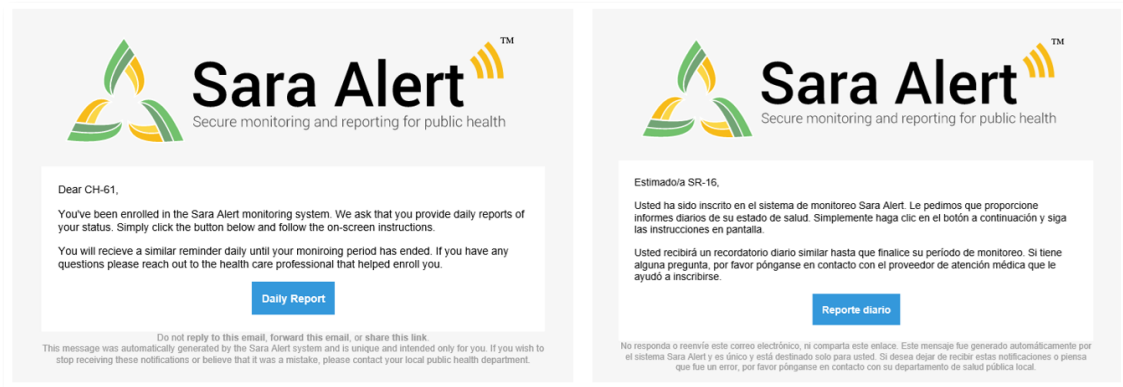


Figure 38: Example Sara Alert™ Welcome Email in English and Spanish

- SMS text messages and phone calls will always come from the same phone number. The trusted phone number is shared with jurisdictions at the time of onboarding with jurisdictions.

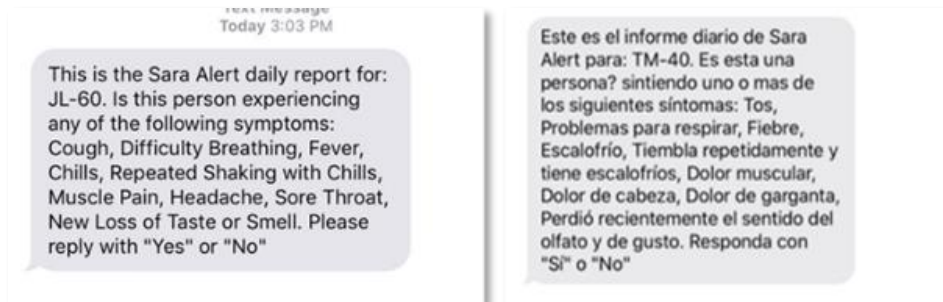


Figure 39: Example SMS text message in English and Spanish from Sara Alert™

2) Monitoree or Head of Household reporter will respond to appropriate prompts.

- **Phone/ SMS Text:** Monitoree will reply “yes” or “no” to list of symptoms. If monitoree is a HOH, one report is sent for all household members if any household member is experiencing symptoms, the HOH should indicate “yes”.
- **Web-link text or email:** Monitoree will indicate which symptoms, if any, from a list they are experiencing. If a monitoree is experiencing no symptoms, they may select “*I am not experiencing any symptoms*”, or simply click “submit” without selecting any symptoms. If monitoree is a HOH, different web-links are sent for each household member; the HOH should complete the daily report for each individual household member using the report identifier (first initial, last initial – age) to determine which report belongs to each member.

Figure 40: Web-link daily self-report monitoree interface in English and Spanish

3) Sara Alert™ will confirm submission.

Figure 41: Web-link Daily report confirmation

Submitting Daily Reports to Sara Alert™