



**Sara Alert**  <sup>TM</sup>  
Secure monitoring and reporting for public health

# User Guide

Software Version 1.15  
October 27, 2020

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# 1 CAPABILITY INDEX BY ROLE

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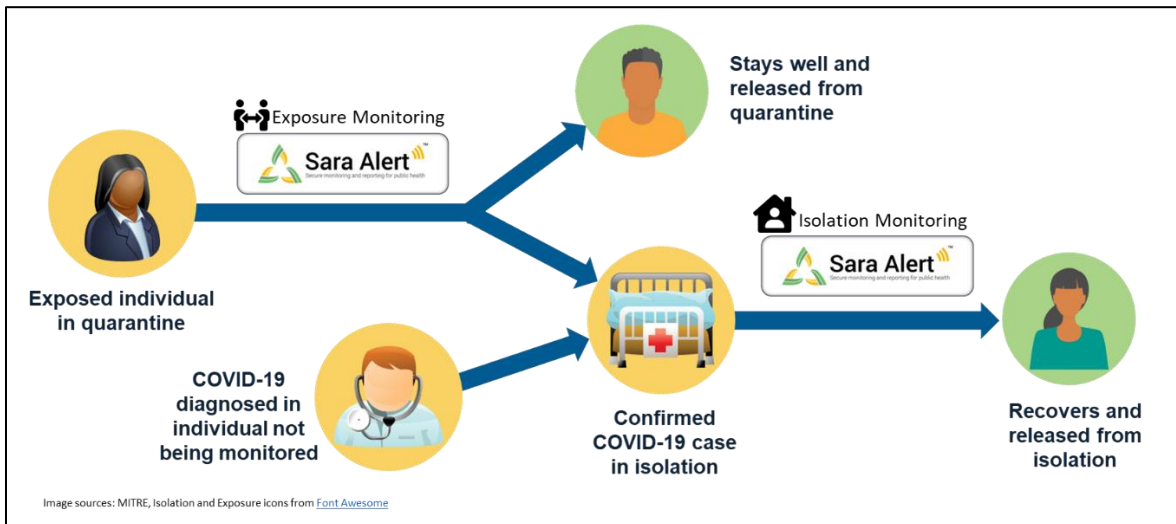
## 2 ABOUT SARA ALERT™

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 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.

### 2.1 Concept of Operations



**Figure 1: Sara Alert™ Concept of Operations**

## 2.2 Workflow Summary

The Sara Alert™ system contains two parallel public health workflows that track two types of monitorees shown in Figure 2:

- **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. This workflow is described in more detail starting on **page 27**.
- **Isolation Monitoring Workflow:** allows public health to monitor cases daily to determine when they preliminarily meet the recovery definition and it may be safe to discontinue home isolation. This workflow is described in more detail starting on **page 31**.

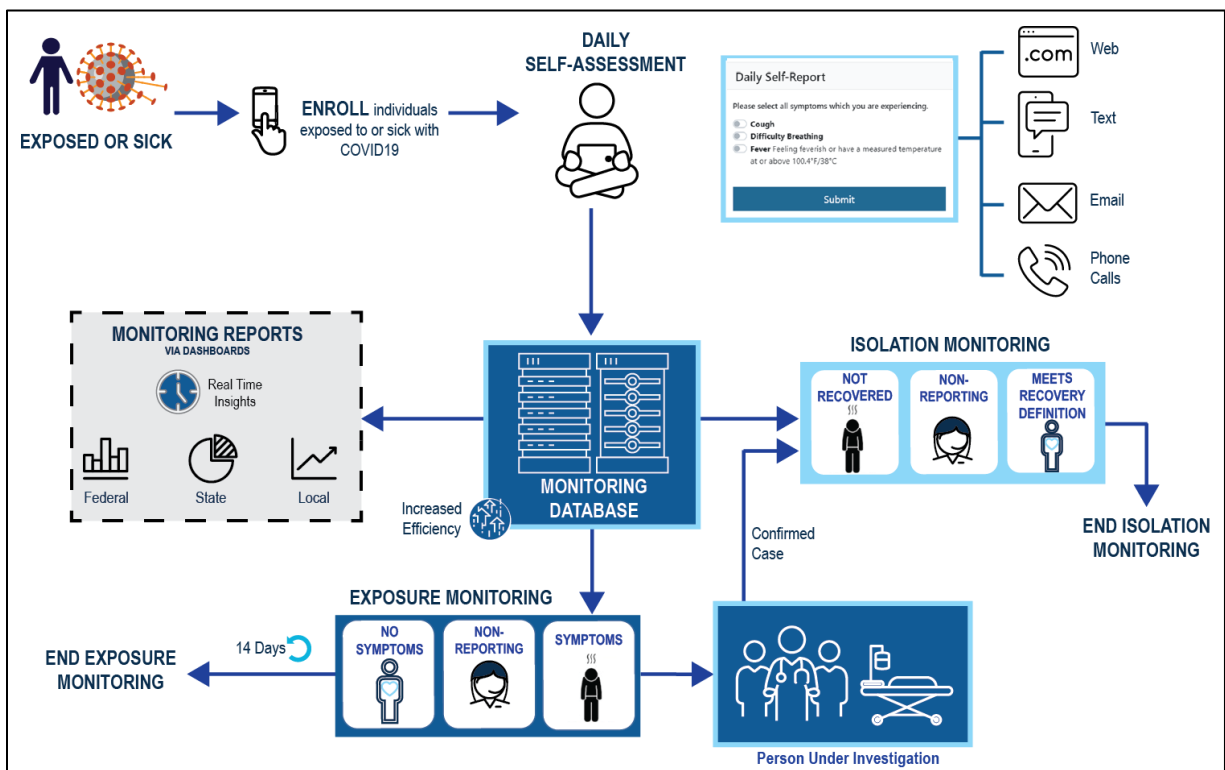


Figure 2: Sara Alert™ Workflow Summary

Visit [saraalert.org](https://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](mailto:sarasupport@aimsplatform.com).

## 2.3 SMART on FHIR API

To support interoperability and exchange of information with other information technology (IT) systems, the Sara Alert™ system has implemented an Application Programming Interface (API) using SMART on HL7 Fast Healthcare Interoperability Resources (FHIR) API standards and specifications.

Additional standards used to support the API include:

- [FHIR Release 4 \(R4\)](#), its components, and specifications
- [SMART application launch framework](#)
- C# FHIR [library](#)
- OAuth 2.0

The Sara Alert™ API documentation is available to users on GitHub [here](#).

### 2.3.1 Get Started Using the API

No matter the workflow, in order to use the Sara Alert™ API and ensure security of application data, the client must go through a three-step process before reading or writing any data.

1. **Registration:** Register as a Client Application with Sara Alert™ (one-time step) by emailing [sarasupport@aimsplatform.com](mailto:sarasupport@aimsplatform.com) to request access. The registration process allows Sara Alert™ to pre-authorize and curate the clients that will be using the Sara Alert™ API. Registration is a manual step, as is [traditional](#).
2. **Authorization:** Go through an authorization process to obtain access token for API requests.
3. **Authentication:** Use the obtained access token to make API requests to the Sara Alert API.

### 2.3.2 Supported Workflows

Sara Alert currently supports two different workflows for API use. Both of these workflows are [SMART-on-FHIR standards](#).

1. [SMART on FHIR App Launch Framework "standalone launch"](#). This expects and requires a user in the loop. For Sara Alert™, this means that a user must be logged in to the Sara Alert™ User Interface, which requires 2 factor-authentication to have been completed (See **page 11**). After an application is authorized, users must individually be given "API access" by their local jurisdiction administrators. Please contact your local administrator to be granted this access.
2. [SMART on FHIR Backend Services](#). This is complementary to the above flow and does not require a user in the loop.

### 3 ROLE OVERVIEW

A user may be assigned one of the roles below by their local administrator. Each user’s role is linked to a unique email address.

**Table 1. Functional Summary by Role**

Role	Enroll New Exposed Monitoree	Enroll New Case	Add Close Contacts	Enroll Close Contacts	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
Public Health			✓		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓			All records in jurisdiction
Public Health Enroller	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓			All records in jurisdiction
Analyst														✓			Can view aggregate data only
Administrator															✓	✓	None; manages users in jurisdiction

#### 3.1 Enroller Role

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](#)

##### 3.1.1 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.



### 3.1.2 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

### 3.1.3 Workflow

- Enrollers can enroll monitorees into the exposure workflow
- Enrollers can enroll cases into the isolation workflow

## 3.2 Public Health Role

A Public Health user is a trusted user who can manage the daily public health monitoring of enrolled monitorees in both the exposure and isolation workflows.

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**TIP:** See the [Quick Start Guide for Public Health Users](#)

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### 3.2.1 Record Access

- A public health user can only access records associated with their assigned jurisdiction.
- A public health user can view all data elements associated with a record.
- At the time of record import, the system will check for potential duplicate records among records that the user has access to; for public health users, this is records within the user’s assigned jurisdiction.

### 3.2.2 Public Health User Capabilities

- Toggle between the Exposure Monitoring and Isolation Monitoring workflows
- View monitoring line list of monitorees in assigned jurisdiction
- View enrollment details of monitorees in jurisdiction, including contact and exposure information
- Modify enrollment details of monitorees in jurisdiction
- Move exposed monitorees between exposure workflow line lists
- Move monitorees who are confirmed cases between isolation workflow line lists
- View monitoree daily symptom reports
- Modify monitoree daily symptom reports (if required to correct entry errors)
- Add exposed monitoree and case symptom reports on behalf of monitorees (for those who are unable or choose not to report electronically)
- Add comments to a monitoree’s record
- Document public health actions (e.g., referral to care or for testing)
- Transfer monitorees to a new jurisdiction

- End monitoring period
- View and export analytics summary for monitorees in the user’s jurisdiction, and the total number of active monitorees in each state and insular jurisdiction
- Batch import new monitorees from an Epi-X notification spreadsheet or using the Sara Alert™ Format Template
- Export monitorees records
- Add a list of close contacts for a monitoree

### 3.2.3 Workflow

- Can move exposed monitorees through the exposure workflow and into the isolation workflow if becomes a case
- Can import a list of exposed monitorees into the exposure workflow or a list of cases into the isolation workflow

## 3.3 Public Health Enroller Role

A Public Health Enroller is a trusted user who **has the combined capabilities of both the enroller and public health roles** (see capabilities of these roles described above). This role should be assigned only if a user needs to perform the duties of both roles.

### 3.3.1 Workflow

- Can move exposed monitorees through the exposure workflow and into the isolation workflow
- Can import a list of exposed monitorees into the exposure workflow or a list of cases into the isolation workflow
- Can manually enroll monitorees into either workflow through the user interface
- Can enroll an individual documented in a record’s list of Close Contacts as a monitoree in Sara Alert™

## 3.4 Analyst Role

An Analyst is a trusted user who can view the analytics summary but has no other capabilities of a public health user.

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

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### 3.4.1 Record Access

- Analysts cannot see individual monitoree record details
- Analysts can view aggregated monitoring and epidemiological data for their assigned jurisdiction (e.g., local, state, nationwide)
- Analysts can view a map summarizing the total number of all active monitorees in Sara Alert™ by workflow according to the specified home address state
- Analysts can view a map summarizing the total number of active monitorees by workflow *within their assigned jurisdiction* according to the specified home county by clicking on maps to zoom
  - An analyst cannot view county-level data for all records

### 3.4.2 Analyst Capabilities

- View and export analytics

### 3.4.3 Workflow

- Analytics are generated using data from both the exposure and isolation workflows.

## 3.5 Administrator Role

An administrator is a trusted user who can manage other Sara Alert™ users.

### 3.5.1 Record Access

- An administrator cannot see individual monitoree record details or the analytics summary.

### 3.5.2 Administrator Capabilities

- Add new users
- Assign jurisdiction to users
  - A local administrator can only assign users to a jurisdiction that the administrator has access to.
- Assign user roles (enroller, public health, public health enroller, analyst, or admin)
  - User roles are linked to a unique email address, so a user may only be assigned one role, unless a user has more than one unique email address
- View list of users within assigned jurisdiction
- Lock or unlock user accounts
- Reset user passwords
- Edit user information
- Manage two-factor authentication
- View System ID for users

## 3.6 Monitoree

A monitoree is a subject with potential exposure (exposed monitoree) or disease (case) who has been enrolled by a trusted user for public health monitoring. The system will send a request for a daily symptom report via the monitoree's or case's preferred reporting method. A monitoree will not have a system login.

### 3.6.1 Record Access

- A monitoree does not have access to any record information; monitorees can only see and respond to the daily symptom report
- A monitoree cannot edit data associated with their or any other record

### 3.6.2 Monitree Capabilities

- Submit daily reports for themselves
- Submit daily reports on behalf of their reporting household members if they are enrolled as the Head of Household

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

## 4 GETTING STARTED

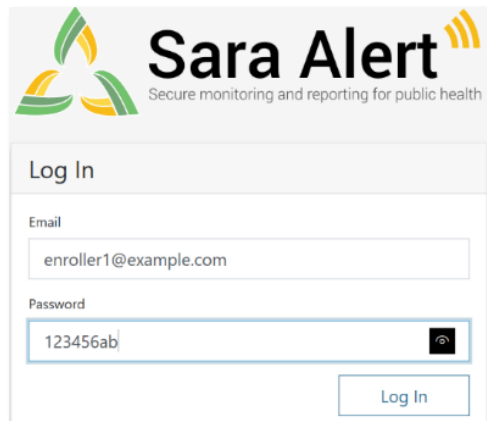
### 4.1 Logging In

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**

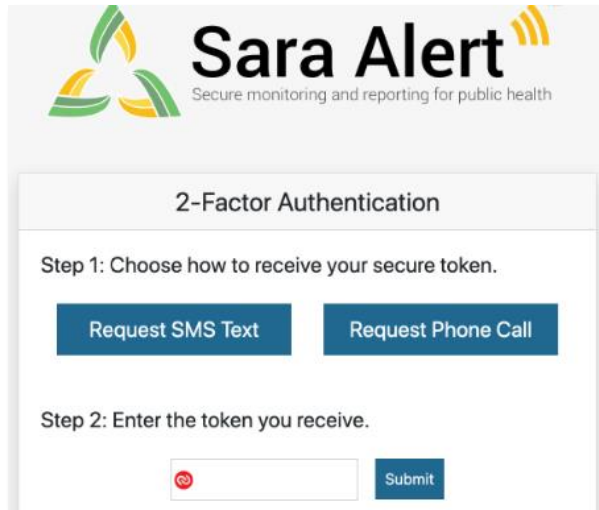
3) Register for two-factor authentication (2FA) by providing a phone number. (**NOTE:** this is only required the first time you use Sara Alert™). This is how you will receive your 7-digit 2FA token number. Once you have entered your phone number and country (for the country code), click “**Register**”.



**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”

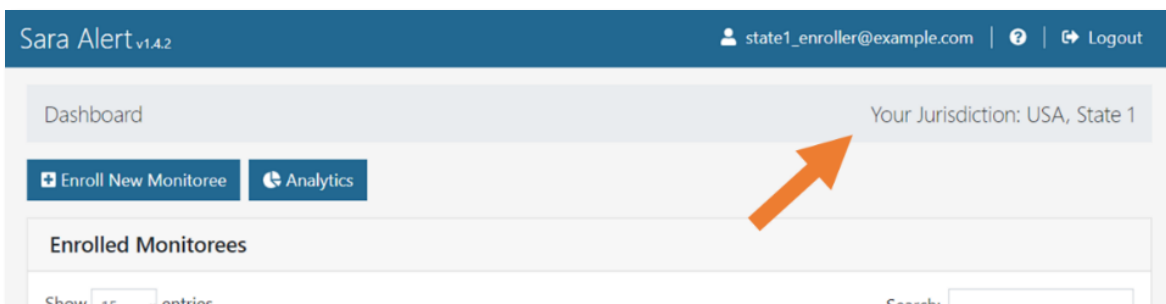


**Figure 5: Choose your 2FA method**

5) Depending on your assigned system role, you will be taken to a different home screen:

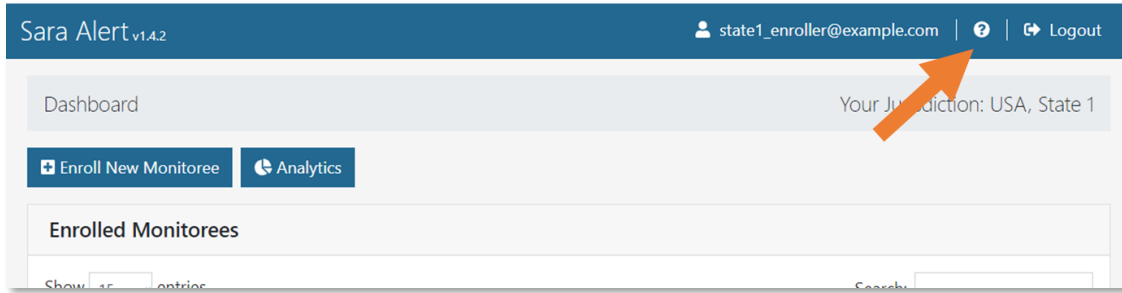
- **Enroller:** Enrollment Dashboard
- **Public Health or Public Health Enroller:** Monitoring Dashboards
- **Analyst:** Analytics Summary
- **Administrator:** Admin Panel

6) Your assigned jurisdiction is listed in the upper right-hand corner of the screen. Your record view is restricted to what you have access to based on your assigned role (See Role Overview starting on page 7).



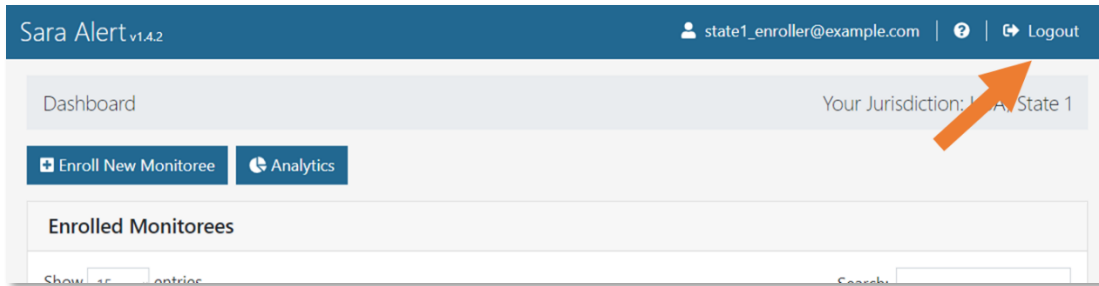
**Figure 6: Your Sara Alert™ jurisdiction**

7) The “**Help**” button provides links to the User Guide, User Forum, 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.

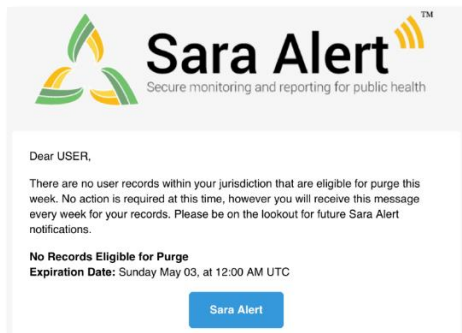


**Figure 8: The logout button**

## 4.2 Sara Alert™ Record Retention

To minimize the amount of identifiable information stored on the production servers, Sara Alert™ will **purge records of identifiers** if there have been no changes to a record for a defined time period, provided that a monitoree is no longer being actively monitored. For COVID-19, the time has been configured for 14 days after the last record update (e.g., an update includes any action on the record, including adding comments or updating any fields). All records that have met the purge criteria since the last system purge date will be eligible for purge unless the record is updated. The expected purge date for a record is displayed on the closed line list. If a jurisdiction would like to retain the records, users will need to select “**Export for Purge Eligible Monitorees**”.

On **Thursdays at noon UTC**, the system will flag all records that are forecasted to be eligible to be purged of identifying information on Saturday at 11:59 pm UTC (i.e. records that at Saturday 11:59 UTC would have not been updated for 14 days). An email notification will be sent to local administrators indicating how many, if any, purge-eligible records are in the administrator’s jurisdiction. Local administrators will need to coordinate with a public health user to export records for retention before purge if necessary.



**Figure 9: Sample notification to administrators**

The system will purge records flagged Thursday on **Saturday at 11:59 pm UTC**. If a record flagged for purge is updated before Saturday at 11:59 pm UTC, the record will not be purged.

**TIP:** Use an online converter to convert UTC to your local time zone.

The system retains a subset of information after purging identifiers from a monitoree’s record to enable the Sara Alert™ system to aggregate data for all monitorees that have ever been monitored within a jurisdiction. Monitoree records that have been purged of identifiers will no longer appear in the monitoring line lists. The data elements in the table below are kept for each record after purge:

- Age
- Sex
- Race
- Ethnicity
- Assigned jurisdiction
- Address county
- Reason for closure
- Date of last exposure
- Assigned monitoring plan
- Symptom report history
- Exposure risk factor categories
- Exposure risk assessment
- Symptom onset date
- Lab result history
- Public health actions
- Isolation workflow flag

## 5 MONITOREE RECORD OVERVIEW

Whenever viewing a specific monitoree record, record information is presented in the six sections described below. Each section of the record can only be viewed by users that have the appropriate role identified below:

- **Monitoree Details** (Enrollers, Public Health, Public Health Enrollers)
- **Monitoring Actions** (Public Health, Public Health Enrollers)
- **Reports** (Public Health, Public Health Enrollers)
- **Lab Reports** (Public Health, Public Health Enrollers)
- **Close Contacts** (Public Health, Public Health Enrollers)
- **History** (Public Health, Public Health Enrollers)

Changes to the data elements in the Monitoree Record may change the line list that the monitoree appears in on the dashboard. Changes are logged in the history section of the record. Some data elements in the monitoree record are used in both workflows while others are more workflow specific. Data elements that are intended for use in a specific workflow are noted in each section below.

A video tutorial for this section is available at: [saraalert.org/public-health/tutorial-videos/](https://saraalert.org/public-health/tutorial-videos/)

### 5.1 Monitoree Details/Enrollment Wizard

The Enrollment Wizard organizes the Monitoree Details into 6 different screens that allow an **Enroller** or **Public Health Enroller** user to add information in a defined sequence. The Enrollment Wizard is used to collect the information described below. While **Public Health** users cannot enroll monitorees, they can access any screen of the enrollment wizard for an existing monitoree to make changes by clicking “(edit details)” at the top of a monitoree’s record (see [page 36](#) for more details). **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.

#### 5.1.1 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. If the language is partially supported, a message will appear on enrollment with more details.



## 5.1.2 Monitree 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

## 5.1.3 Monitree Contact Information

- “**Preferred Reporting Method**” indicates how monitrees 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 monitree’s preferred reporting method is not yet known, the user may select “**Unknown**” and the monitree will not receive notifications. This is the system default value
  - If a monitree is enrolled in the system but has requested not to receive notifications, the user may select “**Opt-Out**” for preferred reporting method and the monitree will not receive notifications
  - Monitrees with “**Opt-Out**” or “**Unknown**” selected will appear on the non-reporting line list the day after enrollment unless a user submits a report on their behalf
- “**Preferred Contact Time**” determines when the monitree will be messaged by the system.
  - 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 monitrees is determined by the monitree’s **address state data element** located on the “Monitree 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

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

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**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 monitree to begin receiving daily notifications.

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

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## 5.1.4 Monitree Arrival Information

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

### 5.1.5 Additional Planned Travel

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

### 5.1.6 Monitree 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.

#### 5.1.6.1 Exposure Workflow

- **Last Date of Exposure:** Used by the system to determine the monitoring period for exposed monitorees. The field will be auto populated with the last date of exposure that was entered when the record was created or imported.
  - A user may enter a date that is up to 30 days after the current date.
  - The system allows either a Last Date of Exposure to be entered OR Continuous Exposure turned ON. This ensures that a user clearly indicates if the monitoring period should be calculated based on a known exposure or extended indefinitely due to an ongoing exposure.
- **Continuous Exposure:** A user can turn this “ON” if the monitree is being continuously exposed (e.g., from living with someone who is a confirmed case).
  - When Continuous Exposure is turned “ON”, Sara Alert™ will extend the monitree’s monitoring period indefinitely until **either:**
    - The record is closed (in which case Continuous Exposure will be automatically turned off); **or**
    - Continuous Exposure is turned off and a Last Date of Exposure is entered by a user. Once a Last Date of Exposure is entered, the end of the monitoring period will be calculated as 14 days after Last Date of Exposure.
  - The system allows either a Last Date of Exposure to be entered OR Continuous Exposure turned ON. This ensures that a user clearly indicates if the monitoring period should be calculated based on a known exposure or extended indefinitely due to an ongoing exposure.
- **Exposure Risk Factors:** Allows users to indicate if a monitree has a specific risk factor
  - 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 monitree 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.)

#### 5.1.6.2 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.
- “**Case Status**” 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>.

### 5.1.6.3 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.

## 5.2 Monitoring Actions

The following data elements can be modified to capture public health monitoring actions and are available to **Public Health** or **Public Health Enroller** users. Assignment of these values should be based on most recent guidance. Any changes to the data elements listed below will be captured in the record history with the name of the user and a timestamp based on the local time zone reported by the user’s web browser.

### 5.2.1 Both Workflows

- **Monitoring Status:** This data element distinguishes between monitorees that are or are not being actively monitored by public health.
  - If set to ‘**Actively Monitoring**’, the system will move the record to the appropriate monitoring line list based on reporting history and latest public health actions. The

- system will send daily report reminders to any active monitoree if they are eligible to receive them (see **page 107**).
- If set to '**Not Monitoring**', the records will be moved to the `Closed` line list and the system will stop sending daily report reminders if the monitoree is not eligible to receive them (see **page 107**).
  - **Case Status:** Allows a public health user to move a monitoree from Exposure Monitoring to the Isolation Monitoring based on case status or vice versa.
    - **Suspect, Not a Case, Unknown:** If one of these case statuses is selected, the record will be retained or returned to the exposure workflow to continue monitoring until the end of the monitoring period.
    - **Confirmed or Probable:** If one these case statuses is selected the system will ask the user if the system should end monitoring or move the record to isolation monitoring.
    - 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>.
  - **Assigned User:** 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.
  - **Assigned Jurisdiction:** Allows public health users to control the jurisdiction who can view and modify the record. Records that have been transferred into or out of a user's jurisdiction will appear on the respective transfer line list.

## 5.2.2 Exposure Workflow

- **Exposure Risk Assessment:** Allows a public health user to document exposure risk. The purpose of this data element is to provide information to public health users who are prioritizing response to symptomatic and non-reporting individuals.
  - This data element does not impact the type or frequency of messages sent by the system to monitorees.
  - Users should assign Exposure Risk Assessment according to current guidelines provided by their jurisdiction.
- **Latest Public Health Action:** Allows a public health user to document public health actions related to a symptomatic monitoree under investigation to determine case status in the exposure workflow. The purpose of this data element is to move records from the symptomatic line list to the PUI line list in the exposure workflow.

- Selecting any option other than “None” moves the record from the “Symptomatic” line list to the “PUI” line list in the exposure workflow.
- To move a record off of the PUI line list in the exposure workflow, update ‘Case Status’ based on the findings of the investigation.
- **Monitoring Plan:** Allows a public health user to document the assigned monitoring plan. The purpose of this data element is to provide information to public health users who are prioritizing response to symptomatic and non-reporting individuals in the exposure workflow.
  - This data element does not impact the type or frequency of messages sent by the system to monitorees.
  - Users should assign Monitoring Plan according to current guidelines provided by their jurisdiction.

## 5.3 Reports

This section lists all of a monitoree’s daily reports, including which (if any) symptoms were reported, the date and time of the report, who submitted the report (i.e., the monitoree or a public health user), and the current notification status (see **page 60** for icon description). Reports are available to **Public Health** or **Public Health Enroller** users. Data elements or features that are intended for use in a specific workflow or function differently in each workflow are noted below.

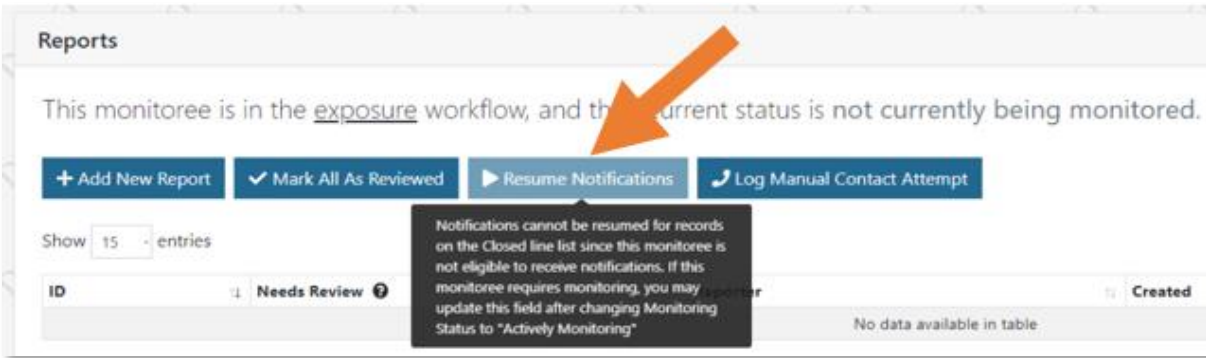
### 5.3.1 Both Workflows

- **Add New Report (Page 79):** Allows a user to add a new symptom report on behalf of a monitoree.
- **Pause/Resume Notifications:**
  - **Pause:** The system will stop sending an eligible monitoree daily symptom report requests until a user resumes notifications. (See **page 107** for eligibility logic).
    - **Household Reporting:** If a user pauses notifications for a Head of Household (HoH), no notifications will be sent to the HoH for **any** household members. Since household members are not eligible to receive notifications (the HoH receives their notifications), the ability to pause notifications is not available for household members who are not the Head of Household.
  - **Resume:** The system will resume sending the monitoree daily symptom report requests once a day until notifications are either paused by a user or the monitoree is no longer eligible to receive messages (See **page 107** for eligibility logic).
    - Resuming notifications may not result in a symptom report being immediately sent to the monitoree. The system will send a symptom report at the monitoree’s next preferred contact time.
  - This ability to pause/resume notifications is only available for monitorees who are:
    - **NOT** on a Closed line list; **AND**
    - Either a Head of Household **OR** not in a household (self-reporter)

---

**Tip:** Clicking “Resume” notifications **will not** immediately send a symptom report to a monitoree. The system will send a message during the next occurrence of the monitoree’s preferred contact time if the monitoree is eligible to receive a message.

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**Figure 10: The ability to pause notifications is not available for records that are ineligible**

- **Log Manual Contact Attempt (Page 78):** Allows public health users to record successful and unsuccessful manual contact attempts made. Users require contact by public health in the following situations: 1) evaluate exposed individuals who have reported symptoms to determine clinical compatibility 2) evaluate cases who preliminarily meets the recovery definition to validate it is safe to discontinue isolation 3) re-establish contact with individuals on the non-reporting line lists.
- **Symptom Onset Date:** This field is auto populated with the date of the earliest report flagged as symptomatic (red highlighted) in the report history table unless a date has been entered by a user (e.g., symptom onset determined to differ from information available in report table); this is to reduce data entry burden on users and prevent the symptom onset date field from being blank when a record is moved to the Isolation Workflow since it is a required field for the non-test based recovery definition. An explanation of the role of this field in each workflow is noted below.
  - A user may enter a date that is up to 30 days after the current date.

### 5.3.2 Exposure Workflow

- **Report Table Format:** If the monitoree reports symptoms that are compatible with symptomatic logic (**page 27**), that row will be highlighted red and the “Needs Review” column will show “Yes” in the exposure workflow.
- **Mark All as Reviewed (Page 70):** Selecting this button will change the "Needs Review" status in all unreviewed reports from "Yes" to "No". The purpose of this button is move records from the symptomatic line list that are not clinically compatible with the disease of interest to the **Asymptomatic** or **Non-reporting line** list as appropriate in the exposure workflow. If a report is marked as reviewed, the system will clear the positive symptom report flag on the record. Reports may also be individually cleared. This feature also determines the system-defined symptom onset date.
- **Symptom Onset Date:** If this field has a value in the Exposure workflow, the monitoree will appear on the **Symptomatic** line list.
  - A monitoree with a blank symptom onset date in this workflow is eligible to appear on the Asymptomatic or Non-Reporting line lists. Users should verify the symptom onset date before moving a record to the isolation workflow.
  - A symptom onset date should only be entered by a user for a monitoree in the Exposure Workflow if the monitoree is under investigation for the disease of interest

- and the actual symptom onset date differs from what data is available in the reports table (see **page 72** for more details).
- If all symptomatic reports (highlighted red) are marked as reviewed while a record is in the exposure workflow, the symptom onset date will be blank since the monitoree has no known symptom onset date for the disease of interest.
  - **Last Date of Exposure:** Used by the system to determine the monitoring period for exposed monitorees. The field will be auto populated with the last date of exposure that was entered when the record was created or imported.
    - A user may enter a date that is up to 30 days after the current date.
    - The system allows either a Last Date of Exposure to be entered OR Continuous Exposure turned ON. This ensures that a user clearly indicates if the monitoring period should be calculated based on a known exposure or extended indefinitely due to an ongoing exposure.
  - **End of Monitoring:** Calculated from last date of exposure
  - **Continuous Exposure:** A user can turn this “ON” if the monitoree is being continuously exposed (e.g., from living with someone who is a confirmed case).
    - When Continuous Exposure is turned “ON”, Sara Alert™ will extend the monitoree’s monitoring period indefinitely until **either**:
      - The record is closed (in which case Continuous Exposure will be automatically turned off); **or**
      - Continuous Exposure is turned off and a Last Date of Exposure is entered by a user. Once a Last Date of Exposure is entered, the end of the monitoring period will be calculated as 14 days after Last Date of Exposure.
    - The system allows either a Last Date of Exposure to be entered OR Continuous Exposure turned ON. This ensures that a user clearly indicates if the end of monitoring period should be calculated based on a known exposure or extended indefinitely due to an ongoing exposure.

### 5.3.3 Isolation Workflow

- **Report Table Format:** If the monitoree reports symptoms that are compatible with symptomatic logic (**page 27**), that row will be highlighted red. The “Needs Review” column is not visible in the isolation workflow since cases are expected to report symptoms for some time during recovery.
- **Mark All As Reviewed:** The “Review” functionality is not used or available in the Isolation Workflow. This feature is used to mark symptom reports as not being related to the disease of interest in the exposure workflow.
- **Symptom Onset Date:** This field is used in the isolation workflow to determine if the *non-test-based* recovery definition has been met which will determine if a record is eligible to appear on the Records Requiring Review line list (**page 31**) .
  - If a record is moved from the Isolation Workflow to the Exposure Workflow (e.g., case ruled out and returned to monitoring due to exposure), the system will clear this field; this allows the system to place a monitoree on the appropriate monitoring line list in the exposure workflow based on any new symptom reports received.

- **Extend Isolation To Date:** This field is used by the system to determine if a monitoree in the Isolation Workflow is eligible to appear on the **Records Requiring Review** line list (**page 31**). If this field is future dated then the monitoree will be eligible to appear on definition is met (**page 75**). If this field is dated with a past date, then the case will be eligible to appear on the **Record Requiring Review** line list once a recovery definition has been met.
  - A user may enter a date that is between 30 days before and 30 days after the current date.
  - There is no set monitoring period for cases in the Isolation Workflow. Instead, the system automatically flags monitorees as potentially meeting one of Sara Alert’s internal recovery definitions (see **page 31**). A user can override this by extending isolation, as explained on **page 75**.

### 5.3.4 Symptom Report Information Display Based on Monitoree Preferred Reporting Method

Monitorees receive slightly different automated symptom report prompts depending on their preferred reporting method. We encourage users to promote contact methods that send monitorees a web-based link (via email or SMS) during onboarding, since more granular information about symptoms can be collected.

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

#### 5.3.4.1 For web-based links (via SMS or email) and reports entered manually by a Sara Alert™ user:

Monitorees who are not a member of a reporting household respond to a **series of yes/no questions** about presence or absence of **each** of the monitored symptoms.

- The report will explicitly document which symptom(s) a monitoree reported or did not report (e.g., every symptom column will be populated with “yes” or “no”)
  - If at least one symptom is checked, the appropriate column displays “Yes”, the report is shaded red and “Needs Review” is set to “Yes”
  - If no symptoms are checked, the symptom columns are filled with “No” and the report is not highlighted in red

If a **monitoree is a head of household (HoH) reporter**, they will receive unique web-links to report symptoms for each household member. Each household member’s symptom table will reflect what is reported specifically for them.

This monitoree is in the *exposure* workflow, and their current status is *symptomatic*. This monitoree's notification status is

+ Add New Report   ✓ Mark All As Reviewed   || Pause Notifications   🗨 Log Manual Contact Attempt

Show 15 entries   Search Reports:

ID	Needs Review	Reporter	Created	Cough	Difficulty Breathing	Fever	Used A Fever Reducer	Chills	Repeated Shaking With Chills	Muscle Pain	Headache	Sore Throat	New Loss Of Taste Or Smell	Actions
477	Yes		2020-08-11 01:12 EDT	No	No	Yes	No	Yes	No	Yes	Yes	No	Yes	

**Figure 11: Example symptomatic web-link report showing value for each symptom**



### 5.3.4.2 For SMS Text and Voice:

Monitorees who are not a member of a reporting household respond to a **single yes/no question** about presence or absence of **the group of monitored** symptoms.

- If monitoree replies “yes”, the report is shaded red and the monitoree is moved to the symptomatic line list; the symptom column values are left blank since the system does not know which symptom the monitoree is reporting, but knows at least one has been reported. This is enough information to flag report for follow-up.
- If a monitoree responds “no”, the symptom columns are filled with “No” and the monitoree is moved to the appropriate line list.

If a **monitoree is a HoH reporter**, they will respond to one question asking if anyone in the household is experiencing symptoms.

- If HoH replies “yes”, the report for every household member is shaded red and every member of the household is moved to the symptomatic line list since the system does not know which household member is ill; the symptom column values are left blank since the system does not know which symptom the HoH is reporting, but knows at least one has been reported. This is enough information to flag the report for follow-up. The records of each household member should be updated once additional information is available.
- If a HoH responds “no”, the symptom columns are filled with “No” and all the household records are moved to the appropriate line list

This monitoree is in the exposure workflow, and their current status is **symptomatic**. This monitoree's notification status is

[+ Add New Report](#) [✓ Mark All As Reviewed](#) [|| Pause Notifications](#) [📞 Log Manual Contact Attempt](#)

Show  entries Search Reports:

ID	Needs Review	Reporter	Created	Cough	Difficulty Breathing	Fever	Used A Fever Reducer	Chills	Repeated Shaking With Chills	Muscle Pain	Headache	Sore Throat	New Loss Of Taste Or Smell	Actions
474	Yes	Monitoree	2020-08-11 01:10 ED											

**Figure 12: Example symptomatic SMS text or voice report with blank columns.**

## 5.4 Lab Results

Lab Results are primarily used in the Isolation Workflow to determine if a monitoree meets the asymptomatic or test-based recovery definition (**page 31**), but test results may be entered whenever a monitoree is in either workflow.

**A public health user will need to validate that any lab results documented meet specific criteria for recovery (e.g., 24 hours apart, approved test method) according to the latest guidance.**

A Public Health or Public Health Enroller user may add the following lab results for a monitoree (**Page 83**):

- **Lab Test Type:** PCR, Antigen, or Antibody (IgG, IgM, IgA)
  - Provides information for users to review to determine if documented Lab Test Type is confirmatory, supportive, or other. The system **does not** use values in this field to determine eligibility for the Records Requiring Review line list in the isolation workflow. This is to: 1) increase sensitivity of the recovery logic and 2) allow for

expert review of cases based on latest guidance (which may change between software releases).

- **Specimen Collection Date:** When the specimen was collected
  - The system uses values in this field to determine if a monitoree meets the *asymptomatic* recovery logic to determine eligibility for the **Records Requiring Review** line list in the isolation workflow.
- **Report Date:** Date the results were reported
  - The system **does not** use values in this field to determine eligibility for the Records Requiring Review line list in the isolation workflow.
- **Result:** Positive, Negative, Indeterminate, Other
  - The system uses values in this field to determine if a monitoree meets either the *asymptomatic* or *test-based recovery* logic to determine eligibility for the **Records Requiring Review** line list in the isolation workflow.

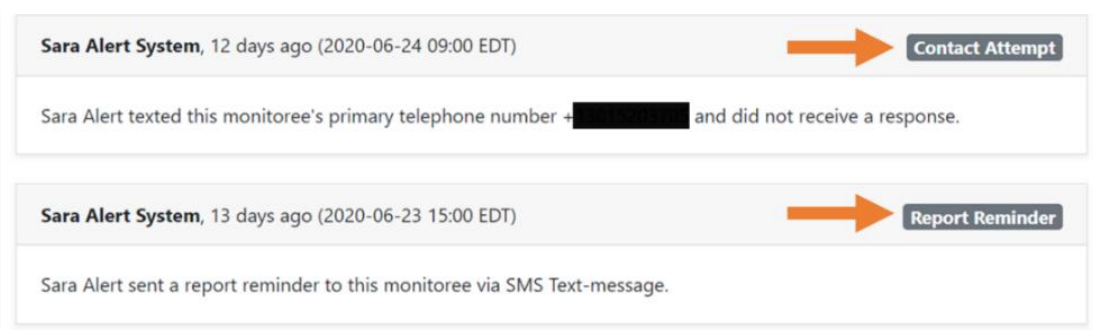
## 5.5 Close Contacts

This section is used to document a list of close contacts associated with a monitoree and is available to **Public Health** or **Public Health Enroller** users. These contacts may be identified during an interview with a case. Sara Alert™ allows public health users to quickly document basic information about these close contacts. These close contacts can then be later enrolled into the system for monitoring after information required for enrollment is collected.

**NOTE:** Public health users do not have the ability to **enroll** individuals directly from the close contacts lists. Only Public Health Enrollers have this ability. See **page 95** for more details.

## 5.6 History

This section includes a history of changes made to the record by users, automated system actions, and comments added by users and is available to **Public Health** or **Public Health Enroller** users. Record actions are tagged by type. The history section records the user who made the change and the date and time it occurred. The date/time is displayed in the time zone of the user’s web browser.



**Figure 13: Sara Alert™ may create multiple history items per contact attempt**

### 5.6.1 History Tag Type Descriptions

- **Record Edit:** Notes any changes made to a Monitoree’s Details (i.e. DOB, Age, Language, etc)
- **Report Created:** Notes when a user added a symptom report
- **Report Updated:** Notes when a user made modifications to an existing symptom report
- **Comment:** A comment was added to the record History
- **Enrollment:** Notes the date and time a monitoree was enrolled into the system
- **Monitoring Change:** Notes any changes to the Monitoring Actions in the record, or if notifications were paused (i.e. Monitoring Status, Symptom Onset, Last Date of Exposure etc.)
- **Monitoree Data Downloaded:** Notes when a user downloaded a monitoree’s data and which export template was used
- **Reports Reviewed:** Notes when the “**Mark All As Reviewed**” button was used in the Exposure workflow Reports section
- **Report Reviewed:** Notes when a user marked a single symptom report as “Reviewed”
- **Report Note:** Notes when a user added a note to a symptom report
- **Lab Result:** Notes when a lab result was added to the monitoree’s record
- **Lab Result Edit:** Notes when a lab result was edited in a monitoree’s record
- **Report Reminder:** Notes when the system sent a notification to a monitoree
- **Contact Attempt:** Notes that the system sent a notification to a monitoree but did not receive a response. More information on this history tag is included below.
- **Welcome Message Sent:** Notes the date and time the initial Sara Alert welcome message was sent to the monitoree (only for monitorees whose preferred reporting method is email)
- **Record Automatically Closed:** Notes the date and time the record was automatically closed by the system

### 5.6.2 Timing of Report Reminder and Contact Attempt History Entries

For monitorees reporting via SMS-Text Message or Telephone Call, there is a delay between when the symptom report was sent to the monitoree (“**Report Reminder**”) and when the failed contact attempt is documented (“**Contact Attempt**”). This gives the monitoree time to respond.

- **SMS-Text Message:** “Contact Attempt” failed message posted 18 hours after report reminder sent
- **Telephone Call:** Contact attempt failed message posted 1 hour after report reminder sent

If a monitoree is set to receive SMS-Text Messages and their preferred contact time is “Morning,” the following scenario might occur:

- The system sends the monitoree a text message at 10am with the daily symptom report
- The system adds a “**Report Reminder**” entry to the record history to show a SMS Text-message was sent (with a 10am timestamp)
- The monitoree does not respond to the daily report within **18 hours**
- At 4am **the next day**, the system adds a “**Contact Attempt**” entry to the record history, indicting the monitoree did not respond to the reminder sent at 10am the previous day.

**NOTE:** Sara Alert™ will never call or text a monitoree before 8am or after 8pm local time.

## 6 EXPOSURE WORKFLOW LINE LIST OVERVIEW

Exposed monitorees appear on different line lists (accessed by tabs at the top of the dashboard) in the Exposure Workflow based on the following criteria described in more detail below:

- Monitoring Status
- Content of Daily Symptom Report
- Time since Last Report Submission
- Latest Public Health Action
- Changes to Assigned Jurisdiction

Monitorees on the line lists below may receive messages from the system; eligibility criteria are described on **page 107**. The timing of these messages is described on **page 110**.

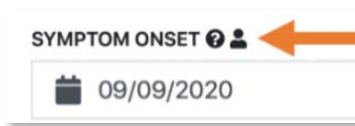
### 6.1 Active Monitoring Line Lists

The active monitoring line lists are for monitorees that the health department is currently monitoring. Records where **Monitoring Status** is set to “**Actively Monitoring**” may only appear on one of the following line lists. Monitorees who require public health follow-up are located on either the **Symptomatic, Non-Reporting**, or **PUI (Person Under Investigation)** line lists. Follow-up with these monitorees should be based on current guidelines and available resources (i.e., CDC, etc.).

#### 6.1.1 Symptomatic Line List

Monitorees who reported symptoms that require review by a public health user to determine if disease is suspected; requires public health follow-up. The system checks the **Symptom Onset Date** field to determine if a monitoree should appear on the Symptomatic line list. If the monitoree has a **Symptom Onset Date** specified, they will appear on the Symptomatic line list. A monitoree’s **Symptom Onset Date** is generated in one of two ways:

- **Used-Defined** if a user manually enters a **Symptom Onset Date** in the record.
  - **IMPORTANT:** A symptom onset date should only be entered by a user in the exposure workflow if the monitoree is under investigation for the disease of interest and the reported symptom onset date differs from what is available in the reports table. If a user sets a symptom onset date in the exposure workflow, the record will appear on the symptomatic line list (see **Page 70**).
  - The system will not overwrite or clear (if the “Review” function is used) a symptom onset date manually entered by a user while the record is in the exposure workflow or if the record is moved to the isolation workflow. If disease is ruled out after investigation and the monitoree should continue to be monitored in the exposure workflow, a user must clear the symptom onset date field to move the record off the **Symptomatic** line list.
  - A “person” icon indicates that the date is user-defined:



**Tip:** Any changes to the “Symptom Onset Date” by the system or a user will be captured in the record “History” and tagged as a “Monitoring Change.”

**Figure 14: A person icon indicates that the date is user-defined**

- **Auto-Populated** by the system as the date of the earliest report that needs review because the report submitted meets the symptomatic logic (unless a date was specified by a user).
  - The symptomatic logic is configured at the system level and conforms to the latest guidance. For COVID-19, the logic is currently based on [CSTE position statement Interim-20-ID-02](#).
  - A report is flagged by the system as meeting the symptomatic logic if the following symptoms are reported:
 

**One or more of the following:**

    - Cough
    - Difficulty Breathing
    - New Loss of Taste
    - New Loss of Smell
    - Shortness of Breath

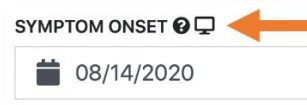
**OR at least two of the following:**

    - Chills
    - Congestion or Runny Nose
    - Diarrhea
    - Fatigue
    - Fever
    - Headache
    - Muscle Pain
    - Nausea or Vomiting
    - Repeated Shaking with Chills
    - Sore Throat
  - A “computer” icon indicates that the date is auto-populated by the system.

---

**Tip:** For monitorees who were enrolled in Sara Alert before v1.12 (9/10/20), New Loss of Taste and New Loss of Smell appear as a single column in the Reports table as “New loss of taste or smell.”

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**Figure 15: A computer icon indicates that the date was auto-populated by the system**

**NOTE:** To learn more about the “Review” functionality and how to move a record off of the symptomatic line list, please see **page 70**.

### 6.1.2 Non-Reporting Line List

Monitorees who have not submitted a symptom report within the expected time period (e.g., 24 hours) **and** do not have a **Symptom Onset Date**; require public health follow-up.

### 6.1.3 Asymptomatic Line List

Monitorees who submitted a report within the expected time period (e.g., past 24 hours) **and** do not have a **Symptom Onset Date**; do not require public health follow-up unless otherwise indicated. Monitorees who submit a report indicating they are not experiencing symptoms on their last day of monitoring (e.g., eligible to appear on the Asymptomatic line list) are automatically moved to the Closed line list by the system. The reason for closure will appear as “Completed Monitoring (system)”. See **page 30** for more information on system closed records.

### 6.1.4 PUI Line List

Monitorees currently under investigation by public health to determine case status. Monitorees on the PUI line list will receive messages from the system. Since public health will be actively investigating and communicating with this individual, the monitoree may receive a system notification and be contacted directly by the health department on the same day.

## 6.2 Closed Line List

The closed line list is for monitorees who are no longer being monitored (e.g., completed monitoring period, lost to follow-up, etc.) by public health. A monitoree on this line list will not appear on any Active Monitoring line lists. Records where **Monitoring Status** is set to “**Not Monitoring**” appear on this list.

- Records on the closed line list that have not been updated for 14 days will be purged. The closed line list shows the expected purge date (see **page 14**). These records can be exported if that information needs to be retained (see more info about exporting purge eligible monitorees on **page 48**).
- Records on this line list are accessible to users until purged. Monitorees that may require additional monitoring can be moved back to an Active Monitoring line list by setting the Monitoring Status back to “Actively Monitoring”.

### 6.2.1 User Selected Reasons for Closure (Both Workflows)

Whenever a record is manually closed by a user, a reason for ending monitoring should be selected. A list of available reasons for closures and suggestions for use are described below:

- **Completed Monitoring:** Select if a monitoree has completed their monitoring according to jurisdiction protocol
- **Meets Case Definition:** Select if the monitoree was confirmed as a case and the user’s jurisdiction is not using Sara Alert™ to monitor cases in the Isolation Workflow.
- **Lost to follow-up during monitoring period:** Monitoree meets jurisdiction criteria for being considered lost to follow-up.
- **Lost to follow-up (contact never established):** Monitoree meets jurisdiction criteria for being considered lost to follow-up and contact was never established.
- **Transferred to another jurisdiction:** Monitoree has been transferred to a jurisdiction that is not participating in Sara Alert™ and the transfer functionality cannot be used.
- **Person Under Investigation (PUI):** Monitoree is a PUI and the user’s jurisdiction manages the investigation in another system.
- **Case Confirmed:** Monitoree meets the confirmed case definition and user’s jurisdiction is not using Sara Alert™ to monitor cases in the Isolation Workflow.
- **Meets criteria to discontinue isolation:** Public health has determined a case in the Isolation Workflow can safely discontinue isolation.
- **Deceased:** Monitoree is deceased.
- **Duplicate:** Identifies a record that is duplicative of another in Sara Alert™. This record is not considered the master record.
- **Other**

## 6.2.2 System Defined Reasons for Closure (Exposure Workflow)

Sara Alert™ automatically moves records in the exposure workflow that meet specific criteria to the Closed line list. The system starts a job every hour (on the half hour) to check for monitorees that meet these criteria. The reason for closure shown on the line list and in the record's history will be appended with "(system)" to clearly identify records closed by the system.

The following list identifies the reasons for closure and the criteria that must be met for the system to close a record automatically:

- **Completed Monitoring (system):** The monitoree submitted a report indicating they were not experiencing symptoms on their last day of monitoring.
- **Enrolled more than 14 days after last date of exposure (system):** The monitoree was enrolled or imported into Sara Alert with a Last Date of Exposure more than 14 days prior to enrollment and Continuous Exposure is not selected. This means that the monitoree was added to Sara Alert after the end of the calculated monitoring period. Since the monitoring period has already passed, the system will close these records. In previous releases, the reason for closure for these records was recorded as "Past Monitoring".
- **Enrolled on last day of monitoring period (system):** The monitoree was enrolled or imported into Sara Alert with a Last Date of Exposure equal to 14 days prior to the enrollment date and Continuous Exposure is not selected. This means that the monitoree was added to Sara Alert on the calculated end of monitoring date. Since a monitoree appears on the Asymptomatic line list immediately after enrollment, the record will meet the criteria for closure described above (e.g., on the asymptomatic line list on the end of monitoring date). The reason recorded for records that meet this criteria differentiates them from records automatically closed for other reasons.

## 6.3 Transfer Line Lists

The transferred line lists are for monitorees where the Assigned Jurisdiction has changed.

- **Transferred In:** Monitorees who were transferred to your assigned jurisdiction by a Sara Alert™ user in a different jurisdiction in the past 24 hours (i.e., due to a monitoree moving inside your jurisdiction from elsewhere).
  - A monitoree on this list will appear on the appropriate Active Monitoring or Closed line list based on record values.
- **Transferred Out:** Monitorees who have been transferred out of your assigned jurisdiction to another jurisdiction participating in Sara Alert™ (i.e., due to a monitoree moving outside your jurisdiction).
  - Users lose access to an individual's records when they are transferred out of their jurisdiction. If you need to maintain complete record data, we recommend exporting records for these individuals before transferring to a new jurisdiction.
  - Records on this list will be purged 14 days after transfer
  - If you need to transfer a record to a jurisdiction that is not participating in Sara Alert™, export the record then close it. Select "Transferred to another jurisdiction" as the reason. These records will not appear on the Transferred-Out line list.

## 6.4 All Monitorees Line List

The **All Monitorees** line list (located on the far right) shows all exposed monitorees in the jurisdiction who are currently in the exposure workflow. Use this view to search across all records in exposure monitoring.

## 7 ISOLATION WORKFLOW LINE LIST OVERVIEW

Monitorees are displayed on different line lists (accessed by tabs at the top of the dashboard) in the isolation workflow based on the following criteria described in more detail below:

- Monitoring Status
- Content of Daily Symptom Report
- Time since Last Report Submission
- Symptom Onset Date
- Lab Test Results
- Changes to Assigned Jurisdiction

---

**Tip:** See the [Possible Scenarios for Isolation Monitoring Quick Start Guide](#)

---

Monitorees on the line lists below may receive messages from the system; eligibility criteria are described on **page 107**. The timing of these messages is described on **page 110**.

### 7.1 Active Monitoring Line Lists

The active monitoring line lists are for cases that the health department is currently monitoring. Records where **Monitoring Status** is set to “**Actively Monitoring**” may only appear on one of the following line lists. Cases who may require public health follow-up are located on either the **Records Requiring Review** or **Non-Reporting** tab. Follow-up with these cases should be based on current guidelines and available resources (i.e., CDC, etc.).

#### 7.1.1 Records Requiring Review Line List

Cases who meet the recovery logic will appear on the Records Requiring Review line list. Any cases that appear on this line list require follow-up by public health to validate that it is safe to discontinue isolation. The system logic has been designed to be sensitive. As a result, cases that that have not recovered completely may appear.

- The recovery logic is configured at the system level and conforms to the latest guidance.
  - For COVID-19, the logic is currently based on the *CDC Guidance for Discontinuation of Isolation for Persons with COVID-19 Not in Healthcare Setting* (updated [July 20, 2020](#)).
- A case meets the criteria to appear on the requiring line list if any of the following conditions are met (logic below is for COVID-19):
  - Symptomatic non test-based recovery definition:
    - >24 hours since last reported fever; **AND**
    - >24 hours since last reported use of fever-reducing medicine; **AND**
    - >10 days since onset of symptoms (based on Symptom Onset Date); **AND**
    - Monitoree has submitted at least one report that is at least 24 hours old; **AND**
    - The **Extend Isolation To** date has passed or is blank.



- Asymptomatic non test-based recovery definition:
  - > 10 days have passed since the Specimen Collection Date of a laboratory test where the result is “positive” **AND**
  - No symptoms have been reported; **AND**
  - Monitoree has submitted at least one report that is at least 24 hours old; **AND**
  - The **Extend Isolation To** date has passed or is blank.
- Test-based recovery definition (not recommended except to discontinue isolation or other precautions earlier than would occur under the symptom-based strategy):
  - Two negative laboratory results documented in “Lab Results” table; **AND**
  - >24 hours since last reporting a fever to the system; **AND**
  - >24 hours since last reporting the use of fever-reducing medicine; **AND**
  - The **Extend Isolation To** date has passed or is blank.

### 7.1.2 Non-Reporting Line List

Cases who have not reported (e.g., presence or absence of symptoms) within the expected time period (e.g., 24 hours) **AND**:

- Have not yet met the recovery definition; **OR**
- Have an **Extend Isolation To** date that has not passed or is blank.

### 7.1.3 Reporting Line List

Cases on this line list typically do not require follow-up. Cases who have reported the presence or absence of symptoms within the expected time period (e.g., 24 hours) **AND**:

- Have not yet met the recovery definition; **OR**
- Have an **Extend Isolation To** date that has not passed or is blank.

## 7.2 Closed Line List

The closed line list is for cases who are no longer being monitored (e.g., met criteria to discontinue isolation, lost to follow-up, etc.). A case on this line list will not appear on any Active Monitoring line lists. Records where **Monitoring Status** is set to “**Not Monitoring**” appear on this list.

- The system does not automatically close out records in the isolation workflow. After a case has met the recovery definition, a public health user must close the record; this ensures that the case has been reviewed to validate the monitoree has recovered.
  - Whenever a record is manually closed by a user, a reason for ending monitoring should be selected. A list of available reasons for closures and suggestions for use is described on **page 29**.
- Records on the closed line list that have not been updated for 14 days will be purged. The closed line list shows the expected purge date (see **page 14**). These records can be exported if that information needs to be retained (See more info about exporting purge eligible monitorees on **page 48**)

- Records on this line list are accessible to users until purged. Monitorees that may require additional monitoring can be moved back to an Active Monitoring line list by setting the Monitoring Status back to “Actively Monitoring”.

## 7.3 Transfer Line Lists

The following line lists are for case where the Assigned Jurisdiction has changed. A case may also appear on the appropriate Active Monitoring or Closed line list based on record values.

- **Transferred In:** Cases who were transferred to your jurisdiction by a Sara Alert™ user in a different jurisdiction in the past 24 hours (i.e., due to a case moving inside your jurisdiction from elsewhere).
  - A case on this list will appear on the appropriate Active Monitoring or Closed line list based on record values.
- **Transferred Out:** Cases who have been transferred out of your jurisdiction to another jurisdiction participating in Sara Alert™ (i.e., due to a monitoree moving outside your jurisdiction).
  - Users lose access to an individual’s records when they are transferred out of their jurisdiction. If you need to maintain complete record data, we recommend exporting records for these individuals before transferring to a new jurisdiction.
  - Records on this list will be purged 14 days after transfer.
  - If you need to transfer a record to a jurisdiction that is not participating in Sara Alert™, export the record then close it. Select “Transferred to another jurisdiction” as the reason. These records will not appear on the Transferred-Out line list.

## 7.4 All Cases

The **All Cases** line list (located on the far right) shows all cases in the jurisdiction who are currently in the isolation workflow.

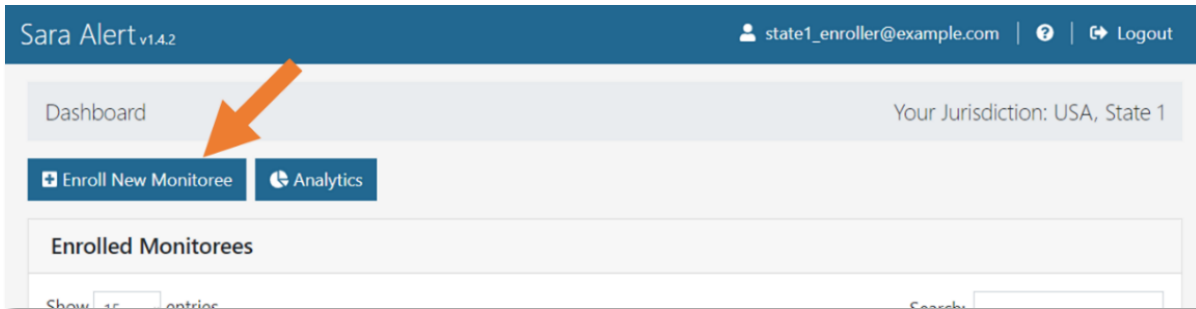
## 8 ENROLLER ROLE CAPABILITIES

### 8.1 Individual Monitoree Record Functions

#### 8.1.1 How to Enroll New Monitoree (Contact or Case)

The Enrollment Wizard is available to **Enroller** or **Public Health Enroller** users.

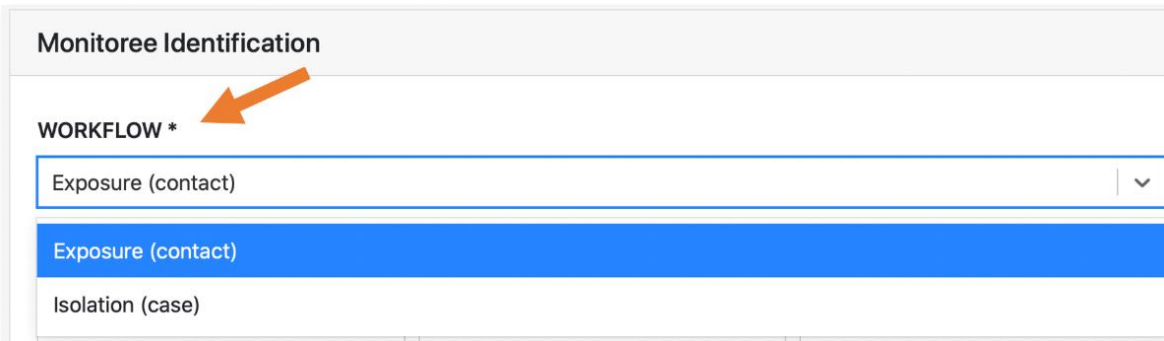
1) Click the “**Enroll New Monitoree**” button.



**Figure 16: Enroll 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 or probable case



**Figure 17: Select Exposure or 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)

## ENROLLER ROLE CAPABILITIES

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.

Monitoree Identification

WORKFLOW \*  
Exposure (contact)

FIRST NAME \* MIDDLE NAME(S) LAST NAME \*

DATE OF BIRTH \* AGE SEX AT BIRTH  
mm/dd/yyyy

GENDER IDENTITY SEXUAL ORIENTATION

RACE (SELECT ALL THAT APPLY) ETHNICITY  
 WHITE  
 BLACK OR AFRICAN AMERICAN  
 AMERICAN INDIAN OR ALASKA NATIVE  
 ASIAN  
 NATIVE HAWAIIAN OR OTHER PACIFIC ISLANDER

LANGUAGE  
Languages that are not fully supported are indicated by a (\*) in the below list.  
PRIMARY LANGUAGE \* SECONDARY LANGUAGE \*

INTERPRETATION REQUIRED

NATIONALITY

STATE/LOCAL ID CDC ID NNDS LOC. REC. ID/CASE ID

Next

**Figure 18. 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.

Additional Planned Travel Edit

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

Potential Exposure Information Edit

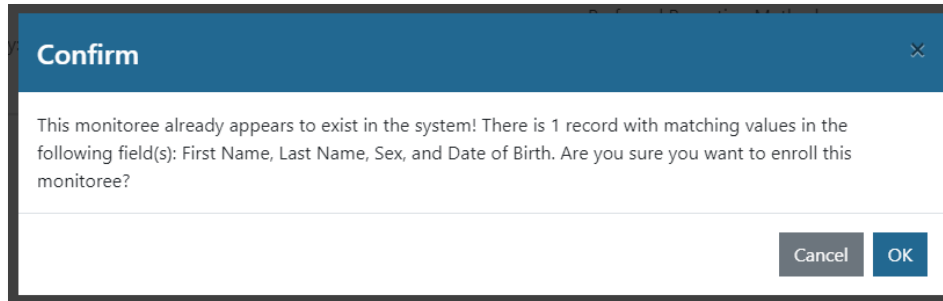
LAST EXPOSURE  
Orlando Hospital  
2020-06-04  
WAS IN HEALTH CARE FACILITY WITH KNOWN CASES

Previous Finish and Add a Household Member Finish Cancel

**Figure 19. Click “Finish” to save the record**

**NOTE:** If the monitoree’s preferred contact information matches that of an existing record among records you have access to, the two records will be linked as a reporting household. See **page 44** 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.



**Figure 20: A confirmation box will appear for potential duplicate records**

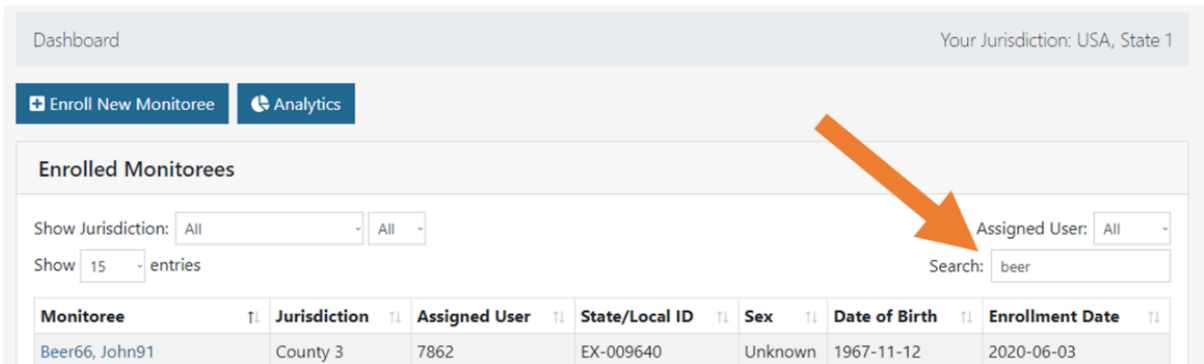
### 8.1.2 How to Edit Monitoree Enrollment Information

Users assigned the **Enroller**, **Public Health**, and **Public Health Enroller** roles can modify monitoree records to add new information or correct data entry errors.

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

**NOTE:** The Public Health and Public Health Enroller roles have access to more advanced filter capabilities. See **page 57** for more details.



**Figure 21: 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.

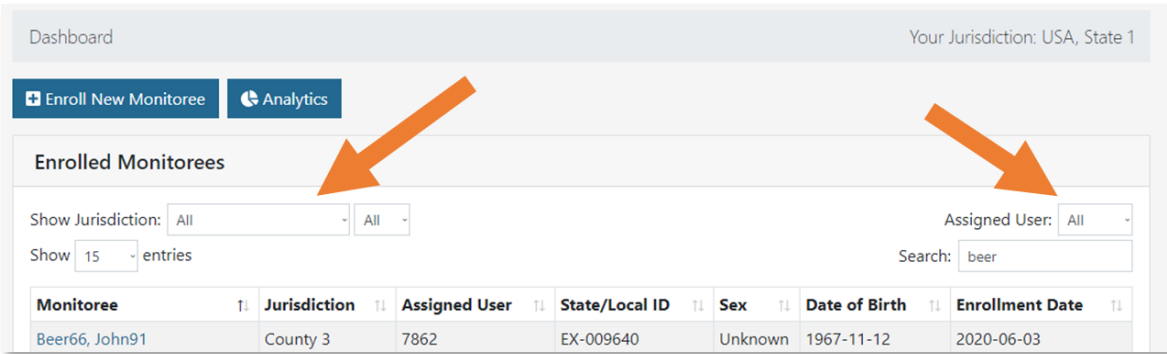


Figure 22: Filter by jurisdiction or assigned user

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



Figure 23: Select monitoree record

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

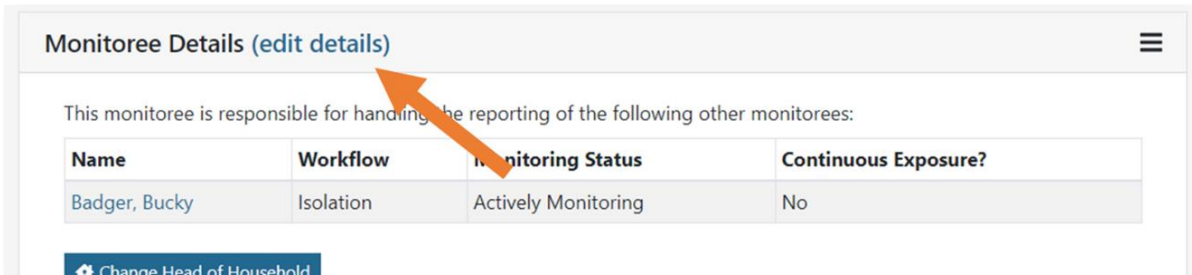


Figure 24: Modify monitoree record

## 8.2 Reporting Household Functions

### 8.2.1 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.

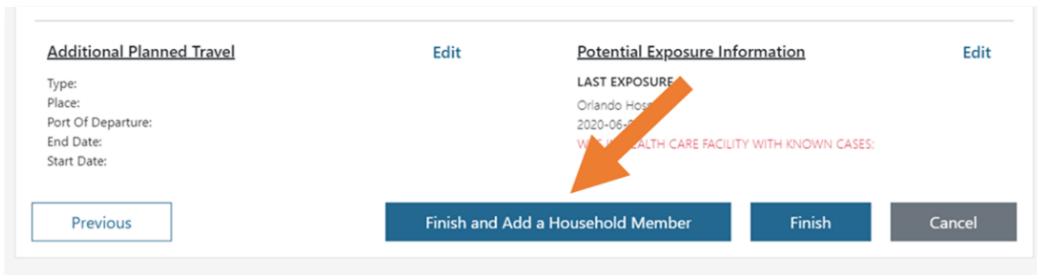
**Tip:** See the [Quick Start Guide for Household Reporting](#)

**NOTE:** If the Head of Household record is closed for any reason, the Head of Household will continue to receive daily symptom reports for all remaining 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 41](#)).

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

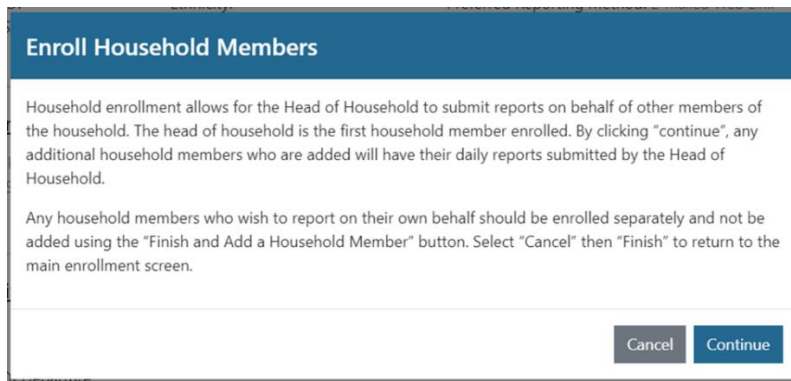
**Enrollers and Public Health Enrollers** can create reporting households using the following steps in the Enrollment Wizard:

- 1) Enroll the Head of Household (by following instructions on [page 38](#)). 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.



**Figure 25: Create household using enrollment wizard**

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



**Figure 26: Note how Sara Alert™ handles household enrollment**

**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.

**NOTE:** Even if contact information is changed for a household member so that it is NOT the same as the Head of Household, the Head of Household will still report on their behalf unless the household member is removed from the reporting household.

**Monitoree Review**

Assigned Jurisdiction: USA, State 1

**Identification:** Minnie Mouse [Edit](#)

DOB: 2001-01-01      Sex:      **Contact Information** [Edit](#)  
 Age: 19      Race:      Phone: 1231241234  
 Language:      Ethnicity:      Preferred Contact Time:  
 State/Local ID:      Nationality:      Type:  
 CDC ID:      Email:  
 NNDS ID:      Preferred Reporting Method: Telephone call

---

**Address** [Edit](#)      **Arrival Information** [Edit](#)

1510 Disney Road      DEPARTED      ARRIVAL  
 Magic Kingdom Florida 44444

---

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

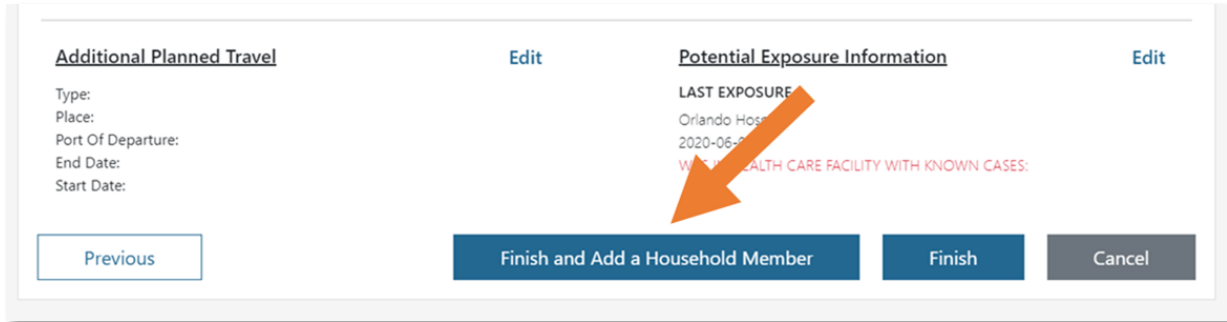
Type:      **LAST EXPOSURE**  
 Place:      Orlando Hospital  
 Port Of Departure:      2020-06-04  
 End Date:      **WAS IN HEALTH CARE FACILITY WITH KNOWN CASES:**  
 Start Date:

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

**Figure 27: Sara Alert™ Automatically Pre-Populates Information for Household Members**

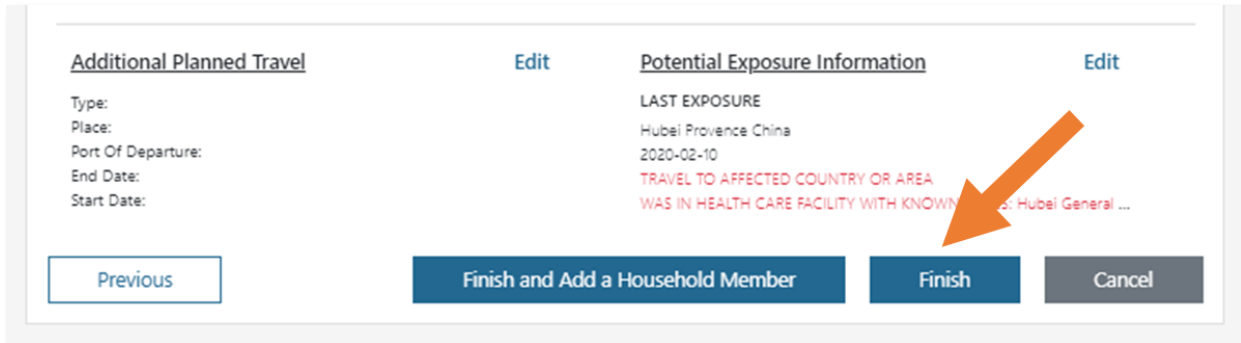


5) Select **“Finish and Add Household Member”** at the bottom of the enrollment review screen to continue to enroll additional household members. The HoH will be responsible for reporting on behalf of each household member.



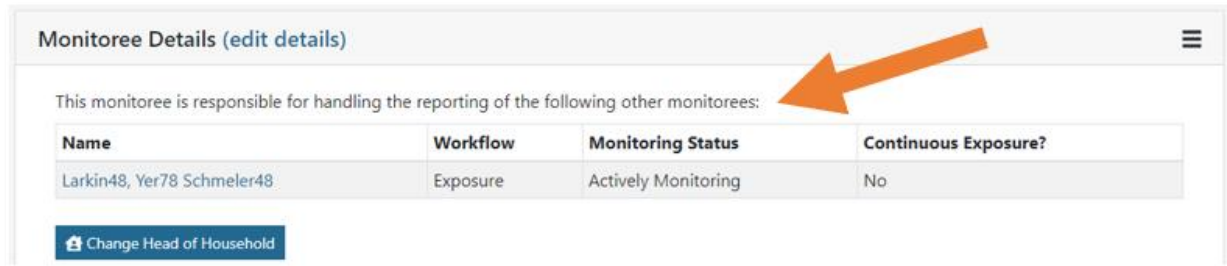
**Figure 28: Monitoree record review**

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.



**Figure 29: Click “Finish” once all household members have been enrolled**

7) The records for household members will be linked in the user interface so public health 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 Head of Household along with their workflow, monitoring status, and continuous exposure status.

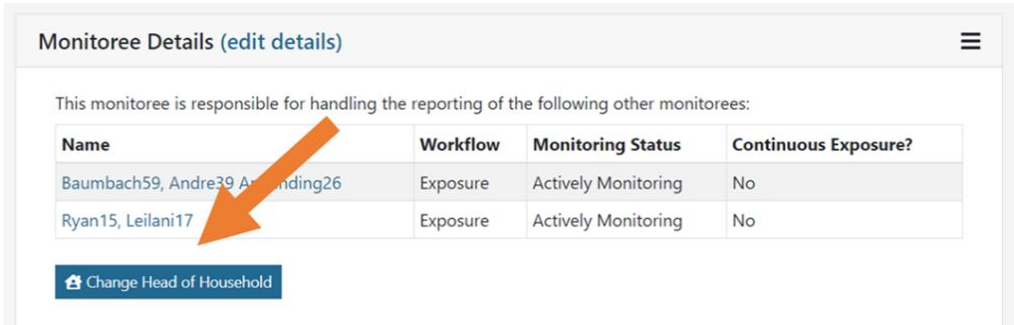


**Figure 30: The Head of Household's record**

## 8.2.2 How to Change a Head of Household (Household Reporter)

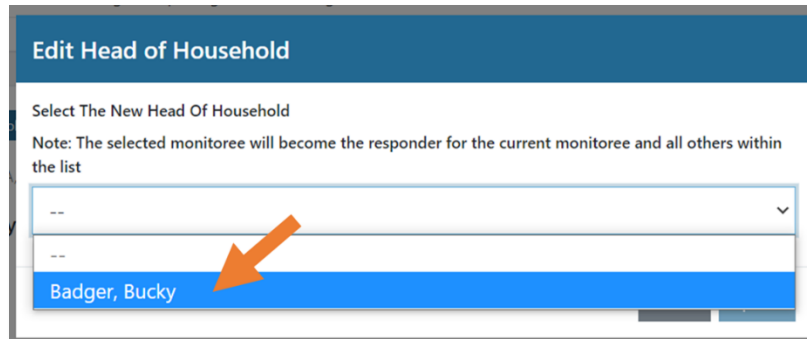
A user with the Enroller, Public Health Enroller, or Public Health role can change which member of a household is designated “Head of Household” (and therefore is responsible for reporting symptoms on behalf of the group) among records to which the user has access.

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



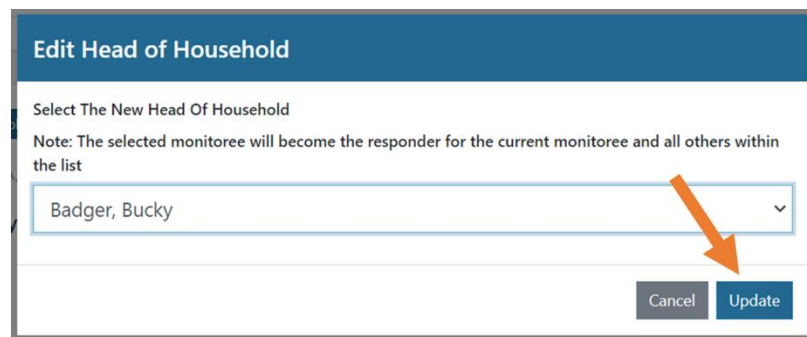
**Figure 31: Click “Change Head of Household”**

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 Head of Household and will be responsible for reporting on behalf of all household members.



**Figure 32: Select the preferred Head of Household**

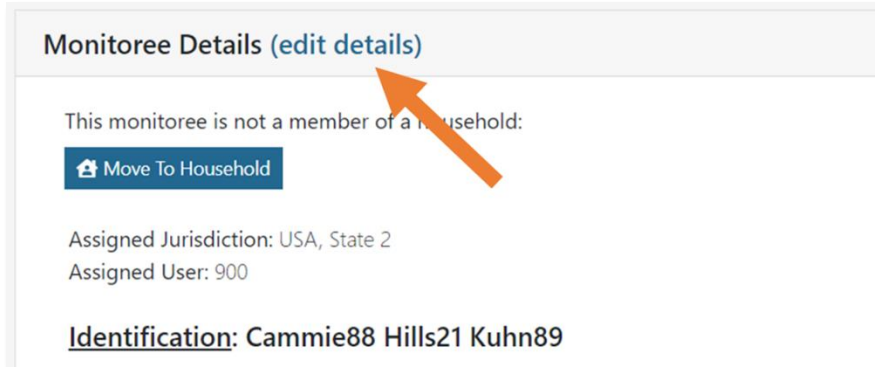
3) Click “**Update**” to save the new Head of Household.



**Figure 33: Click Update to save the Head of Household**

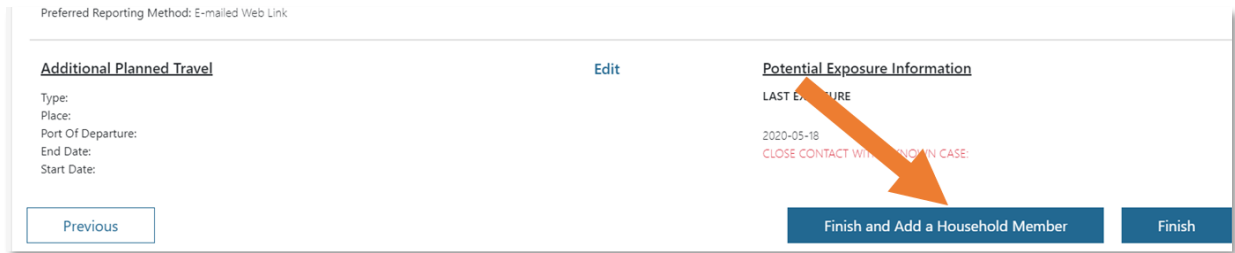
### 8.2.3 How to Enroll a New Household Member into an Existing Household

1) Open the appropriate Head of Household’s record. Select “**edit details**”.



**Figure 34: Edit Head of Household’s record to add new household member**

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



**Figure 35: 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.



**Figure 36: New household member has been linked to HoH**

## 8.2.4 How to Move an Existing Record into a Reporting Household

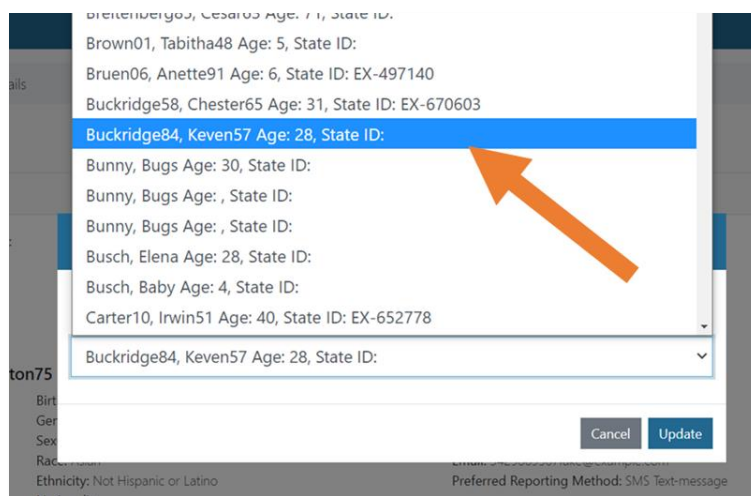
The “move to household” function allows users to create households from existing records in the system that the user has access. A user can either add a record to an existing household or create a new household from two records.

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



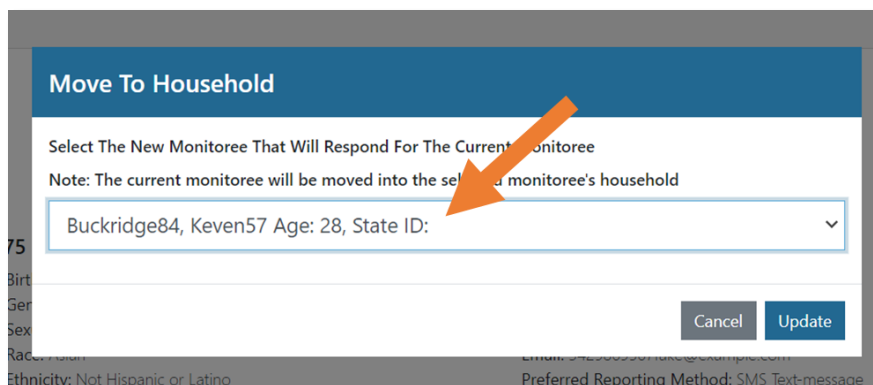
**Figure 37: Click "Move to Household"**

- 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 in the system.



**Figure 38: Select a monitoree’s new household**

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



**Figure 39: Select "update" to move the monitoree into the selected household**

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

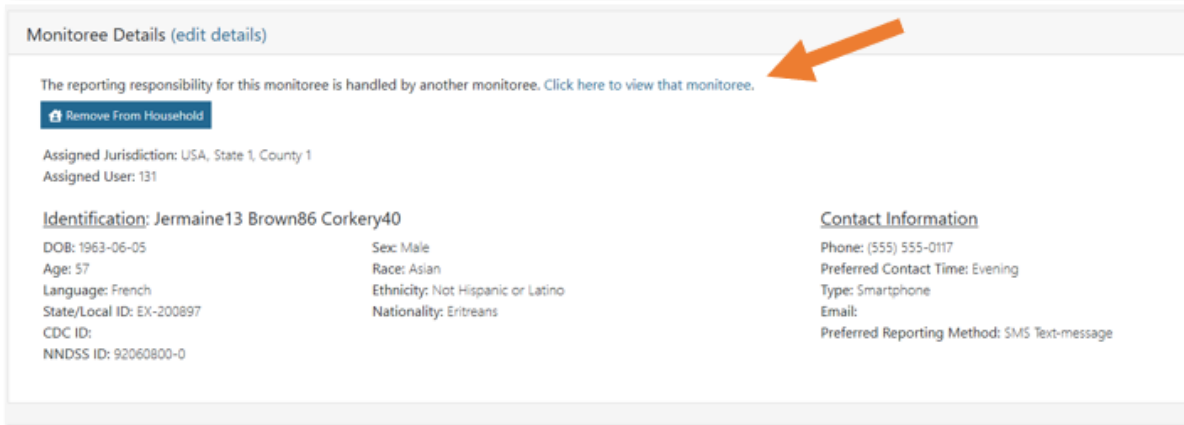


Figure 40: The selected HoH is now responsible for reporting on behalf of the monitree

### 8.2.5 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.

---

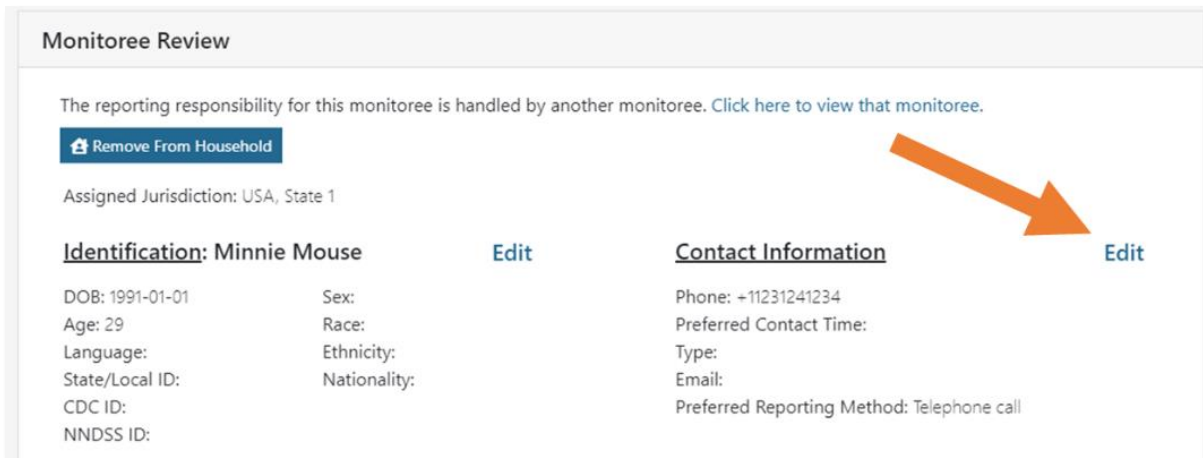


Figure 41: Edit contact information for record to be removed from household

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.

Figure 42: 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.

Figure 43: Select “Remove Household” to complete action

### 8.3 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.

Figure 44: View enrollment analytics

## 9 PUBLIC HEALTH ROLE CAPABILITIES

The following information is for users assigned either the **Public Health** or **Public Health Enroller** role. Sara Alert™ shows exposed monitorees and cases on two different dashboard views: **exposure monitoring** and **isolation monitoring**.

**Tip:** See the [Quick Start Guide for Public Health Users: Exposure Workflow](#)

### 9.1 Dashboard Functions (Both Workflows)

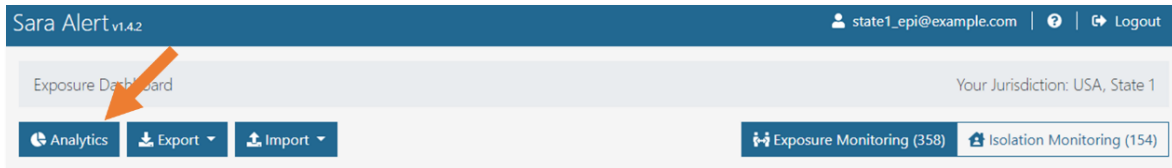
The following sections describe information and features that a **Public Health** or **Public Health Enroller** user can access from the dashboard in either workflow (exposure or isolation). While this section shows images of the Exposure Workflow Dashboard, the same instructions apply to the Isolation Workflow Dashboard.

**Tip:** The public health enroller role also has many of the capabilities of an enroller; see [pages 34 – page 44](#) for more info on those capabilities.

#### 9.1.1 View Analytics Summary

The analytics summary shows aggregated data from both the exposure and isolation workflows. Public Health users can view aggregated monitoring and epidemiological data for their assigned jurisdiction (e.g., local, state, nationwide) and can view summary maps showing Sara Alert™ usage. The data that drives the analytics page is currently updated once a day for performance reasons.

Click “**View Analytics**” button on the dashboard to access this summary. For a detailed description of the analytics summary, please see [page 96](#).



**Figure 45:** Public health users can view an analytics dashboard of their assigned jurisdiction’s data

#### 9.1.2 Export Multiple Records

Sara Alert™ allows users to export monitoree record data, which can be opened in Microsoft Excel, statistical software, or visualization software as needed to meet local analytical needs. This also allows users to save records prior to them being purged from the system to comply with jurisdiction record retention policies.

**NOTE:** It is the responsibility of each user to follow their organization’s protocols to ensure that information is protected once it is exported from Sara Alert™.

**Tip:** All dates and times exported will be in UTC. To convert UTC to your local time zone in Excel:

1. Remove UTC from the date, using the LEFT and LEN formulas
2. Convert the date text to a date value using the DATEVALUE and TIMEVALUE formulas and subtract the appropriate number of hours to adjust to your time zone (minus 4 hours to get to EDT for example).

An online converter can be used to provide the hourly difference between UTC and your local time zone.

### 9.1.2.1 Export File Descriptions

A description of the different export formats currently available are summarized in the section below. A user may export each file type a maximum of once per hour.

**Table 2. Summary of Sara Alert™ Export Files**

Export Format	Records Included	Variables Included	File Type
Line List CSV	Records in the Current Workflow (either Exposure or Isolation)*	Data elements visible across all line lists in the current workflow	CSV
Sara Alert™ Format	Records in Current Workflow (either Exposure or Isolation)*	All Monitoree Details data elements	XLSX
Purge-Eligible Monitorees	Records Across Both Workflows that are eligible for purge during the next scheduled purge	All Monitoree Details data elements, Daily Symptom Reports, Lab Histories, Record Edit Histories	XLSX
All Monitorees	Records Across Both Workflows	All Monitoree Details, Daily Symptom Reports, Lab Histories, Record Edit Histories	XLSX

\*Export formats that are workflow specific export only records from the user's current workflow; the current workflow is determined based on which dashboard (either Exposure or Isolation) the user is currently viewing at the time of export.

### 9.1.2.2 Line List CSV Export

**Purpose:** Provide a lightweight export restricted to variables shown on the line list view

**Contents:** Includes the line list view of records across all line lists from records in either the isolation or exposure workflows (whichever dashboard the user is currently viewing). The file will contain the following data elements:

- Patient ID
- Monitoree Name
- Jurisdiction
- State/Local ID
- Sex
- Date of Birth
- End of Monitoring
- Assigned Use
- Latest Report Time
- Monitoring Plan
- Transferred at Time
- Latest Symptom Report Date
- Reason for Closure
- Transferred at Date
- Transferred From
- Latest Public Health Action
- Reason for Closure
- Case Status
- Closed At (time)
- Status (e.g., line list)
- Closed Date
- Transferred To

### 9.1.2.3 Sara Alert Format

**Purpose:** Provide an export restricted to variables populated during enrollment or import.

**Content:** Includes all enrollment data elements from records in either the isolation or exposure workflows (whichever dashboard the user is actively viewing). Enrollment data elements include the following information: demographics, contact information, travel history, planned travel, potential exposure information, and case information (including any lab results). This is the only export format that can also be used for import.



### 9.1.2.4 Excel Export for Purge-Eligible Monitorees

**Purpose:** Allow users to maintain records according to jurisdiction record retention policies prior to system purge of identifying information

**Content:** Includes all information from purge eligible records across **both** workflows. The file includes the following 4 tabs of information that is linked by the patientID field:

- Monitorees List tab: enrollment data elements (demographics, contact information, travel history, planned travel, potential exposure information, and case information)
- Assessments tab: symptom report assessment history
- Lab Results tab: lab results
- Record Histories tab: all events in the history section of each record

**Definition of Purge Eligible Records:** Closed records that have not been updated for 14 days and have been flagged for purge as explained on **page 14**.

### 9.1.2.5 Excel Export for All Monitorees

This export files include all information from all records displayed on line lists across **both** workflows. The export includes the following files that are linked by the patientID field:

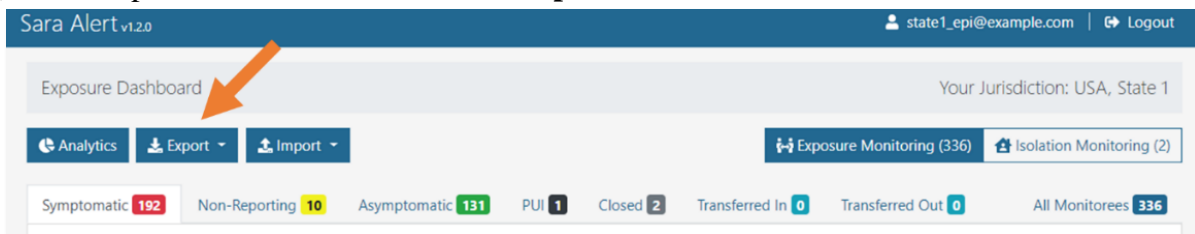
- Monitorees: monitorees details data elements (demographics, contact information, travel history, planned travel, and potential exposure information)
- Assessments: symptom report assessment history
- Lab Results: lab results
- Record History: all events in the history section of each record

## 9.1.3 How to Export Multiple Records

The records associated with each export file type available are described in the section above.

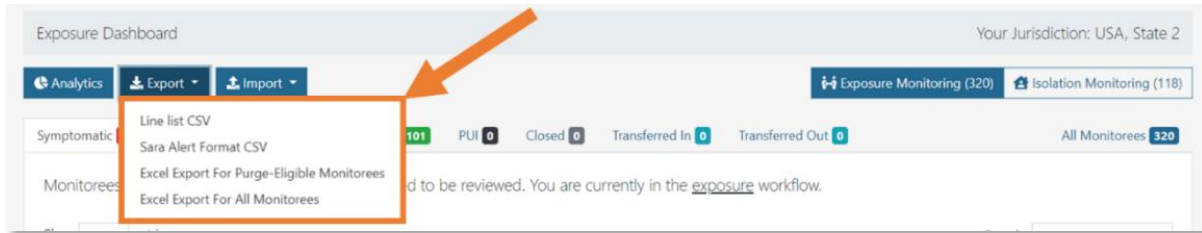
**NOTE:** A user may export each file type a maximum of once per hour. If a user attempts to export a file more than once an hour, the following message will display at the top of the screen: “You have already initiated an export of this type in the last hour. Please try again later.”

1) At the top of the dashboard, click the “**Export**” button.



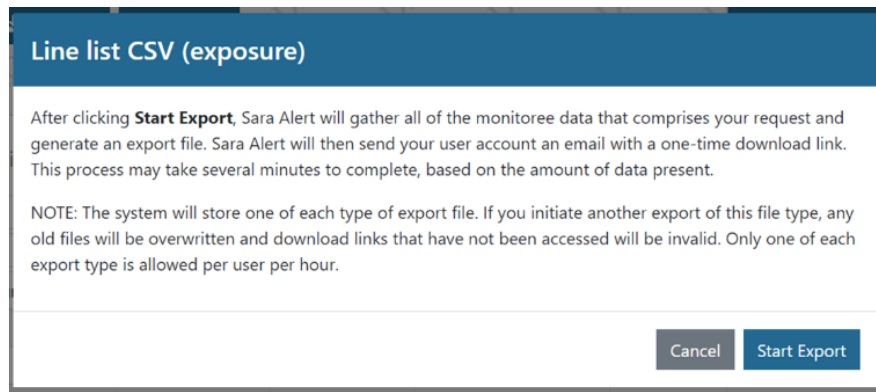
**Figure 46: Export current dashboard view to CSV**

2) From the drop-down menu, select the export type that you are interested in.



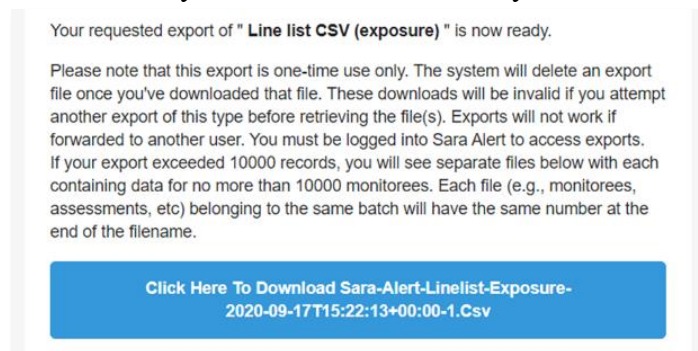
**Figure 47: Sara Alert™ offers several export types**

3) After the export type is selected, click “Start Export”. The system will generate an export file and will send a one-time download link to the email associated with your Sara Alert™ account.



**Figure 48: Export pop-up info window**

4) After receiving the email, select “Click here to download”. The URL of the download will always begin with <https://sara.public.saraalert.org/export/download> followed by a unique set of alphanumeric characters. Always check the URL to verify the download link’s legitimacy.

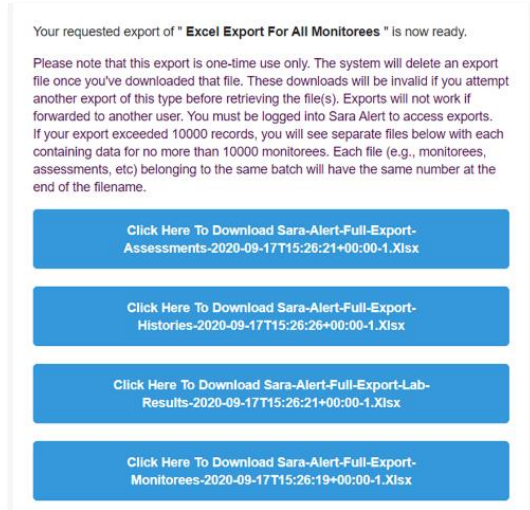


**Figure 49: Email notification with one-time link to download export file**

5) For the “Excel Export for All Monitorees” format, you will instead receive an email with multiple links, one for each of the following data sets:

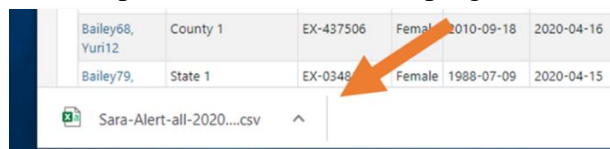
- **Monitorees** – Monitoree Details data elements
- **Assessments** – All symptom reports for all monitorees in the jurisdiction
- **Lab Results** – Lab results for all monitorees in the jurisdiction
- **Record Histories** – All events in the history section of each record

In larger jurisdictions, Sara Alert™ will further split the export files for every 10,000 monitorees. Users will receive a separate export link for each data set, for every 10,000 monitorees. After downloading the files independently, you can merge them into one file for analysis.



**Figure 50: Email notification with links to download for “Excel Export for All Monitorees” format**

6) Click the downloaded file to open in Excel or another program.



**Figure 51: Downloaded CSV file**

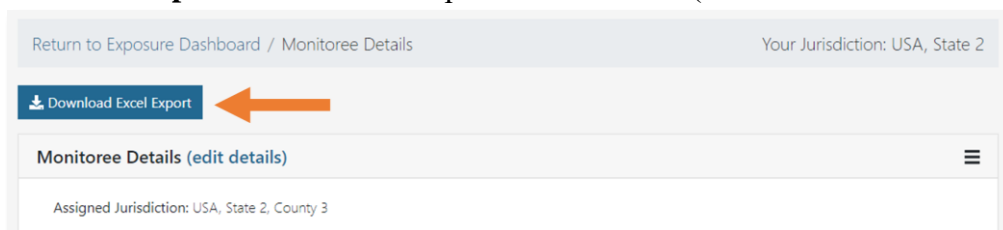
### 9.1.4 How to Export a Single Monitoree Record

The export for a single record includes the following 4 tabs of information that is linked by the patientID field:

- Monitorees – Monitoree Details data elements
- Assessments – All symptom reports for all monitorees in the jurisdiction
- Lab Results – Lab results for all monitorees in the jurisdiction
- Record Histories – All events in the history section of each record

**NOTE:** There is no limit to the number of times a single record can be exported during an hour timeframe.

1) To download an individual patient’s record, open the record of interest and click the “**Download Excel Export**” button at the top left of the screen (above “Monitoree Details”).



**Figure 52: Download an individual monitoree’s record**

2) For the individual record export, the file will download directly into your browser. You will not receive an emailed link as with other export types.

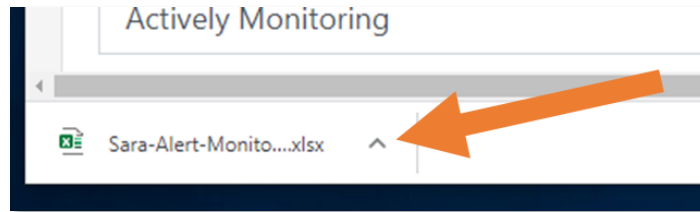


Figure 53: Individual monitree records will download directly through the browser

## 9.1.5 Import Records

Users can import two different types of files into Sara Alert™ to bulk enroll exposed monitrees or cases. Data from other systems can be mapped to the available templates to reduce data entry burden of enrolling monitrees.

### 9.1.5.1 Epi-X Import Format Description

Sara Alert™ can import data from the spreadsheets distributed to jurisdictions via Epi-X notifications. The Epi-X notification spreadsheet import populates a limited subset of Sara Alert™ enrollment data elements noted in the “Importing” Section of the FAQs (available at <https://saraalert.org/frequently-asked-questions/>). After import, the record can be updated by a public health user.

### 9.1.5.2 Sara Alert™ Import Format Description

The Sara Alert™ import template populates all enrollment data elements in either workflow. The most current import template and formatting guidance is available in the user interface under the “Import” button. The “**Template**” tab must be the first tab listed for the import to be successful. The system will ignore the “Example” and “Formatting Guidance” tabs.

**NOTE:** The most current import template must be used to import and ensure all data elements are populated successfully. A user may only import records into assigned jurisdictions that the user has permission to do so. For more information on when monitrees will receive a message from the system after import, see **page 110**.

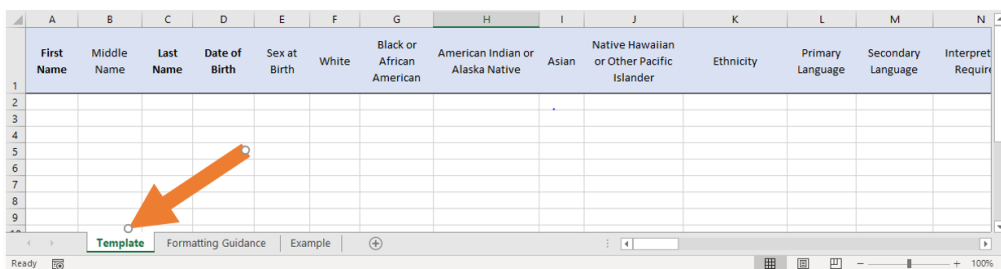


Figure 54: The “Template” tab must be listed first for the import to be successful. The system will ignore the “Example” and “Formatting Guidance” tabs

### 9.1.5.2.1 Requirements for Symptom Onset Date and Last Date of Exposure

The Sara Alert™ import template is designed to allow a user to use the same template for importing records into either the exposure or isolation workflow. The workflow that a user chooses to import records into (e.g., exposure, isolation) impacts which fields are required or supported on import. The **fields that differ by workflow** are listed below:

- **Exposure Workflow**
  - **Required:** Last Date of Exposure - used to define monitoring period)
  - **Not Required:** Symptom Onset Date -this field will be ignored on import and the symptom onset date field will be blank after the record is created. See page 27 for more information.
- **Isolation Workflow**
  - **Required:** Symptom Onset Date - used to determine if the non-test-based recovery (e.g., symptom based) definition has been met
  - **Not Required:** Last Date of Exposure – this field will be populated if any data is provided

Fields not listed above are fully supported when importing records into either workflow.

### 9.1.5.2.2 Format for Dates and Phone Numbers

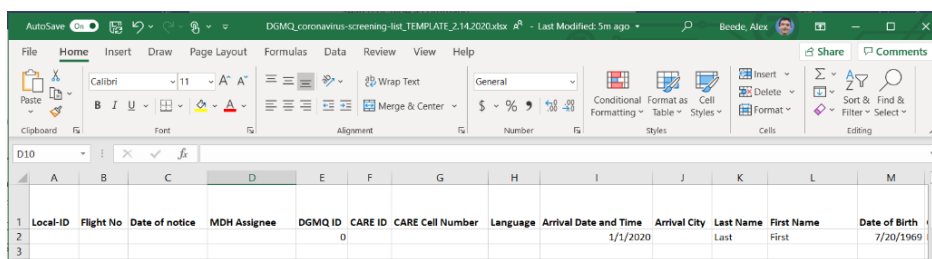
Sara Alert™ accepts a different slightly format for dates and phone numbers when someone is enrolled via import versus the Enrollment wizard. The purpose of this is to optimize usability of the user interface while minimizing import errors that may occur (e.g., month and day reversal) whenever the date format differs between systems. Note the differences in format below. Using the enrollment wizard format during import may cause import errors.

**Table 3: Data formats for Dates and Phone Numbers**

Data Type	Import Format	Enrollment Wizard Format
Date	YYYY/MM/DD	MM/DD/YYYY
Phone Number	+1#####	#####

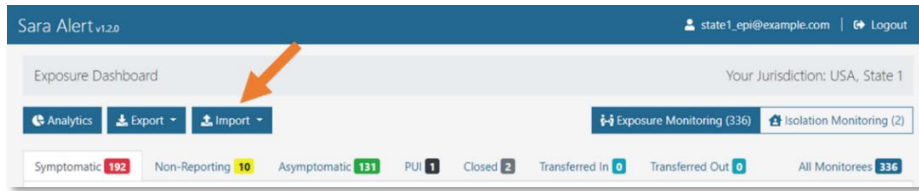
### 9.1.5.3 How to Import Multiple Records

1) Prepare a file for import according to the appropriate template guidelines; if you have any questions about the requirements, email [sarasupport@aimsplatform.com](mailto:sarasupport@aimsplatform.com).



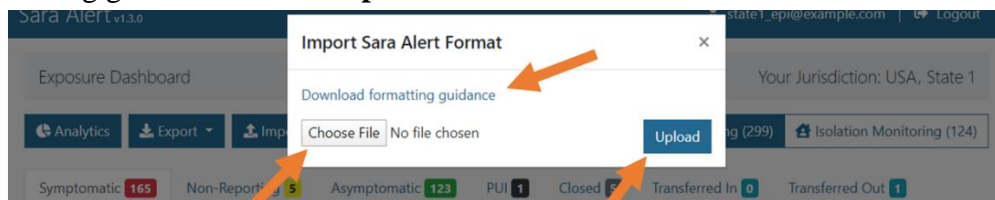
**Figure 55: Sara Alert™ provides two templates for data import; the Epi-X template is shown here. Import errors will result if the template formatting guidelines are not followed.**

2) Select the monitoring workflow that you wish to import the records into (e.g., contacts into **Exposure Monitoring** or cases into **Isolation Monitoring**). Click the **“Import”** button on the top of the dashboard. Select either **“Epi-X”** or **“Sara Alert™ Format”** depending on the file type you are importing.



**Figure 56: Click the Import Button and choose your file type**

3) Click **“Choose File”** to select a file to upload. The **“Sara Alert™ Format”** option provides the latest formatting guidance. Select **“Upload”**.

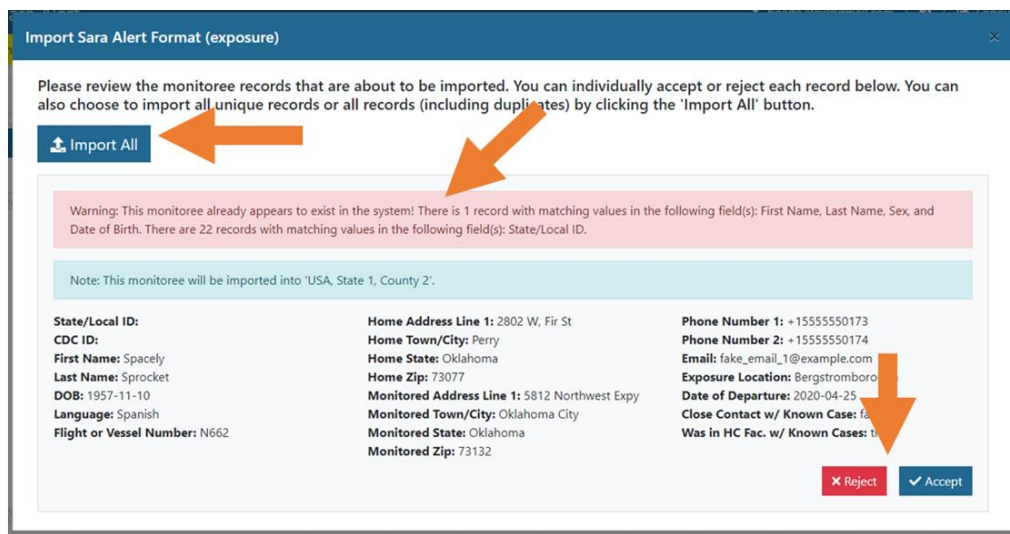


**Figure 57: Select a File to Upload; Epi-X import shown**

4) Review the records before importing them. The system compares the import file against existing records in the system within the importing user’s jurisdiction to identify 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. The system will inform the user which match criteria was met to identify the potential duplicate. The system does not check for duplicates within the import file.

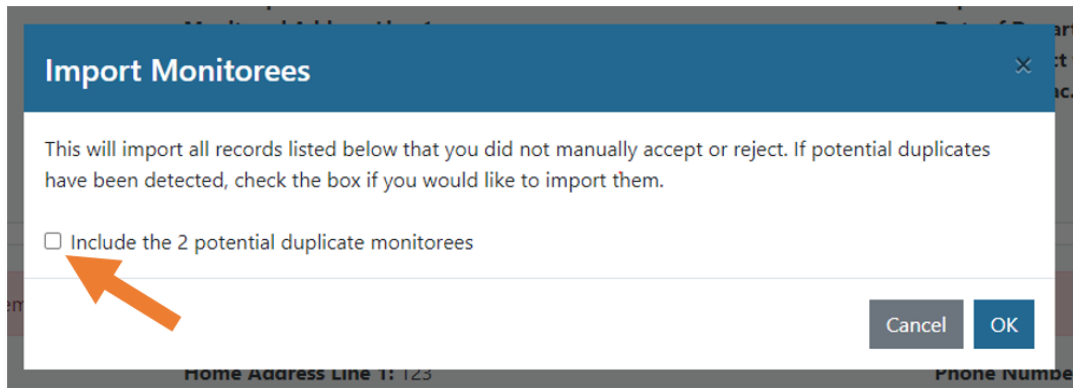
The user can choose to:

- Review individual records and select **“Accept”** or **“Reject”** for each record
- Select **“Import All”** to accept all remaining records.



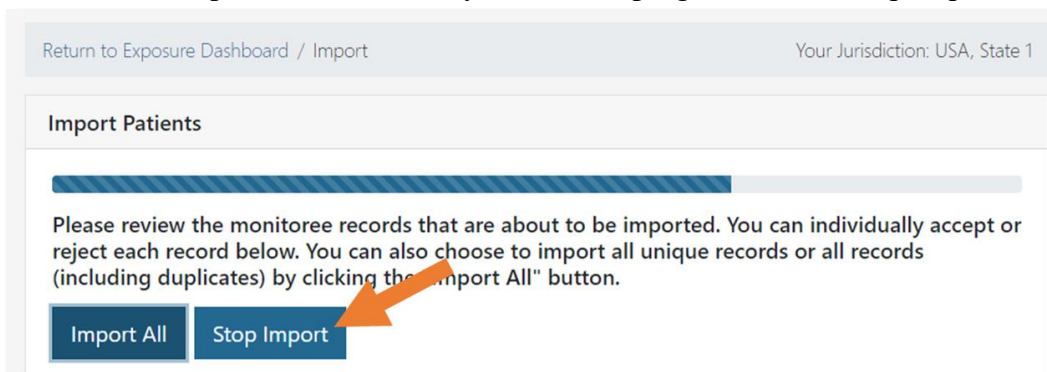
**Figure 58: Sara Alert™ import screen (Note how duplicate records are marked)**

5) If you choose to select “**Import All**” to accept remaining records that were not individually accepted or rejected, by default, only unique records will be accepted unless the user chooses to include detected duplicate monitorees. To include potential duplicates, check the box and click “OK”. If no potential duplicates are found, a check box will not appear.



**Figure 59: Selecting “Accept All” gives the option to include remaining duplicates**

6) Large files may take several minutes to import. A bar at the top indicates progress of record creation from the import file. The “**Stop Import**” button halts additional record creation. However, this function does not delete records that have already been added during import session. For smaller import files, a user may not see the progress bar or “Stop Import” button.



**Figure 60: Click “Stop Import” to end the import**

**NOTE:** The upper limit allowed for each import file is 1000 records. If a user would like to import more than 1000 records, it is recommended that multiple import sessions are completed. Users may also consider use of the API for large imports.

#### 9.1.5.3.1 Importing Multiple Monitreees as a Single Reporting Household

Sara Alert™ will automatically group monitreees as a household on import based on their preferred reporting method.

- For monitreees that choose to be notified by text or phone call, the system will link individuals into households based on an exact match of the primary phone number.
- For monitreees that choose to be notified by email, the system will link individuals into households based on an exact match of email.
- The system will automatically assign the Head of Household role to the first monitreee uploaded in the file with the same phone number or email address.

If a user uploads one or more monitorees whose preferred contact details are an exact match for an **existing** monitoree in the system, Sara Alert™ will automatically link all of these monitorees into a household, with the existing monitoree assigned the Head of Household role. See **pages 41-44** for instructions on how to modify households in Sara Alert™.

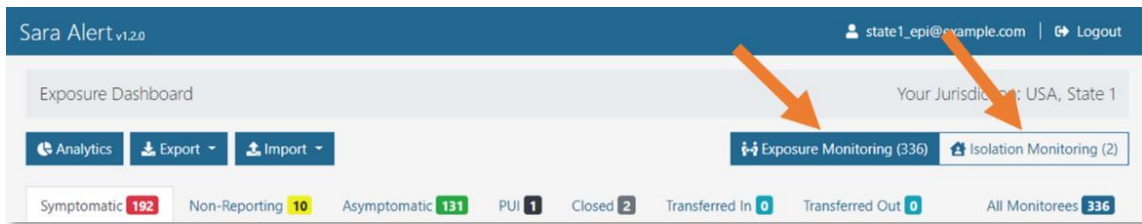
**NOTE:** Automatic linkage of households based on contact method only occurs at the time of record creation (e.g., enrollment or import). The system does not automatically create household linkages if contact information is updated after record creation.

### 9.1.6 How to Toggle Between the Exposure and Isolation Monitoring Dashboards

Public health users have access to both the Exposure and Isolation Monitoring Dashboards.

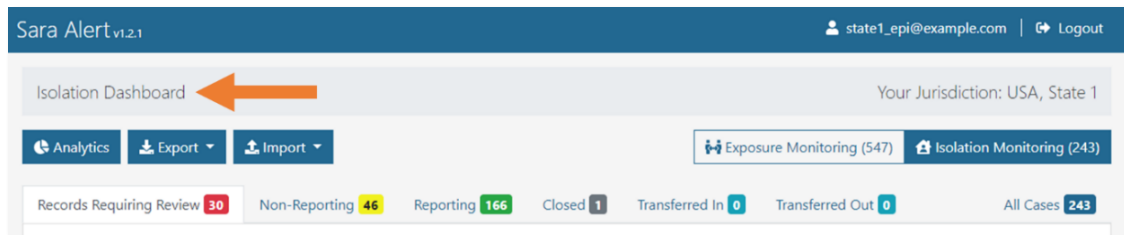
- **Exposure Workflow:** Used to monitor a potentially exposed individual for symptoms during a specified period of time (e.g., 14 days) to determine if the person becomes ill.
- **Isolation Workflow:** Use to monitor a case to determine whenever it is safe to discontinue isolation.

1) Toggle between the workflow dashboards by clicking on “**Exposure Monitoring**” or “**Isolation Monitoring**” on the upper right of the dashboard.



**Figure 61: Toggle between the exposure and isolation monitoring dashboard views**

2) The view will update. The active monitoring dashboard button is shown in dark blue and the dashboard titles are updated.



**Figure 62: The Isolation Dashboard**



## 9.1.7 How to Navigate Monitoring Dashboard Line Lists

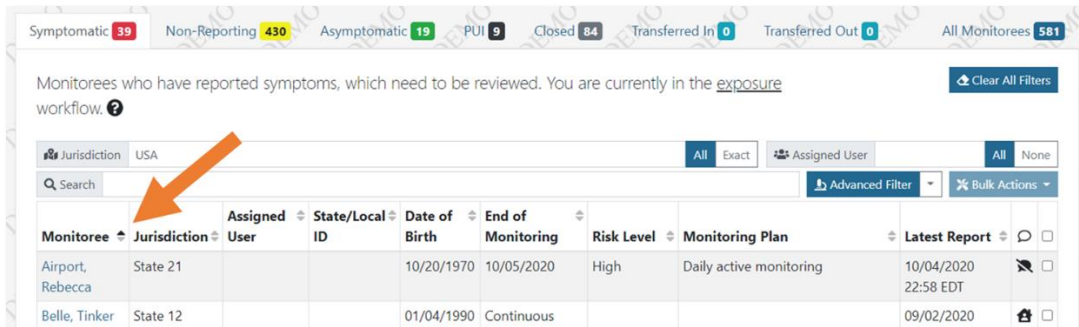
A video tutorial for navigating the line lists in the exposure workflow is available at: [saraalert.org/public-health/tutorial-videos/](https://saraalert.org/public-health/tutorial-videos/). Navigation between the line lists works the same in the exposure and isolation workflows (though the line list names are different).

1) View line lists of monitorees. Select tabs to view monitorees on each line list. To view all records in the exposure workflow, select the “All Monitoree” line list or the “All Cases” line list in the isolation workflow.



**Figure 63: Click through the tabs to view the monitoree line lists**

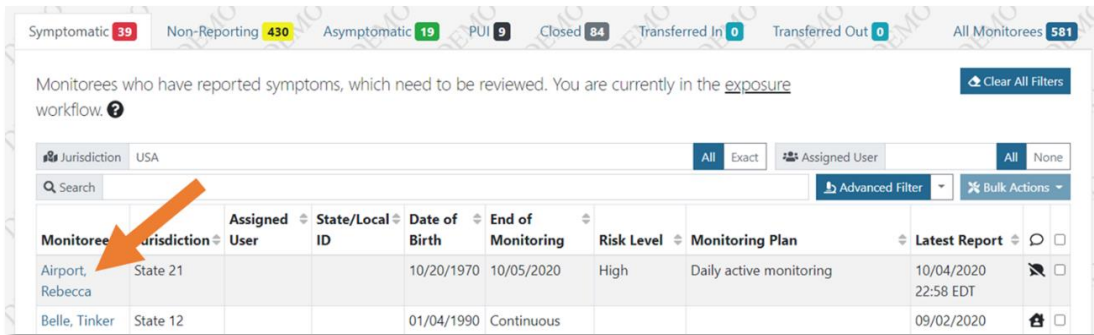
2) Sort columns by clicking on the arrow icons.



**Figure 64: Sort monitoree records by one or more columns**

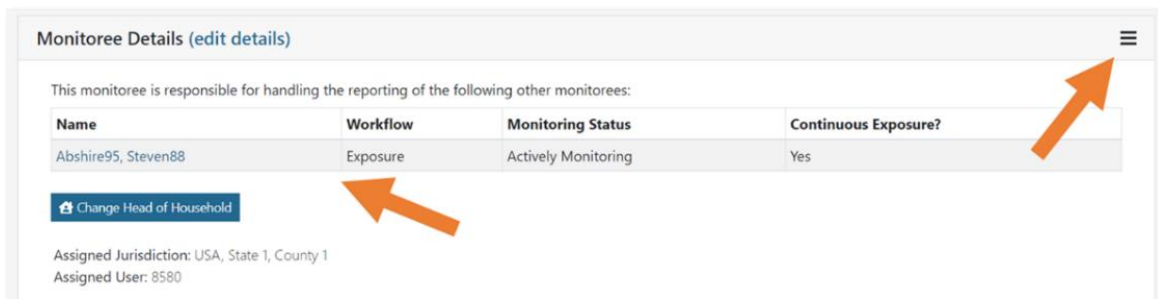
## 9.1.8 How to Open and View a Monitoree's Record

1) Open the monitoree's record by clicking on their name. View the record details.



**Figure 65: Click the monitoree's name to open their record**

2) The “**Monitoree Details**” section defaults to a collapsed view. Click the three horizontal lines in the top right corner of this section to view the full record. If the monitoree is a Head of Household, that information will appear at the top left of the section



**Figure 66: Monitoree Details shows household members and defaults to a collapsed view**

**NOTE:** Navigating to a monitoree's record will clear some search fields (see page 58).

## 9.1.9 How to Search for One or More Monitoree Records

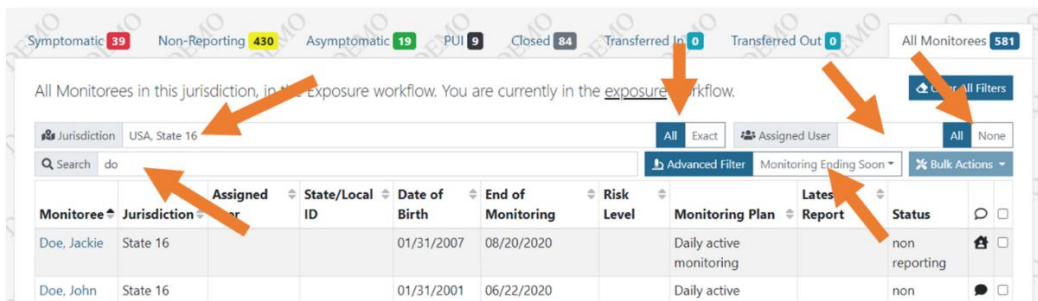
Public Health Users can use three different types of searches to identify one or more monitorees of interest on a Sara Alert™ line list:

1. **Basic Search (page 58)**
2. **Dashboard Quick Filters:** Users can filter records from the dashboard by Jurisdiction or Assigned user (without using Advanced Search) (page 59)
3. **Advanced Filters:** Allows users to search across multiple fields and to construct more complex search queries using the “Advanced Filter” feature (page 60)

Users can use these search features independently or in combination with each other (e.g., by setting up an advanced filter AND filtering by Assigned User on the dashboard). The dashboard will only show monitorees that meet ALL the active search parameters and filters.

When filters are applied, the number of records that meet the current parameters appears at the bottom of the page. The numbers on the line list tabs **will not** dynamically change based on search (see **Figure 81** on page 64).

To see all applied filters, users should check the following: Jurisdiction and Assigned User Quick Filters to see which criteria are applied (selected filter option and specified values), Search Bar for search terms, and name of current Advanced filter applied.



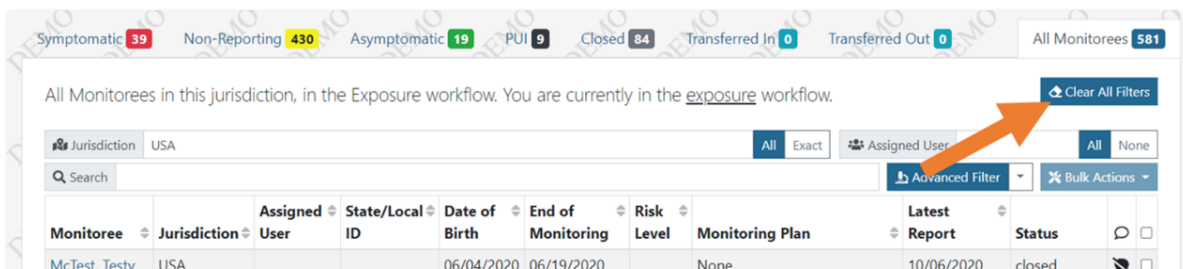
**Figure 67: Check all filters to see what is currently active**

All search field entries are saved when navigating between line lists in the same workflow. When changing workflows, navigating to a record and then back to the dashboard, or enrolling a new monitorree, Sara Alert™ remembers what the user typed into the Basic Search field, as well as any **saved** Advanced Filters. Table 4 shows which search field entries are saved after performing common Sara Alert™ actions.

**Table 4: Guide to whether search field entries are saved after performing Sara Alert actions**

Search Type	Moving between line lists (same workflow)	Changing workflows	Opening a record and returning to dashboard	Enrolling a new monitorree
Basic Search	Saved	Saved	Saved	Saved
Jurisdiction Filter	Saved	Not Saved	Not Saved	Not Saved
Assigned User Filter	Saved	Not Saved	Not Saved	Not Saved
Advanced Filter (saved name)	Saved	Saved	Saved	Saved
“Untitled” Advanced Filter (unsaved)	Saved	Not Saved	Not Saved	Not Saved

You can clear all active filters and searches by clicking the “Clear All Filters” button. This will also reset the number of records shown to 25.



**Figure 68: Click “Clear All Filters” to remove all filters**

### 9.1.9.1 Basic Search

**NOTE:** While this section shows images of the Exposure Dashboard, the same instructions apply to the Isolation 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: YYYY-MM-DD)
- State/Local ID
- NEDSS/Case ID
- CDC ID

Basic search terms are remembered by the system when you change line lists and when you view a record then return to the dashboard. Basic search terms will be applied until cleared by a user.

1) To limit the search for a record within a specific line list, click on the appropriate line list name and enter the search criteria in the search box.

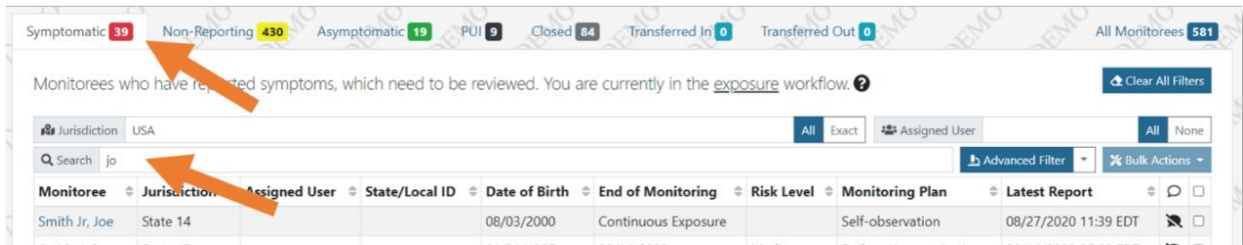


Figure 69: Search for a record within a specific line list by selecting that line list

2) To search across all records in the exposure workflow, click “All Monitorees” and then enter the search criteria in the search box.

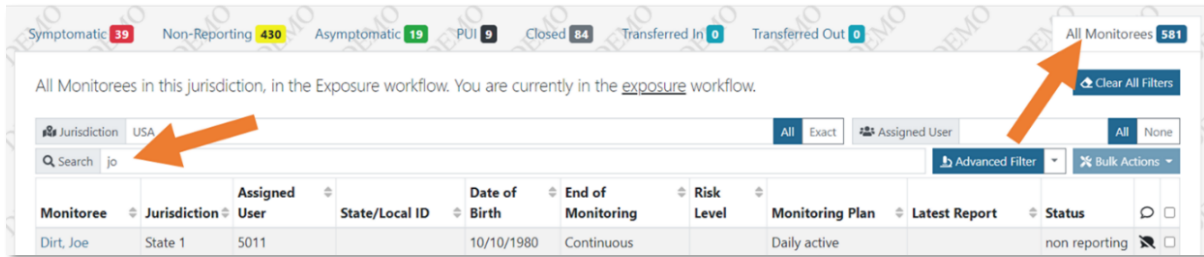


Figure 70: Search among all tabs by selecting the “All Monitorees” tab

### 9.1.9.2 Filter by Assigned User or Jurisdiction (Dashboard Quick Filters)

You can filter monitorees based on jurisdiction and user assignment directly from the dashboard.

**NOTE:** These filters are remembered by the system when you change line lists but are not remembered if you view a monitoree’s record and then return to the dashboard. If you would like to maintain these filters on the dashboard while working through monitoree record updates, you should open a new internet browser tab to view and update monitoree record details.

**Tip:** To open a monitoree record in a new internet browser tab to maintain your dashboard view, right-click on the monitoree name from the dashboard and select “Open link in new tab”.

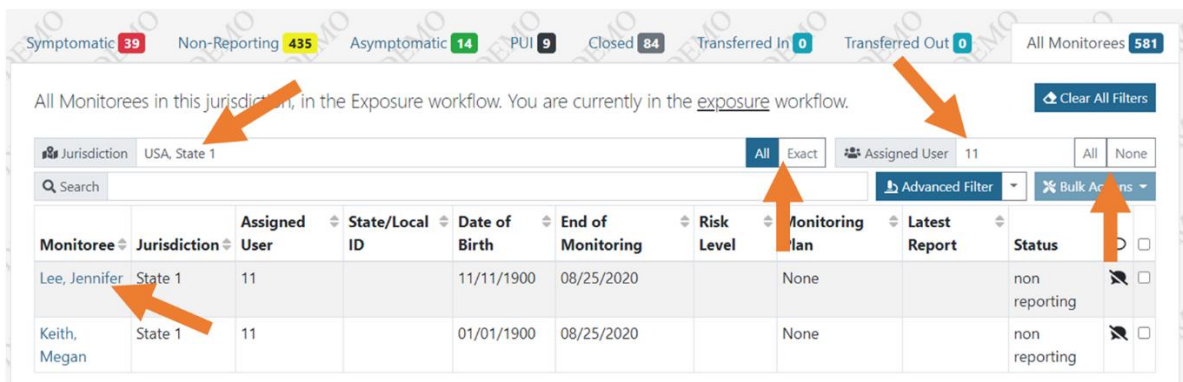
#### To filter by Jurisdiction:

- Enter the Jurisdiction of interest in the **Jurisdiction** field, OR select the jurisdiction from the drop-down menu
  - The drop-down menu will auto-populate with sub-jurisdictions as you type

- Click the “**All**” button to include all sub-jurisdictions within the jurisdiction you entered
- Click the “**Exact**” button to filter for only monitorees in exactly the jurisdiction you select (i.e., does not include sub-jurisdictions)

### To filter by Assigned User:

- Enter your Assigned User number in the **Assigned User** field, OR select the number from the drop-down menu
  - The drop-down menu will auto-populate with assigned user numbers that contain the value you entered
  - Click the “**All**” button to clear the current Assigned User filter
  - Click the “**None**” button to show only monitorees where the Assigned User field is blank



**Figure 71: Search and/or sort by jurisdiction and user assignment**

### 9.1.9.3 Advanced Filter

Sara Alert™ supports an Advanced Filter capability, which allows users to search across multiple fields and to construct more complex search criteria using the “Advanced Filter” feature. A user may set criteria for up to 5 fields (out of 29 available fields) for each advanced filter.

When using the Advanced Filter feature, keep in mind these **helpful hints**:

- All filters are applied to the **current workflow**. You may navigate between line lists within a workflow to view records that meet the specified criteria on each.
  - Navigate to the **All Monitorees** line list (Exposure Workflow) or the **All Cases** line list (Isolation Workflow) to view all monitorees in each workflow that meet specified criteria.
  - **Saved**, applied filters will continue to be applied when toggling between workflows. See **page 64** for directions on how to save filters.
- Advanced Filters are applied in addition to Basic Search terms and Quick Filters (**Assigned User, Jurisdiction**). See **page 58** for more information on the Basic Search
- For example, if a user has filtered by an assigned user and applied an advanced filter, the user will only see records that meet all criteria. See Appendix A (**page 115**) for a full list and description of all advanced filter fields, along with accepted values.

### 9.1.9.3.1 Create a New Filter

To create a new filter:

- 1) Click the “Advanced Filter” button.

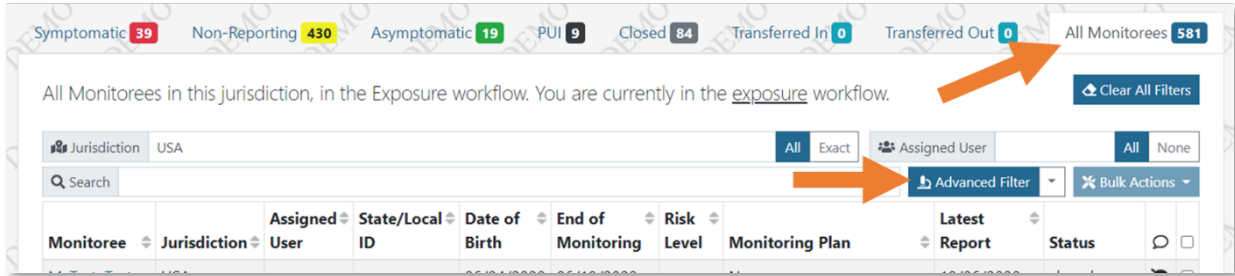


Figure 72: Click the “Advanced Filter” button

- 2) This will open the Advanced Filter window. Your current workflow is indicated at the bottom of the window.

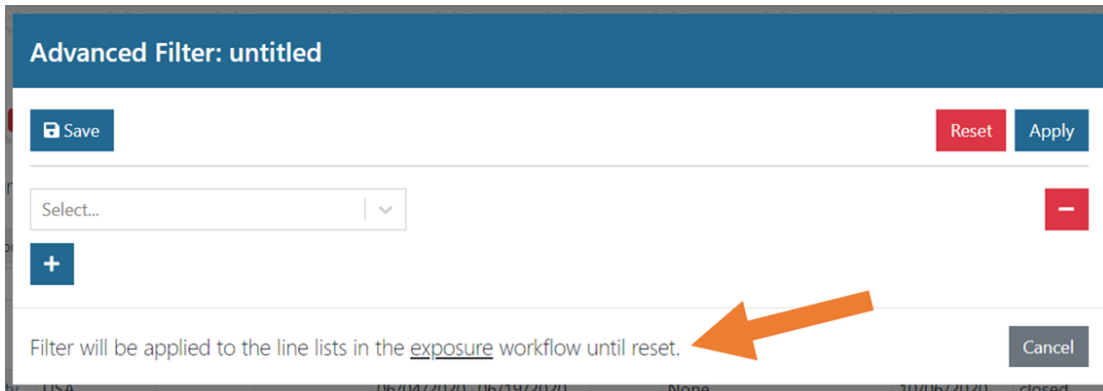


Figure 73: Select the filter field from the drop-down.

- 3) Choose the field(s) you want to filter by from the “Select” drop-down menu. See page 115 for a full list and description of all fields that can be selected.

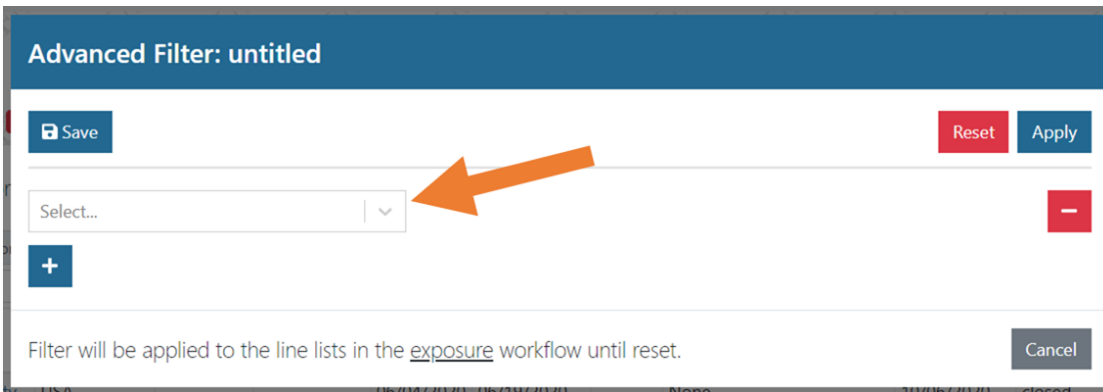


Figure 74: Select the filter field from the drop-down.

4) Adjust the variables to match your desired criteria.

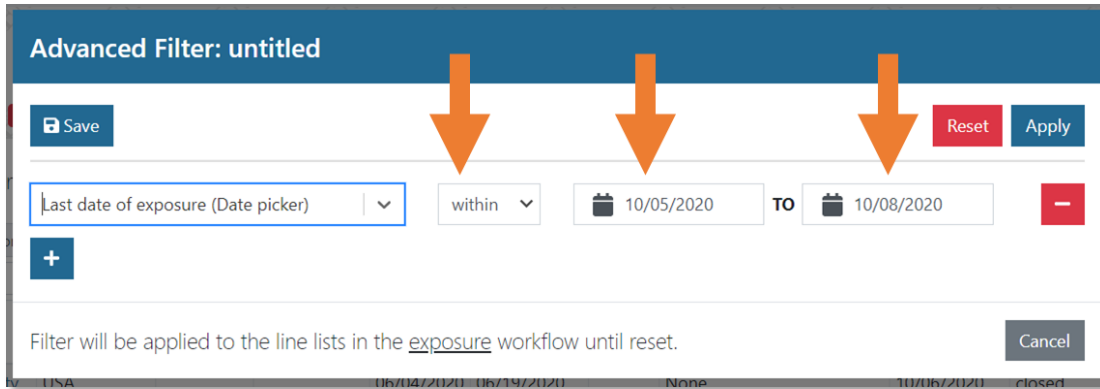


Figure 75: Adjust the parameters as appropriate

5) Add additional filter parameters by clicking the “+” button.

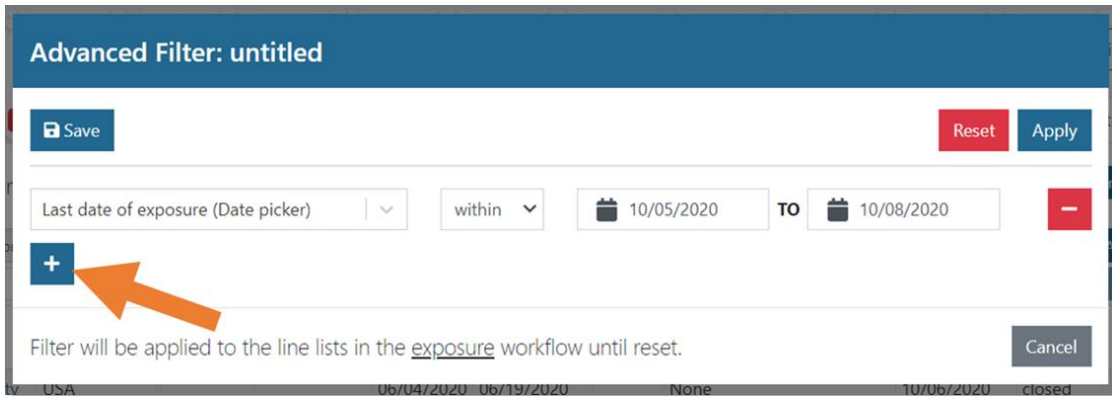


Figure 76: Add additional parameters with the “+” button

6) Only records that meet ALL of the criteria included in the advanced filter (i.e., each parameter is linked by an “AND” statement) will be displayed.

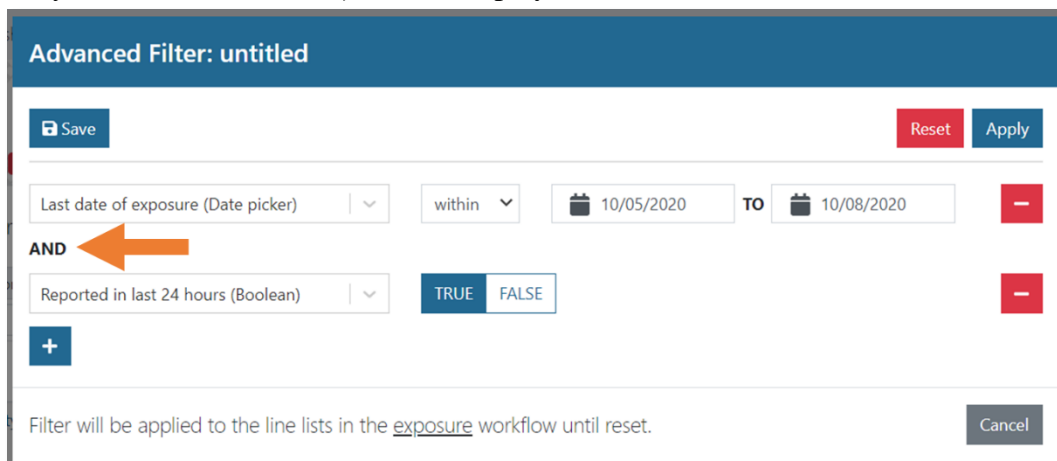
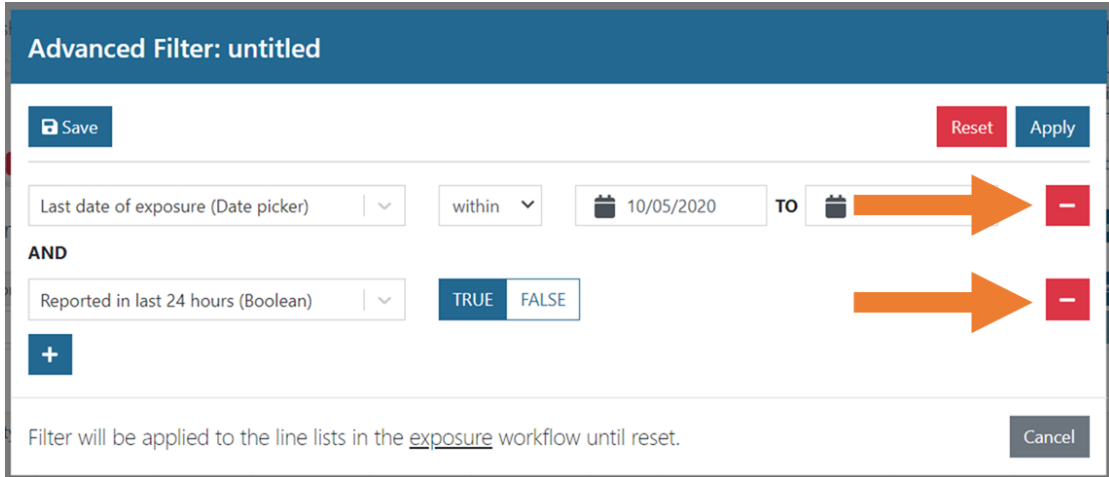


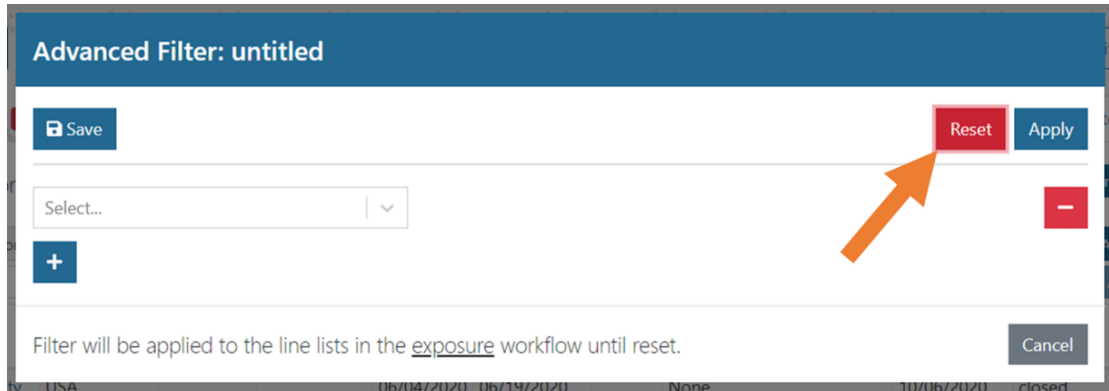
Figure 77: Additional criteria are linked by an “AND” statement

7) Click the “-” button to remove a parameter from the filter.



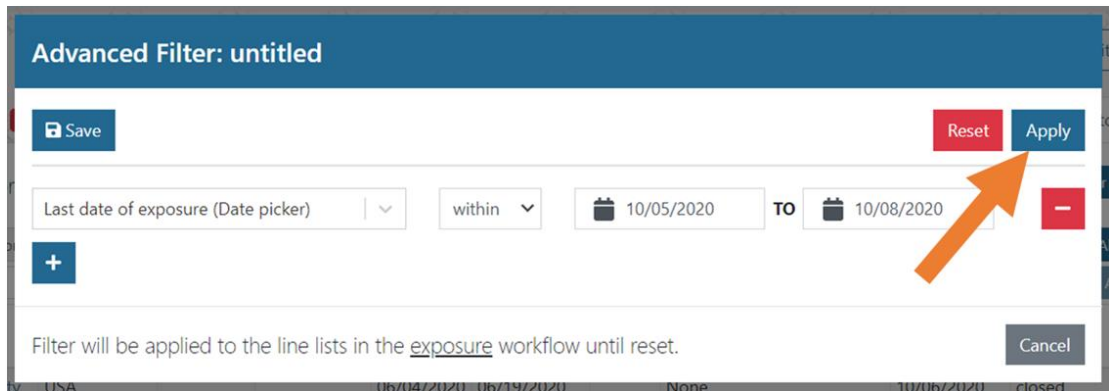
**Figure 78: Remove individual parameters with the “-” button**

8) You can remove all parameters by clicking “Reset.” You will lose any unsaved filter changes.



**Figure 79: Click “Reset” to remove all parameters**

9) Click “Apply” to apply the filter to the dashboard.



**Figure 80: Click “Apply” to apply the filter**



10) Only monitorees that meet the specified parameters will be shown. The number of monitorees in the current line list that meet the parameters is indicated at the bottom of the dashboard view; the numbers on the line list tabs will still show the total (unfiltered) numbers of monitorees on that line list.

Clicking “Clear All Filters” will clear the all filters and search criteria.

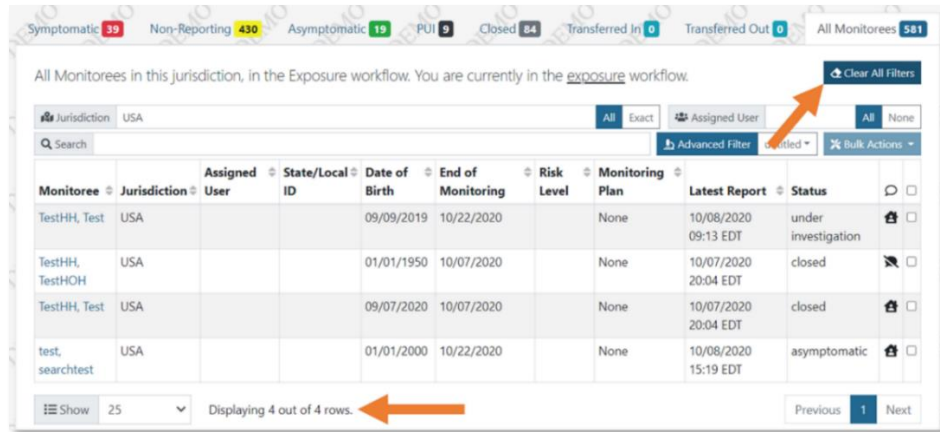


Figure 81: The total number of monitorees that meet the filter parameters is shown at the bottom of the page. The “Clear All Filters” button will clear the filter

### 9.1.9.3.2 Save the Current Filter

Users can save custom filters for future use. To save a filter:

1) Click the “Advanced Filter” button to show the current filter parameters.

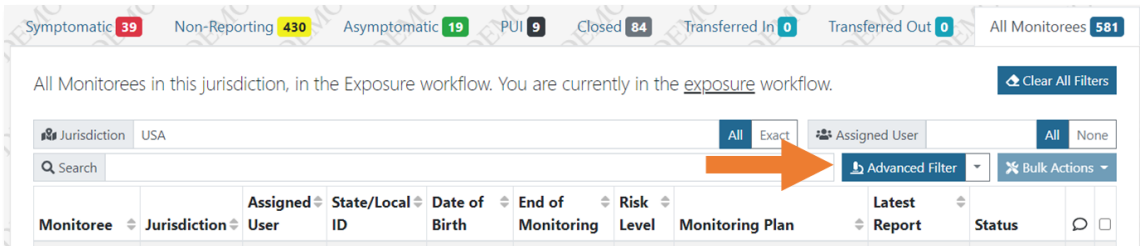


Figure 82: Click “Advanced Filter” to open the filter window

2) After setting the desired parameters, click “Save” to save the filter.

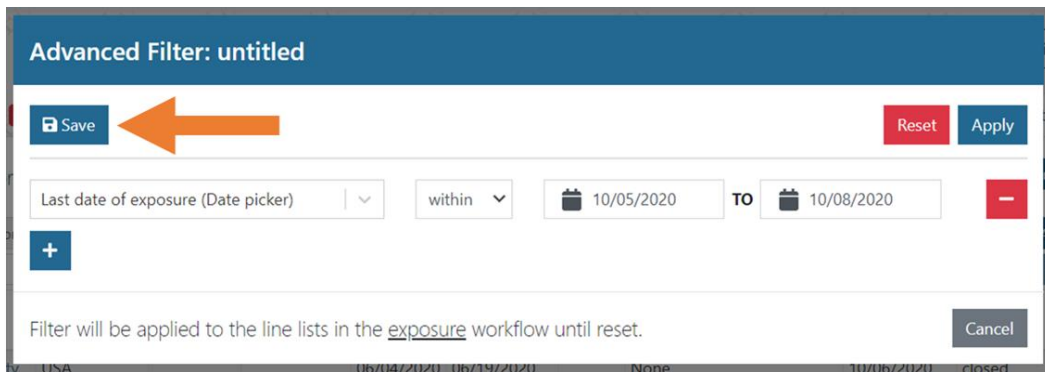
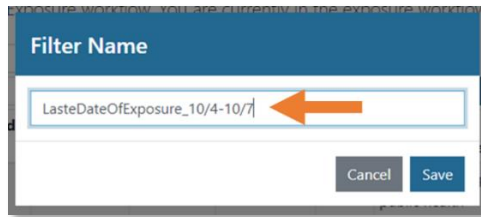


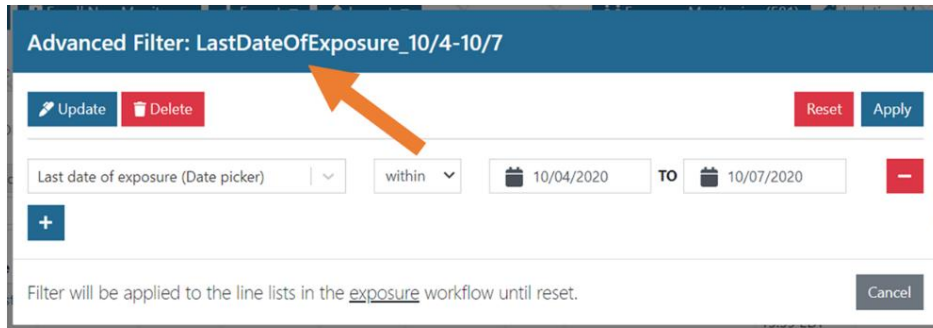
Figure 83: Click “Save” to save the filter

3) You will be prompted to name the filter. Enter a name and click “Save” to complete the process. **NOTE:** Filters cannot be renamed once saved.



**Figure 84: Name your filter**

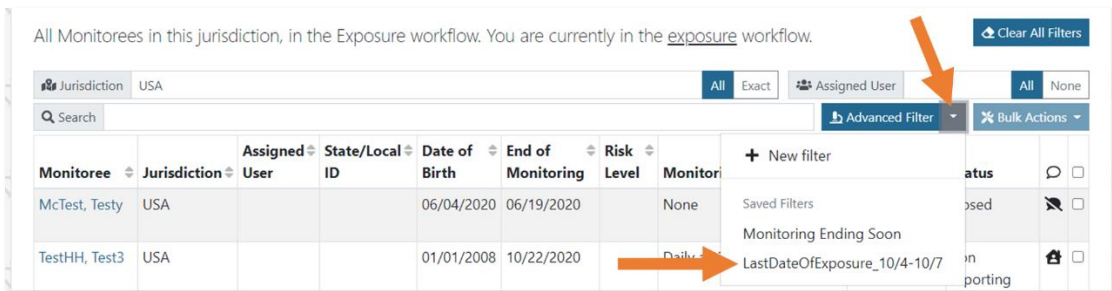
4) Note where the current filter name is displayed in the Advanced Filter window.



**Figure 85: Note where the filter name is displayed**

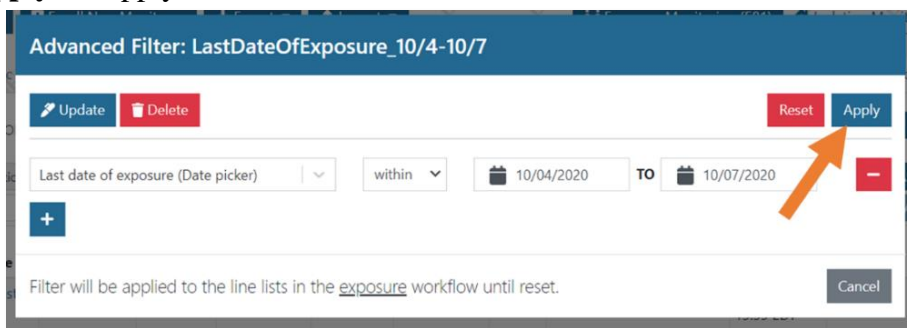
**9.1.9.3.3 Apply, Update, or Delete a Saved Filter**

1) You can see all saved filters by opening the Advanced Filter drop-down menu from the dashboard. Click the filter name to open the filter.



**Figure 86: Open the Advanced Filter drop-down menu**

2) Click “Apply” to apply the filter.

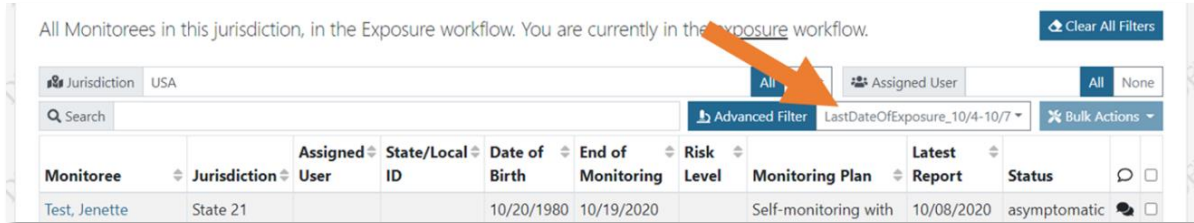


**Figure 87: Apply the filter**

3) The current advanced filter name is displayed on the dashboard. **An unsaved filter’s name will appear as “untitled.”**

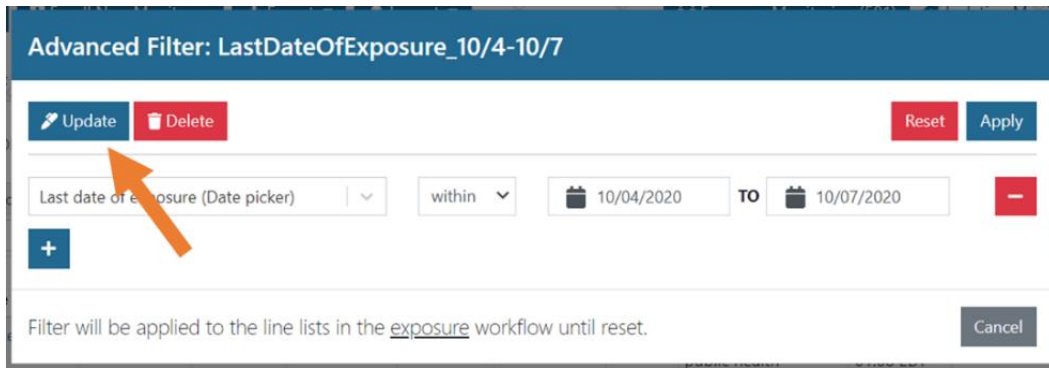
**NOTE:** Advanced filters that have not been saved (appear as “untitled”) are remembered by the system when you change line lists but are not remembered if you view a monitoree’s record and then return to the dashboard. If you would like to maintain these filters on the dashboard while working through monitoree record updates, you should open a new internet browser tab to view and update monitoree record details.

**Tip:** To open a monitoree record in a new internet browser tab to maintain your dashboard view, right-click on the monitoree name from the dashboard and select “Open link in new tab”.



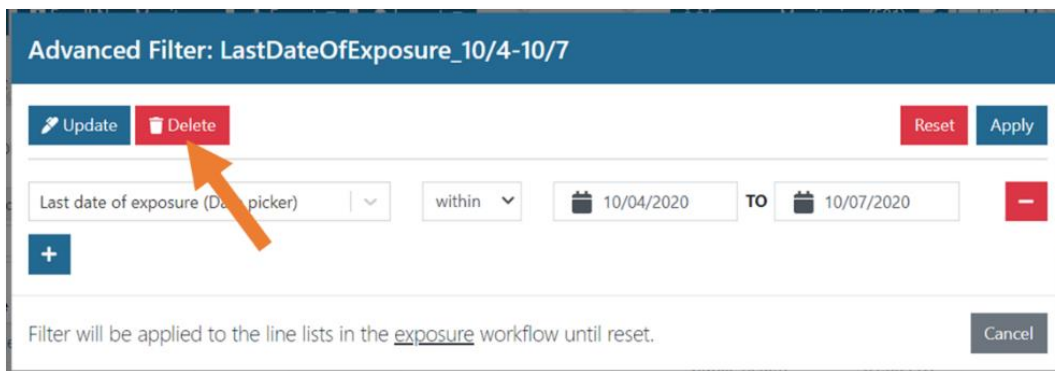
**Figure 88: The filter name is visible in the dashboard**

4) To update a saved filter, make the desired changes to the filter parameters and click “Update.”



**Figure 89: Update a saved filter**

5) Click “Delete” to delete a saved filter.



**Figure 90: Delete a saved filter**

### 9.1.10 How to Identify Heads of Households on the Dashboard

Monitorees who are Heads of Households (HoH) are indicated by an “HoH” icon: . This icon appears to the right of the monitoree’s name on the dashboard.

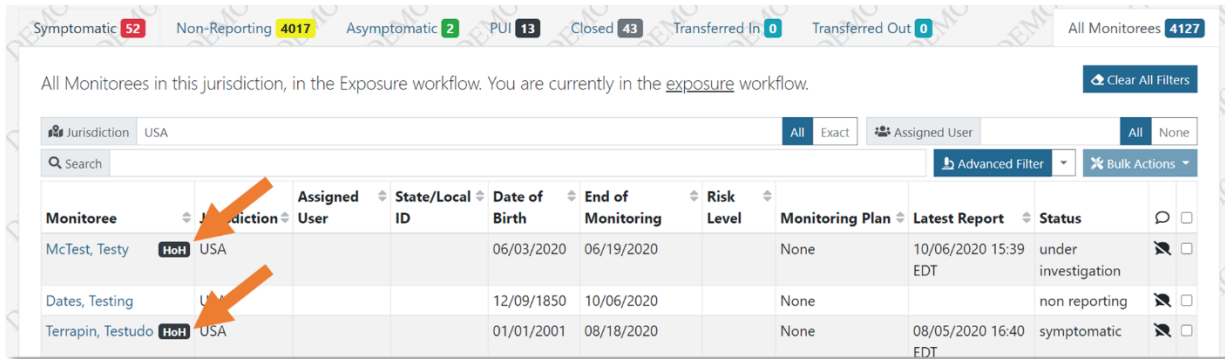







Figure 91: The “HoH” icon indicates Heads of Households

### 9.1.11 How to View Daily Notification Eligibility

A monitoree’s notification status is shown as an icon on the monitoring dashboard as well as in the caption of a monitoree’s report section. There are five possible icons:

Table 5: Monitoree Notification Status Icon Definitions

Icon	Meaning
	Monitoree is eligible to receive notifications from the system and is scheduled to receive one later today.
	The monitoree is eligible to receive notifications and has already responded today
	The monitoree is eligible to receive notifications and the system is waiting for a response.
	The monitoree is not eligible to receive notifications from the system
	The monitoree is in a household, but not the head of household, so they will not receive notifications directly from the system. The Head of Household receives notifications instead.

1) View the icon in the notification column. If you hover your cursor over the icon for a specific monitoree, you will see a detailed explanation of why a monitoree has a given status.

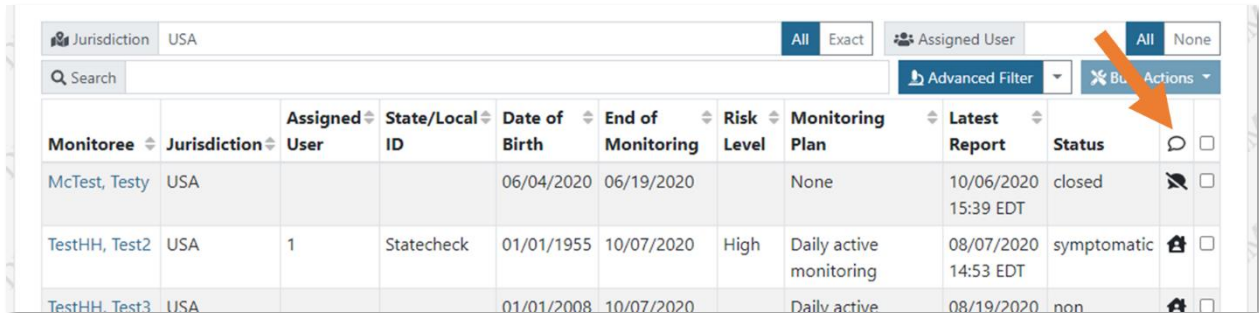


Figure 92: The notification column in the user dashboard

### 9.1.12 How to Make Updates for Multiple Monitoree Records in the Same Line List from Dashboard

Public health and Public Health Enroller users can update multiple monitorees in a line list at a time using the Actions menu. The list of available actions will increase over time.

1) Select the records to modify by clicking the checkbox located in the rightmost column.

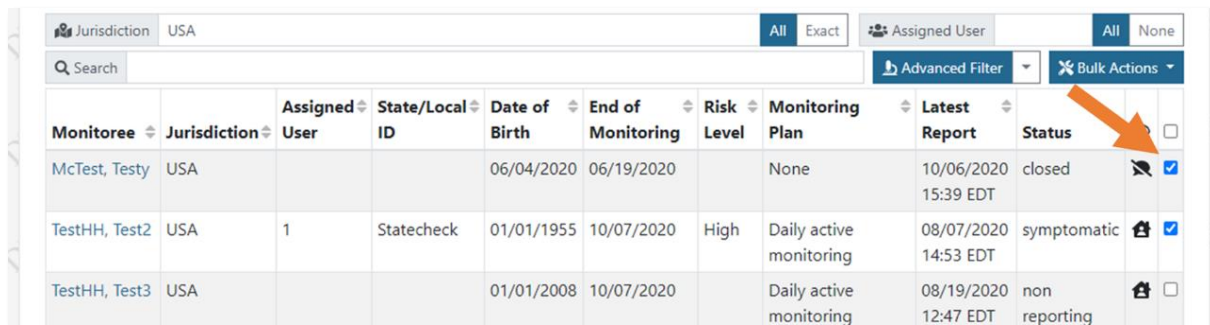


Figure 93: Select the records to modify

Select all records shown by clicking the topmost checkbox. Users can update up to 100 records at once by changing the “Show entries” box and clicking the checkbox at the top of the column.

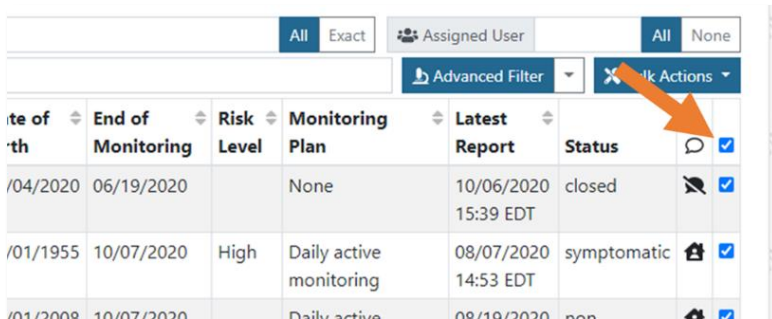


Figure 94: Click the topmost checkbox to select all records shown

2) Click “Actions” and select the appropriate action that you would like to apply to the selected monitoree records. If updating **Case Status**, the user should choose the appropriate new Case Status and workflow for the group as normal. If the selected monitorees share a common Case Status, it will appear in the top field by default.

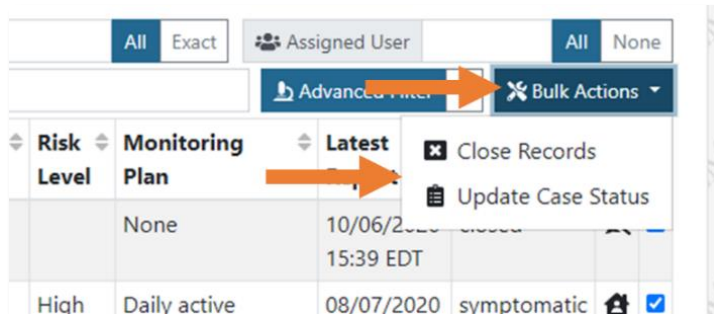


Figure 95: Click "Actions" to open the drop-down of potential actions

3) To apply the selected changes to members of the household the selected monitorees are responsible for (if applicable), click the toggle for “Apply this change to the entire household that this monitoree is responsible for, if it applies”. This will apply the action to all selected records **AND** all household members of all selected records.

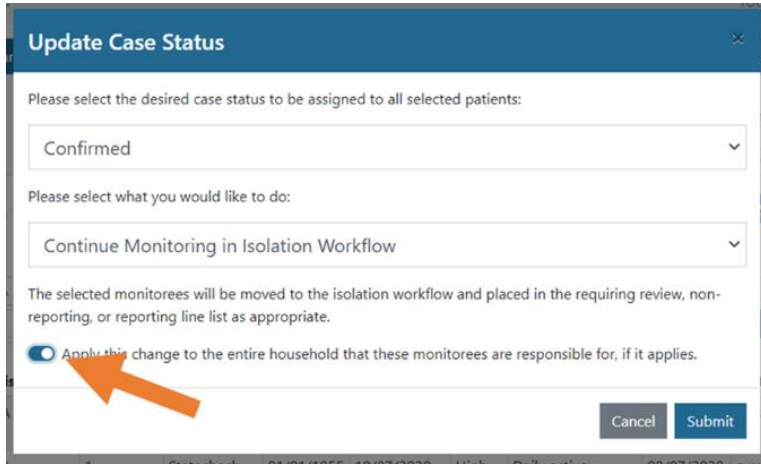


Figure 96: Click toggle to apply changes to the monitoree’s entire household

4) Click “Submit” to save the changes and complete the action.

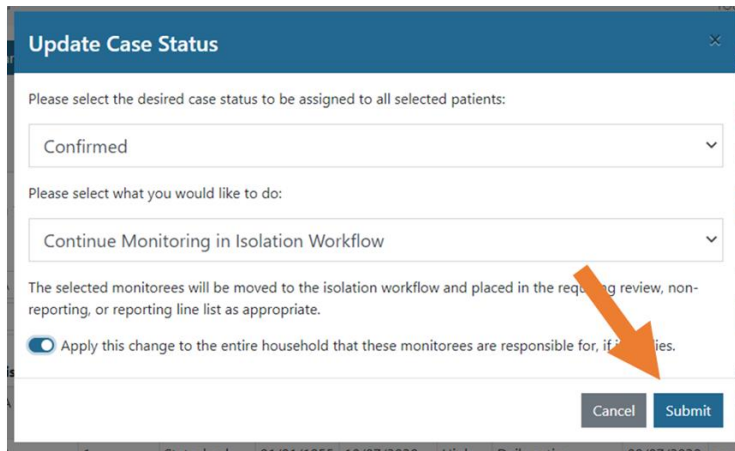


Figure 97: Click "Submit" to save the changes and close the window

## 9.2 Dashboard Functions (Exposure Workflow)

The exposure monitoring workflow allows public health officials 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.

**TIP:** See the [Possible Scenarios for Exposure Monitoring Quick Start Guide](#)

### 9.2.1 How to Move Monitorees Between Line Lists on Exposure Workflow Dashboard

A video tutorial for this section are available at: [saraalert.org/public-health/tutorial-videos/](https://saraalert.org/public-health/tutorial-videos/)

**TIP:** See the [Possible Scenarios for Exposure Monitoring Quick Start Guide](#)

### 9.2.1.1 From Symptomatic Line List to Non-Reporting or Asymptomatic Line List

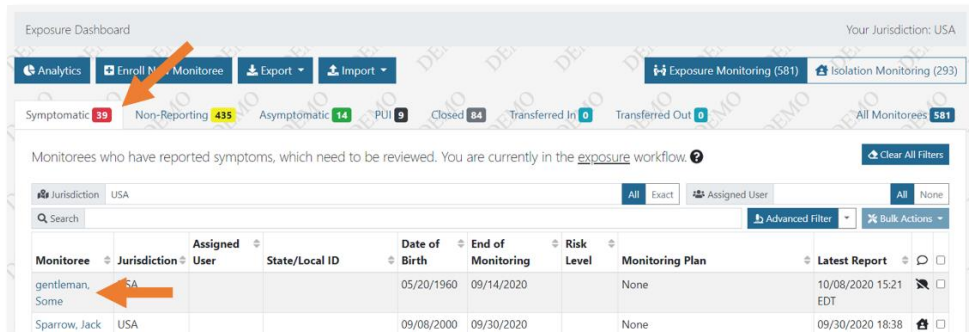
Monitorees who have a **Symptom Onset Date** appear on the Symptomatic line list. See **page 27** for a description of how **Symptom Onset Date** is generated. If a public health official follows up with a monitoree and determines that the symptoms connected to the **Symptom Onset Date** are not clinically compatible with the disease of interest, the user should take the following steps **in the following order** to move the monitoree off of the Symptomatic line list.

- 1) Remove the symptomatic flag from any reports of symptoms that are determined to be **unrelated** to the disease of interest by using the “**Review**” functionality.
- 2) If a **Symptom Onset Date** that was manually entered by a user is determined to not reflect the onset of symptoms related to the disease of interest, delete the **Symptom Onset Date** field.

These steps are explained in greater detail below. After making these changes, the system will move the monitoree out of the “Symptomatic” line list to either the “Asymptomatic” line list unless the most recent report is older than 24 hours, in which case they will move to the “Non-Reporting” line list.

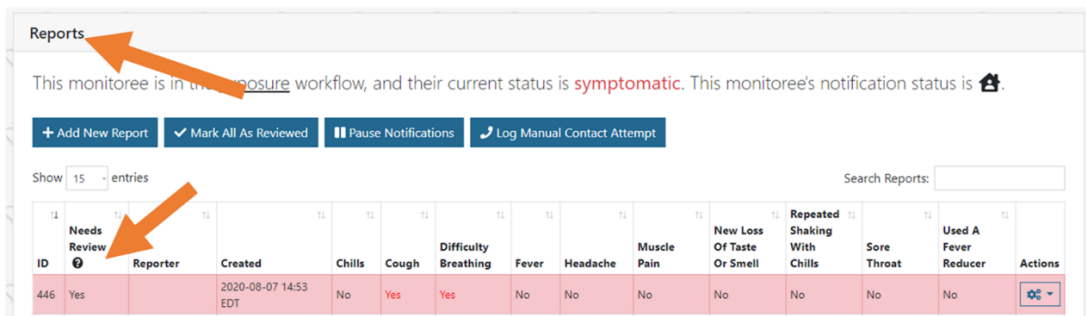
#### 9.2.1.1.1 Mark Symptomatic Reports as Unrelated to the Disease of Interest Using “Review”

- 1) Click on the “**Symptomatic**” line list to view monitorees who reported symptoms and require public health review. Click on a monitoree’s name to view their record.



**Figure 98: View a symptomatic monitoree’s record**

- 2) Scroll down to view “**Reports.**” Reports flagged as “symptomatic” by the system are highlighted in red. The public health user should follow up with the individual to assess the symptom report and determine appropriate next steps. If disease is suspected, see instructions on how to a move a monitoree to the PUI line list (**page 73**) or the isolation workflow (**page 86**).



**Figure 99: Monitoree reports table shows symptoms by report date and time**

3) If after review, the disease of interest is **NOT** suspected (e.g., another clinical explanation or data entry error), clear the symptomatic flag from a specific symptom report by first clicking that report’s “**Actions**” button to open the drop-down menu. Then click “**Review**”. If the earliest symptomatic report is **Reviewed** and the **Symptom Onset Date** was never manually entered, the **Symptom Onset Date** will change to match the date of the next earliest report.

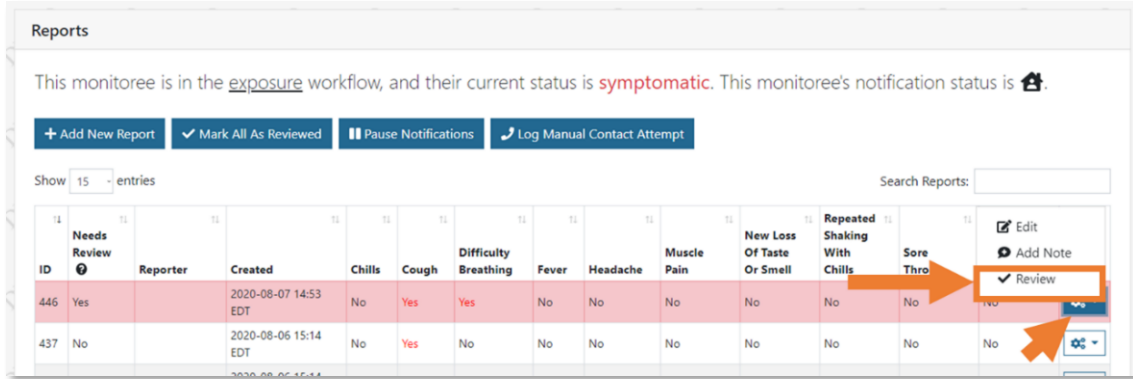


Figure 100: Mark a single report as reviewed

4) A user can also clear all symptomatic flags from all of a monitoree’s symptom reports by clicking “**Mark All As Reviewed**” to indicate that the disease of interest is not suspected after review of this monitoree’s symptom report(s). The symptom onset date field will also be cleared unless a date has been entered by a user. Any changes to **Symptom Onset Date** are logged in the record’s history.



Figure 101: Mark the report as reviewed to move the monitoree out of the “Symptomatic” line list

5) If you choose to mark all records as reviewed, carefully note the resulting logic that is described in the confirmation window.

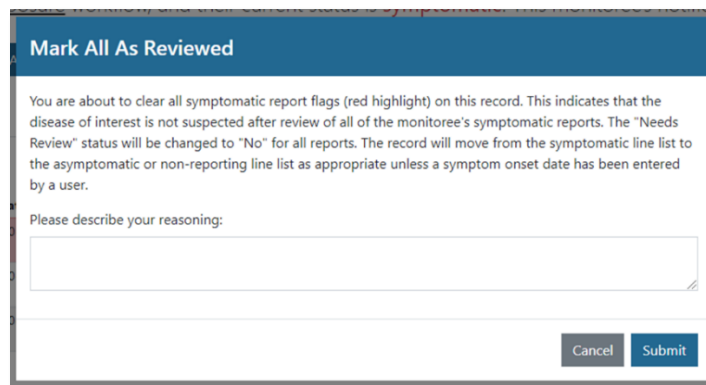


Figure 102: Note the logic for marking symptom reports as reviewed



6) The symptom onset date will reset unless a date had been manually entered.

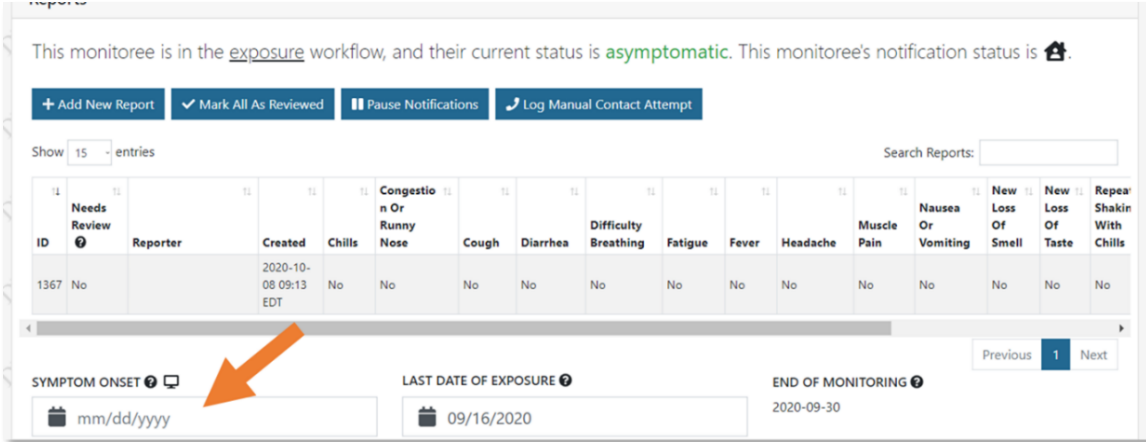


Figure 103: The symptom onset date has reset

9.2.1.1.2 Clear a Manually Entered Symptom Onset Date

If a user manually entered a **Symptom Onset Date** for the monitree, using the “Review” functionality for symptomatic reports will not clear this date. The monitree will remain on the symptomatic line list until the **Symptom Onset Date** is manually cleared by the user and all reports have been marked as reviewed.

**NOTE:** A symbol will appear to the right of the Symptom Onset Date field which indicates if the date has been auto-populated by the system or defined by a user.

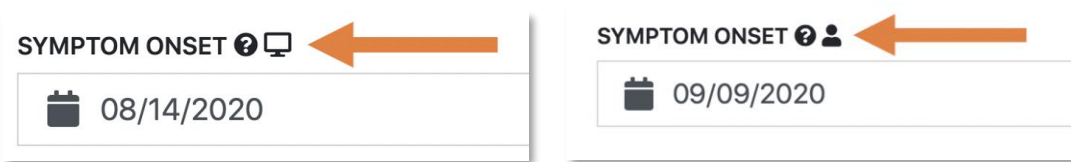


Figure 104: Symbols for System (left) and User-Defined (right) Symptom Onset Date

1) To clear the **Symptom Onset Date**, highlight the date and delete it.

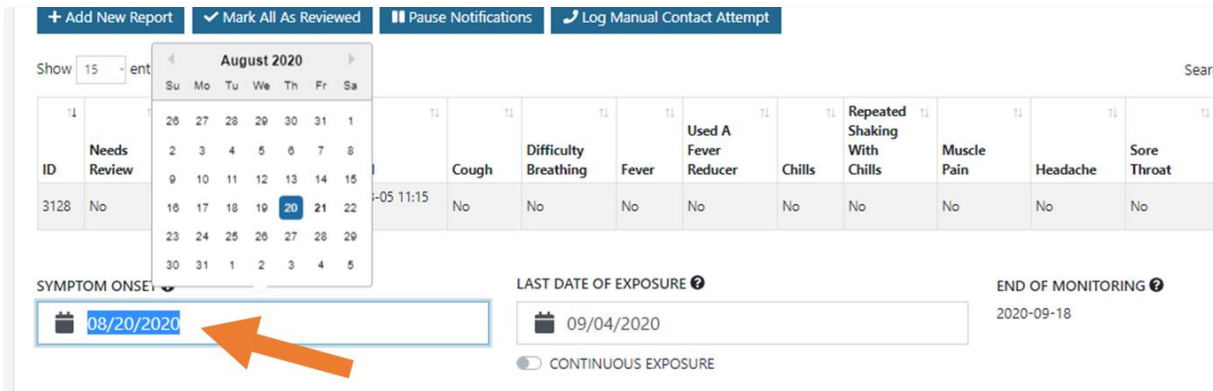


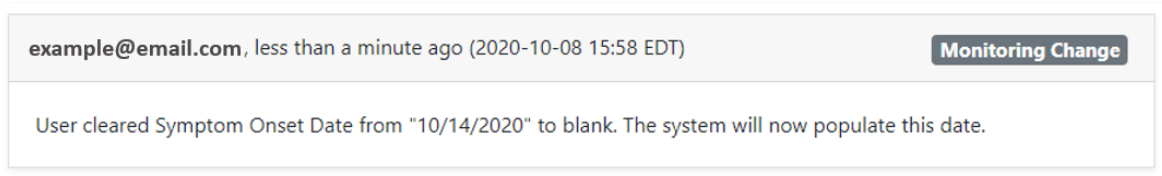
Figure 105: Highlight and Delete the Symptom Onset Date

2) The system will now auto-populate this field as the date of the earliest report that needs review, if any. If all reports have been marked as reviewed, this field will appear blank and will be auto-populated if a symptomatic report is received. The change will be noted in the History section and tagged as a “Monitoring Change”.

3) Once the date has been cleared, either of the following results will occur, depending on whether the monitoree has symptomatic, unreviewed reports:

- If there **are** symptomatic, unreviewed reports for this monitoree:
  - The system will auto-populate Symptom Onset Date with the date of the earliest unreviewed symptomatic report.
  - To clear the new Symptom Onset Date, review all such reports (see **page 70**).
- If there **are not** symptomatic, unreviewed reports for this monitoree:
  - The monitoree will move to the Asymptomatic or Non-Reporting Line list.
  - The Symptom Onset Date will automatically re-populate with the date of any **subsequent** symptomatic reports.

4) The change will be captured in the “History” section of the monitoree’s record.

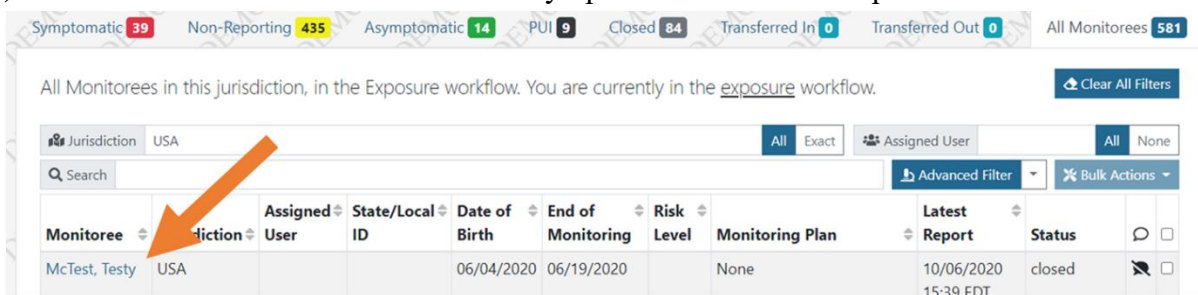


**Figure 106: Changes will be captured in the History section**

### 9.2.1.2 Moving a Monitoree to the PUI Line List

Symptomatic monitorees who public health officials are investigating to determine if the monitoree meets the case definition can be moved from the “Symptomatic” tab to the “PUI” tab by documenting a public health action.

1) Click on the monitoree’s name on the “Symptomatic” line list to open their record.



**Figure 107: Click on a monitoree’s name to open their record**

2) Under “Monitoring Actions” change the “Latest Public Health Action” to anything other than “None.” You will be prompted to include any additional details.

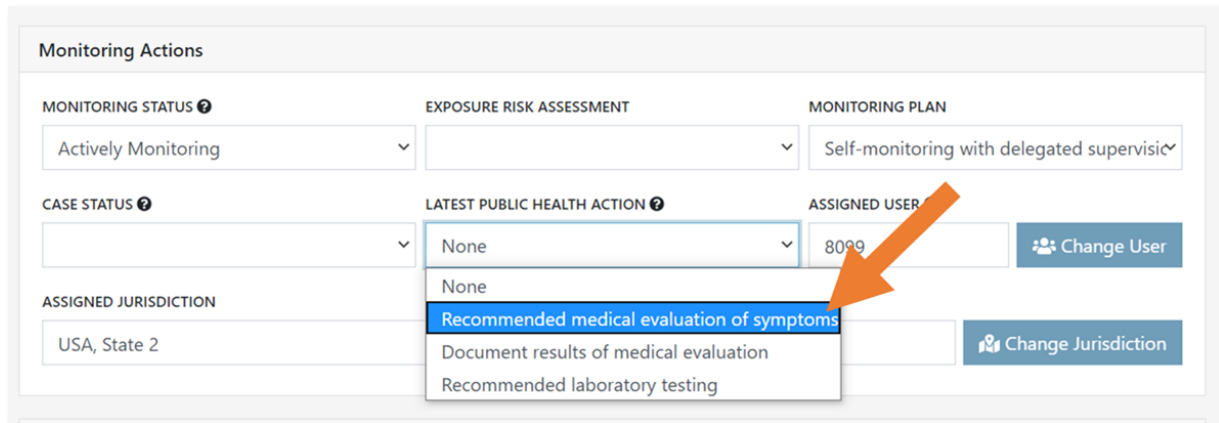


Figure 108: Select a public health action to move a monitoree to the “PUI” list

3) The monitoree record will be updated and moved to the “PUI” line list. This monitoree will continue to receive daily report requests from the system.

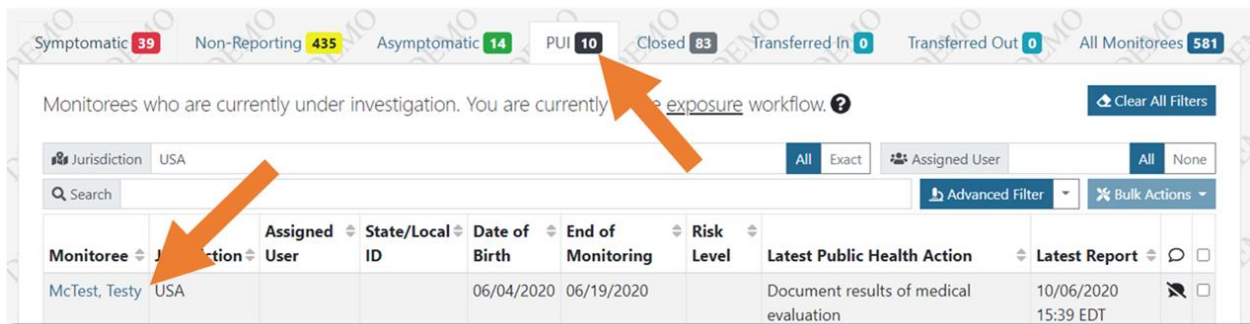


Figure 109: The monitoree now appears in the “PUI” line list

## 9.3 Dashboard Functions (Isolation Workflow)

The isolation monitoring workflow allows public health to monitor cases daily to determine when they meet the recovery definition and it is safe to discontinue home isolation. A video tutorial for this section is available at: [saraalert.org/public-health/tutorial-videos/](https://saraalert.org/public-health/tutorial-videos/)

**Tip:** See the [Quick Start Guide for Public Health Users: Isolation Workflow](#)

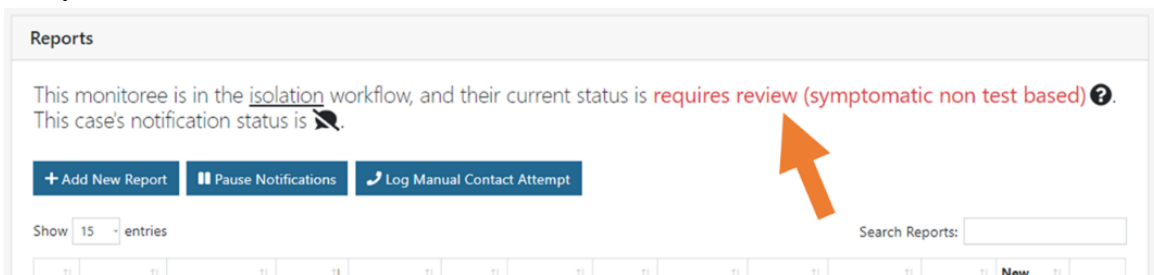
### 9.3.1 Move Monitorees Between Line Lists on Isolation Workflow Dashboard

#### 9.3.1.1 From Reporting Line List to Records Requiring Review

Sara Alert™ will signal that a case meets the logic to appear on the “Records Requiring Review” line list by moving the record there. The system automatically moves records when any of the conditions, based on the CDC recovery definitions, on **page 31** are met. Any cases that appear on this line list require review by public health to validate that it is safe to discontinue

**Tip:** See the [Possible Scenarios for Isolation Monitoring Quick Start Guide](#)

isolation. While the *symptom non test-based* condition relies only on data supplied by the monitorees, the *test-based* and *asymptomatic based* logic requires input from public health users (i.e., documentation of relevant laboratory tests). To help orient users to which information needs to be validated, the monitoring status located at the top of the reports section specifies which recovery definition was met.



**Figure 110: The recovery definition met is shown on each record that requires review**

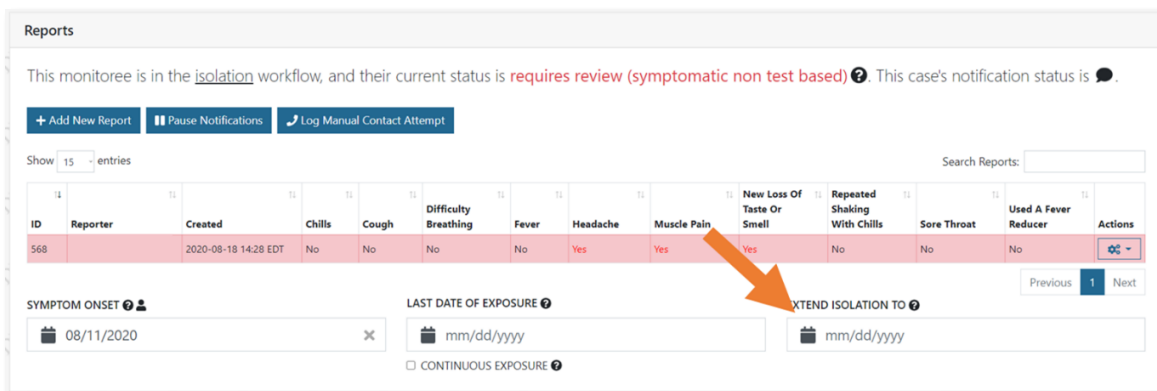
**NOTE:** Newly enrolled or imported cases for whom the symptom onset date is >10 days ago AND for whom one symptom report that meets the recovery definition reporting requirements has been submitted may show up on the “Records Requiring Review” list. This is because the system does not have a report to indicate otherwise that this monitoree has NOT been asymptomatic for longer (e.g., 72 hours which meets the symptomatic non test-based definition).

### 9.3.1.2 From Records Requiring Review to Reporting or Non-Reporting Line List by Extending Monitoring

When a monitoree meets any of the system’s recovery definitions (see page 31) they will automatically move from the Reporting or Non-Reporting line lists to the Records Requiring Review line list. This flags the monitoree as someone who may be able to be removed from isolation. If, after following up with the monitoree, a user determines this individual should not yet be removed from isolation, they can extend isolation by setting or updating the **Extend Isolation To** date in the monitoree’s record.

If a user sets an **Extend Isolation To** date, the monitoree will not be eligible to appear on the Records Requiring Review list until that date has passed (and they again meet one of the system’s recovery definitions).

1) Click on the monitoree’s record and scroll to the Reports section. The **Extend Isolation To** field is located below the Reports table.



**Figure 111: Update relevant information that system uses to determine if recovery is met**

2) Adding a current or future **Extend Isolation To** date will move the monitoree to either the Reporting or Non-Reporting line list until that date has passed.

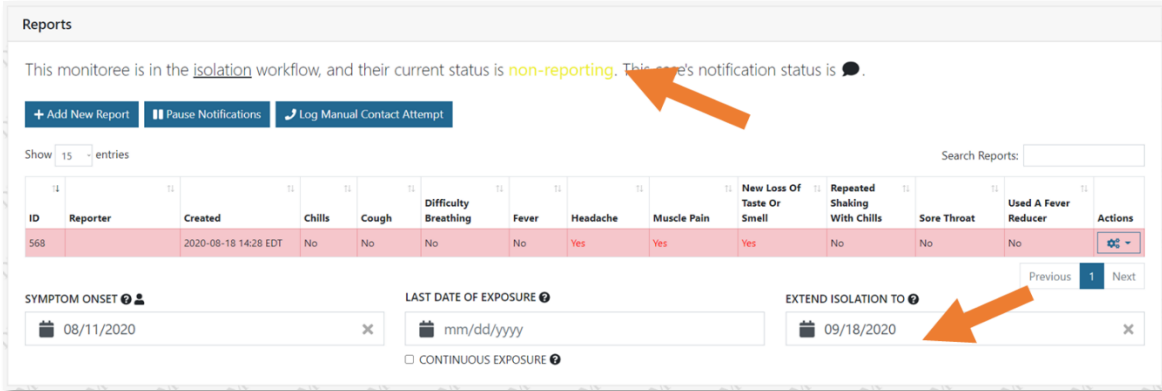


Figure 112: The record will be moved to appropriate line list

3) The monitoree’s **Extend Isolation To** date is visible on the dashboard. This monitoree is not eligible to appear on the Records Requiring Review line list at least until this date has passed and a recovery definition is met.

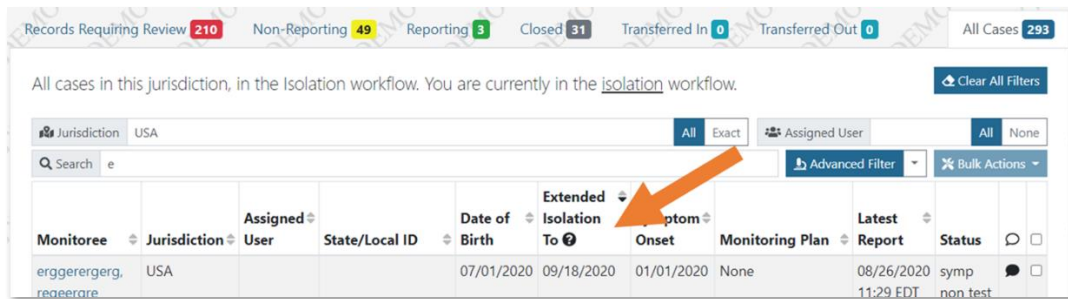


Figure 113: The Extend Isolation To date is visible on the dashboard

## 9.4 Individual Monitoree Record Functions (Both Workflows)

### 9.4.1 How to Transfer a Monitoree Record

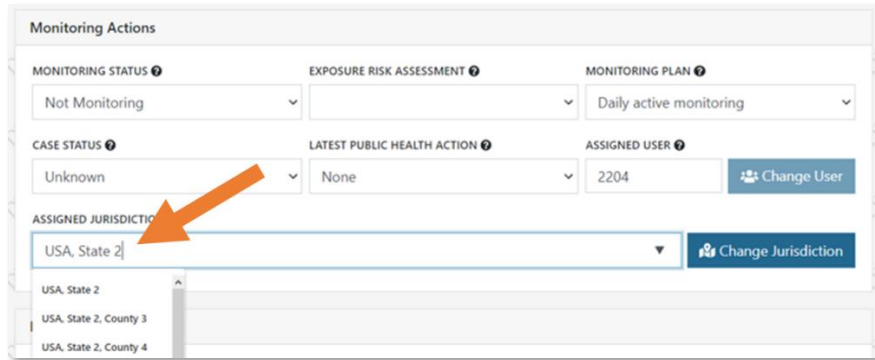
**NOTE:** While this section shows images of the Exposure Dashboard, the same instructions apply to the Isolation Dashboard.

A public health user can transfer a monitoree **to another jurisdiction that uses Sara Alert™** by updating the jurisdiction of the monitoree’s record. If the public health user does not have access to the updated jurisdiction (e.g., in the case of a transfer to another state), the user will no longer have access to details of that monitoree’s record.

If a jurisdiction needs to keep complete record information to comply with record retention policies, the record should be exported prior to transfer (See instructions on **page 50**).

1) After selecting the record of interest, **clear the “Assigned Jurisdiction” and begin to type the transfer jurisdiction name**. A list of jurisdictions that match the search parameters will appear. Select the appropriate jurisdiction. Only jurisdictions who are using Sara Alert™ appear in the drop-down. If the transfer jurisdiction is not listed, the monitoree record cannot be

transferred using this functionality and will need to be transferred to the destination jurisdiction manually (e.g., encrypted email, phone call, etc.)



**Figure 114: Start to type the name of the jurisdiction to view list of available jurisdictions**

2) Click “Change Jurisdiction.”

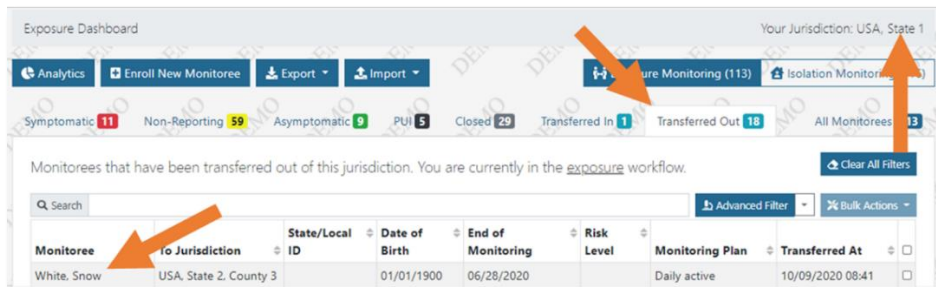


**Figure 115: Change the jurisdiction to the new "Assigned Jurisdiction"**

3) Add comments to document the reason for transferring the monitoree to another jurisdiction (i.e., moved, changed address, etc.) and click “Submit.” These comments will become part of the record history.

- The record will appear on the new jurisdiction’s “**Transferred In**” line list for 24 hours after the user clicks “**Submit**”. The new jurisdiction is now able to modify the record.
- After transferring a record out of user’s jurisdiction, the record will only be accessible by users in the new jurisdiction. Data from a limited set of fields for each transferred record will appear on the “**Transferred Out**” line list, but the record will not be able to be accessed. If a record was transferred in error, the receiving jurisdiction should be contacted. The “**Transferred Out**” line list includes all records that were transferred out in the past 14 days.

**NOTE:** If a record is transferred by mistake, the public health user will need to contact a user at the new jurisdiction to have the record transferred back.



**Figure 116: The monitoree now appears in the “Transferred Out” tab (Note that the monitoree’s name is no longer clickable)**

4) The monitoree’s record will appear in the receiving jurisdiction’s “**Transferred In**” line list for 24 hours. The record will also appear on the appropriate monitoring line list (e.g., “Symptomatic,” “Non-Reporting,” “Asymptomatic”, “PUJ”, “Closed”).

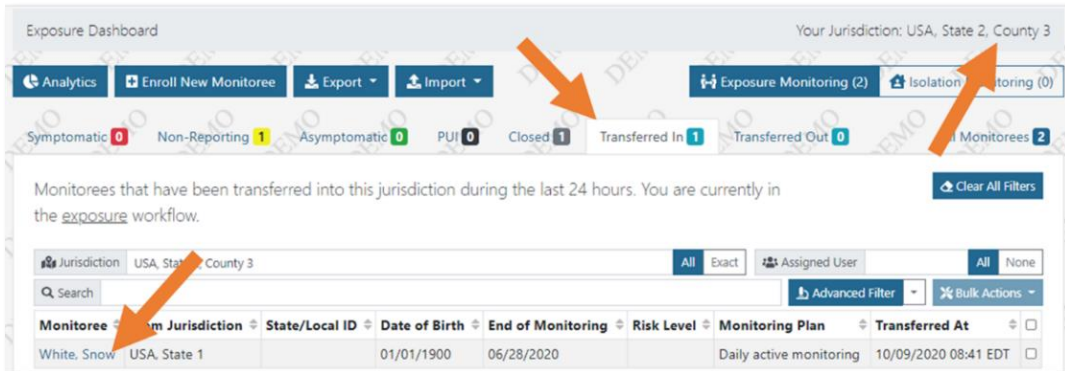


Figure 117: The monitoree has moved to the new jurisdiction

### 9.4.2 How to Log a Manual Contact Attempt

For monitorees that require follow-up, users can now easily document manual contact attempts made by public health users (e.g., phone calls or home visits).

**NOTE:** If contact cannot be established or reestablished, users should follow local protocols for when to close a record due to loss to follow-up. See **page 78** for details on how to close a record.

1) Under “**Reports**” Select “**Log Manual Contact Attempt**”.

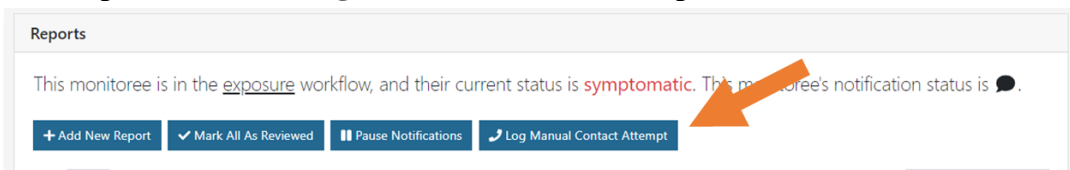


Figure 118: Select “Log Manual Contact Attempt”

2) Select if contact attempt was successful or unsuccessful and click “**Submit**”.

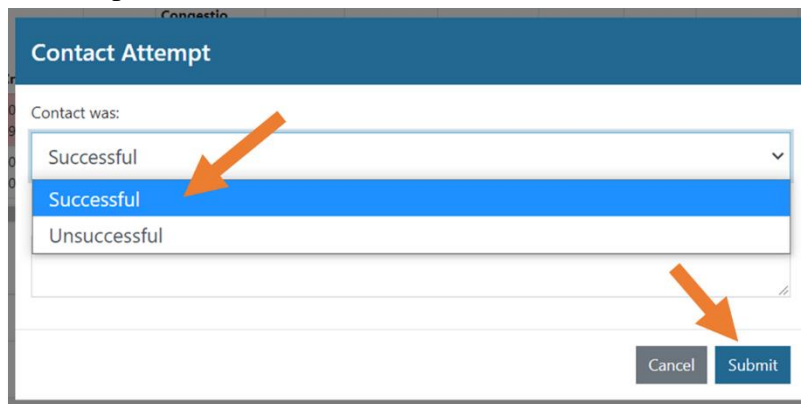


Figure 119: Document the results of the attempt

3) The contact attempt and outcome will be logged in the History section

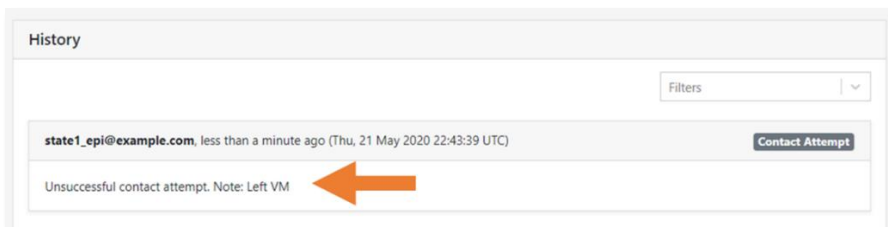


Figure 120: Outcome logged in History

### 9.4.3 How to Add a Symptom Report to a Monitoree Record

A public health user may need to add a daily assessment report on behalf of a monitoree.

**NOTE:** The symptom report create date is logged by the system. The report date cannot currently be associated with a past date/time. A note can be associated with the report if needed to clarify the report date.

1) After selecting the monitoree’s record of interest, select “Add New Report” to enter a new report on behalf of monitoree.

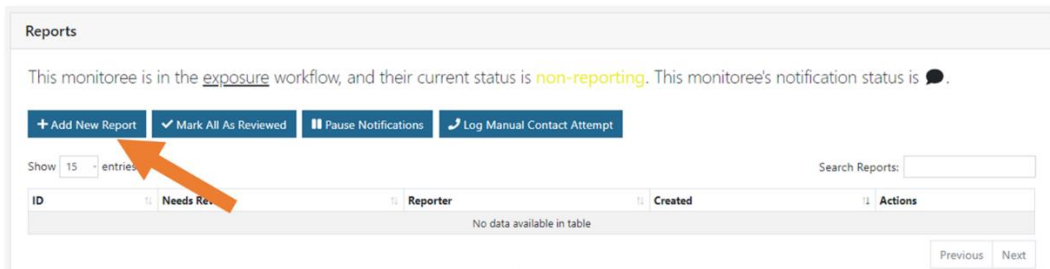


Figure 121: A public health user may add a report on behalf of the user

2) Complete the Daily Report and click “Submit”. **NOTE:** The symptoms assessed on the daily self-report are subject to change based on latest CDC and CSTE guidance.

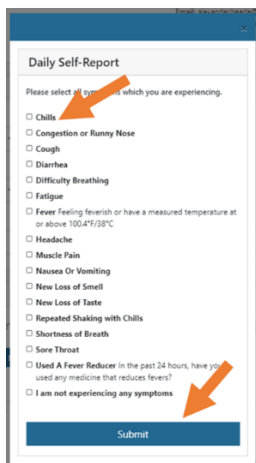


Figure 122: Complete the daily report of symptoms



3) The username of who submitted the report will be logged in the “Reporter” column. Note that the record’s status has changed to “Symptomatic”.

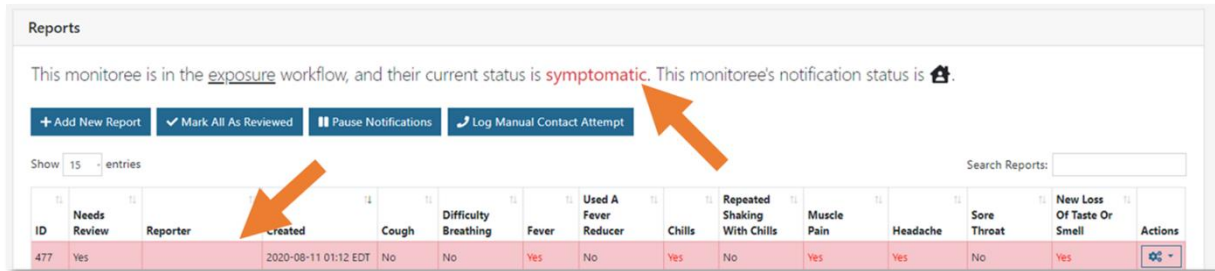


Figure 123: A public health user may modify an existing report

If using the system in a small browser window or on a small screen, a user may need to side scroll to view the full list of symptoms. A scroll bar will appear if the system is unable to show the full list of symptoms at once:



Figure 124: Use the scroll bar to see the full list of symptoms

### 9.4.4 How to Modify an Existing Symptom Report

A public health user can modify a monitoree report if necessary (e.g., to fix a data entry error).

1) Find the report of interest and click the actions button to open the drop-down menu. Select “Edit” to modify the report.

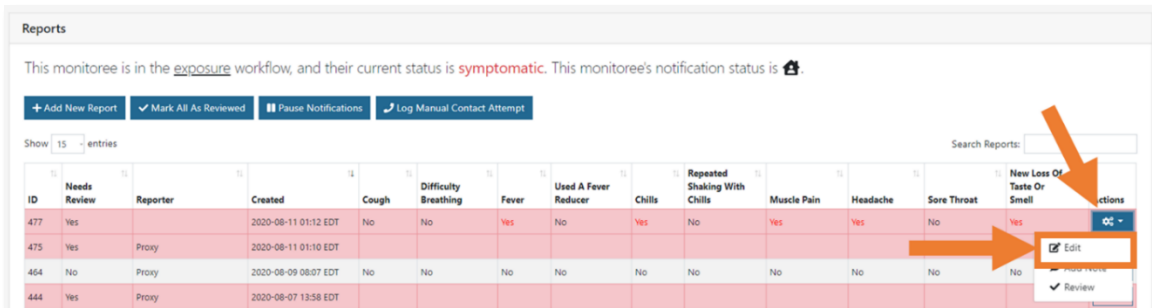


Figure 125: A public health user may modify an existing report

2) Update the daily report and click “**Submit.**” **NOTE:** The symptoms displayed in the daily self-report are subject to change based on latest guidance.

**Daily Self-Report**

Please select all symptoms which you are experiencing.

- Chills
- Congestion or Runny Nose
- Cough
- Diarrhea
- Difficulty Breathing
- Fatigue
- Fever Feeling feverish or have a measured temperature at or above 100.4°F/38°C
- Headache
- Muscle Pain
- Nausea Or Vomiting
- New Loss of Smell
- New Loss of Taste
- Repeated Shaking with Chills
- Shortness of Breath
- Sore Throat
- Used A Fever Reducer In the past 24 hours, have you used any medicine that reduces fevers?
- I am not experiencing any symptoms

**Submit**

**Figure 126: Update the daily report**

3) Note the changes to reported symptoms in the “**Reports**” table.

**Reports**

This monitoree is in the exposure workflow, and their current status is **symptomatic**. This monitoree's notification status is **...**

+ Add New Report | ✓ Mark All As Reviewed | || Pause Notifications | Log Manual Contact Alerts

Show 15 entries

ID	Needs Review	Reporter	Created	Cough	Difficulty Breathing	Fever	Used A Fever Reducer	Chills	Repeated Shaking With Chills	Muscle Pain	Headache	Sore Throat	New Loss Of Taste Or Smell	Actions
477	Yes		2020-08-11 01:12 EDT	No	No	No	Yes	Yes	Yes	No	Yes	Yes	No	

**Figure 127: The report has been updated**

4) The history section will document that an existing subject report was updated by a user and what change was made.

**History**

Filters

state1\_epi@example.com, less than a minute ago (Fri, 22 May 2020 13:02:14 UTC) **Report Updated**

User updated an existing report (ID: 4054). Symptom updates: chills=No, repeated-shaking-with-chills=No, sore-throat=Yes, new-loss-of-taste-or-smell=Yes.

**Figure 128: Changes are documented in History**

### 9.4.5 How to Add a Note About a Specific Symptom Report

A user can add a note for a specific symptom report.

1) Click “Add Note.”

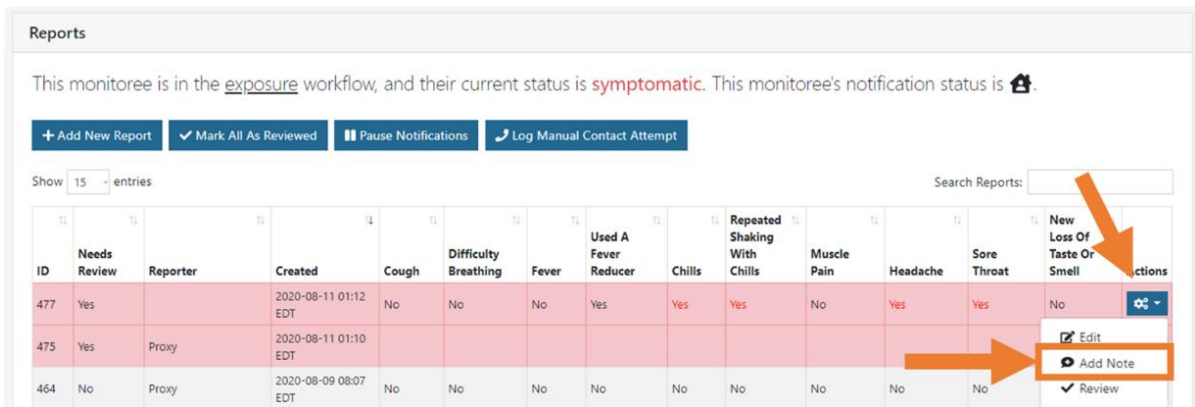


Figure 129: Add a note to a report

2) A Dialog box will appear. Input your note and click “Submit.”

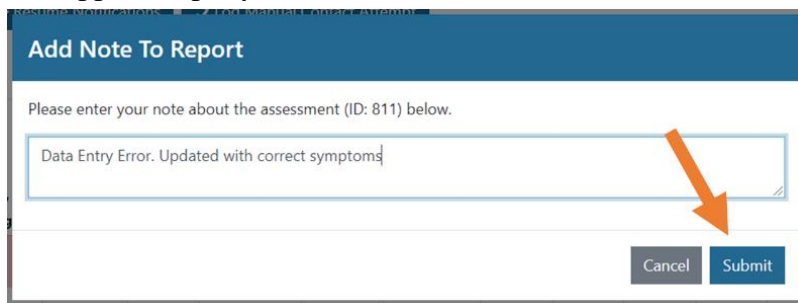


Figure 130: Enter your note into the dialog box

3) Report notes, report updates, and manually entered reports are all logged in the “History” section.

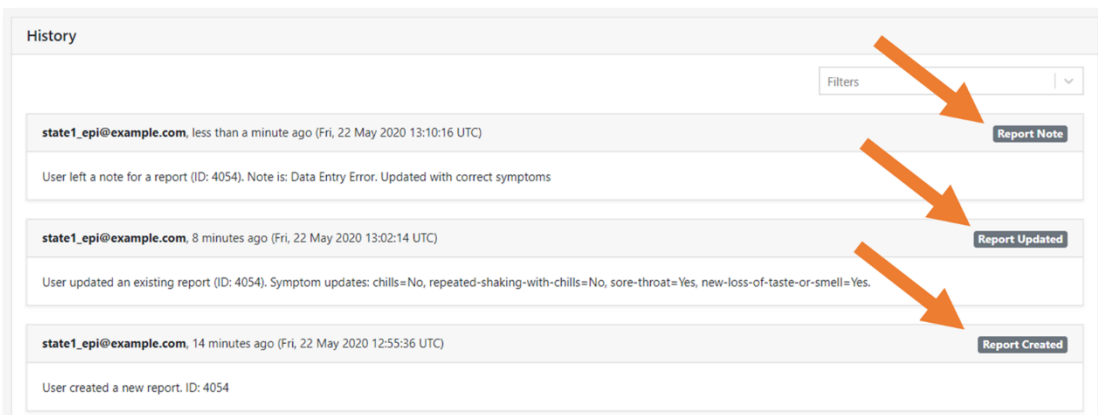


Figure 131: The “History” section tracks these types of updates to a monitoree’s record

### 9.4.6 How to Add Laboratory Results:

1) Open the monitoree’s record.

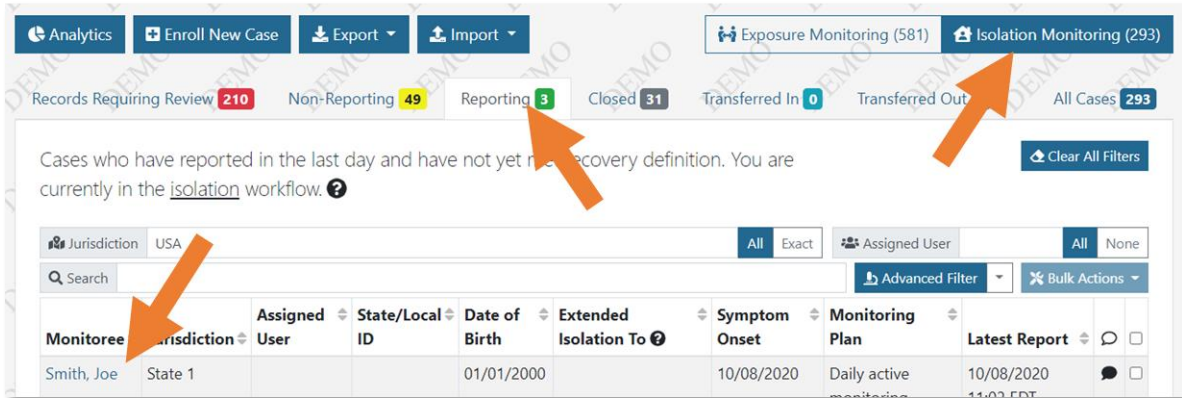


Figure 132: Open the monitoree’s record

2) To add laboratory test results, click “Add New Result” in the Lab Results section.

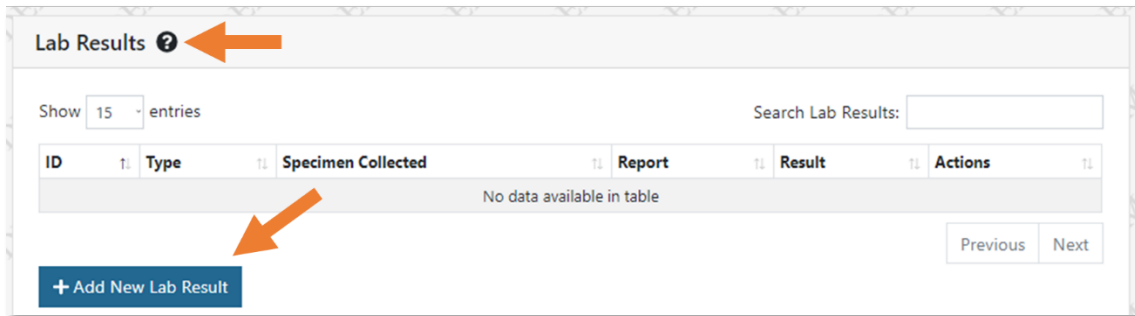


Figure 133: Add laboratory test results

3) Update fields with available data. The “Result” field is the only field currently processed for the test-based recovery definition. The other fields are provided as a minimal set of lab information required to assess if recovery definition was met.

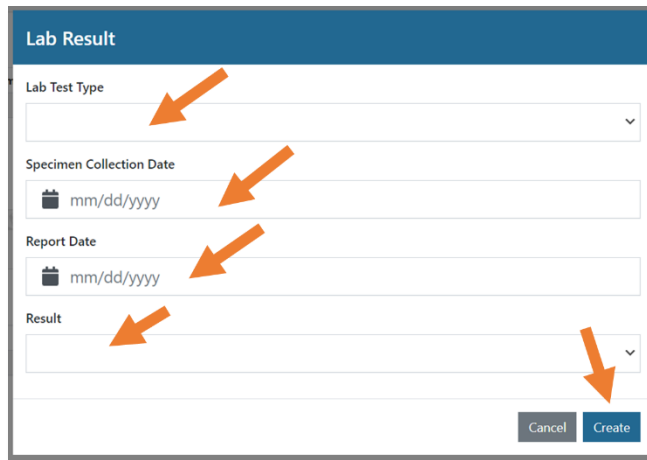


Figure 134: Add Lab Result information

4) Lab Results updates are documented in the History section.

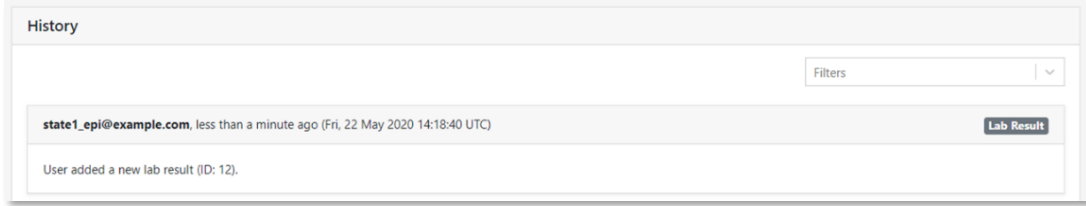


Figure 135: Sara Alert™ documents which user added lab results

### 9.4.7 Add a New Close Contact

Users can add a list of close contacts associated with a specific monitoree. Close contacts can later be enrolled in Sara Alert™ as monitorees if the close contacts require public health monitoring.

**NOTE:** Public Health users do not have the ability to **enroll** individuals directly from the close contacts table. Only Public Health Enrollers have this ability. See **page 94** for more details.

1) Open the monitoree’s record, scroll to the “Close Contacts” section, and click “Add New Close Contact”.

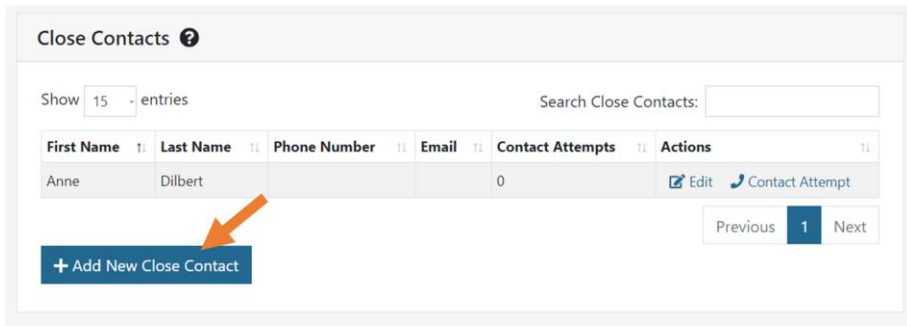


Figure 136: Click “Add New Close Contact”

2) Add any information you have collected about the close contact and click “Create”.

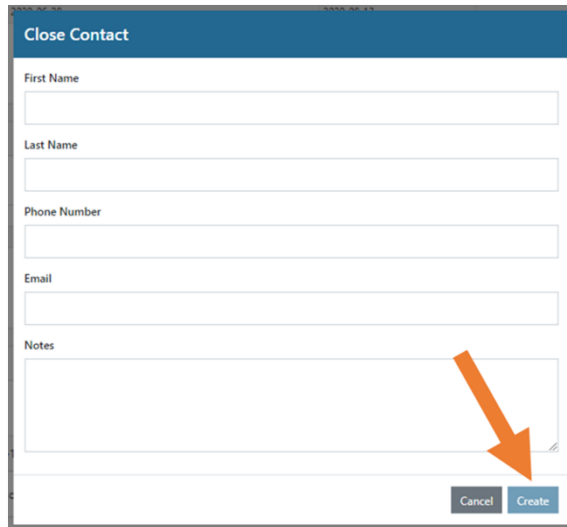
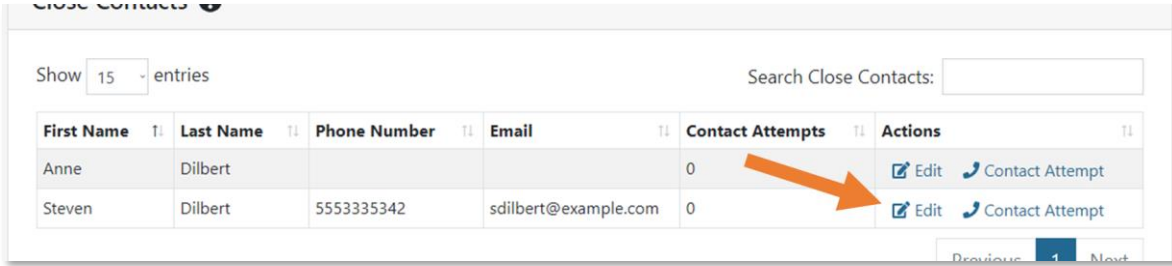


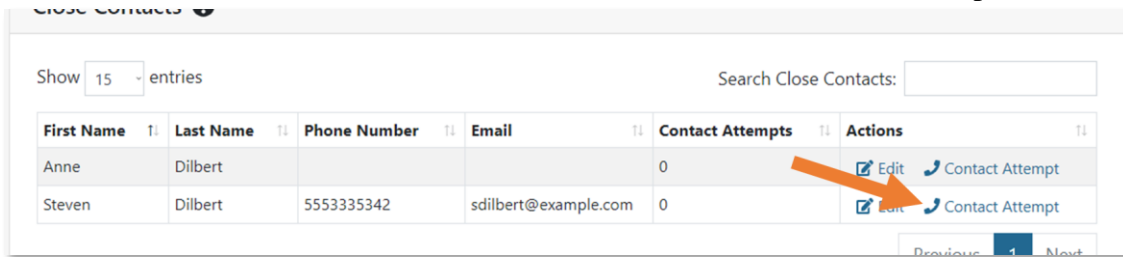
Figure 137: Add Close Contact Information

3) Click **“Edit”** (under **“Actions”**) to edit a specific close contact’s information.



**Figure 138: Click “Edit” to edit a close contact’s information**

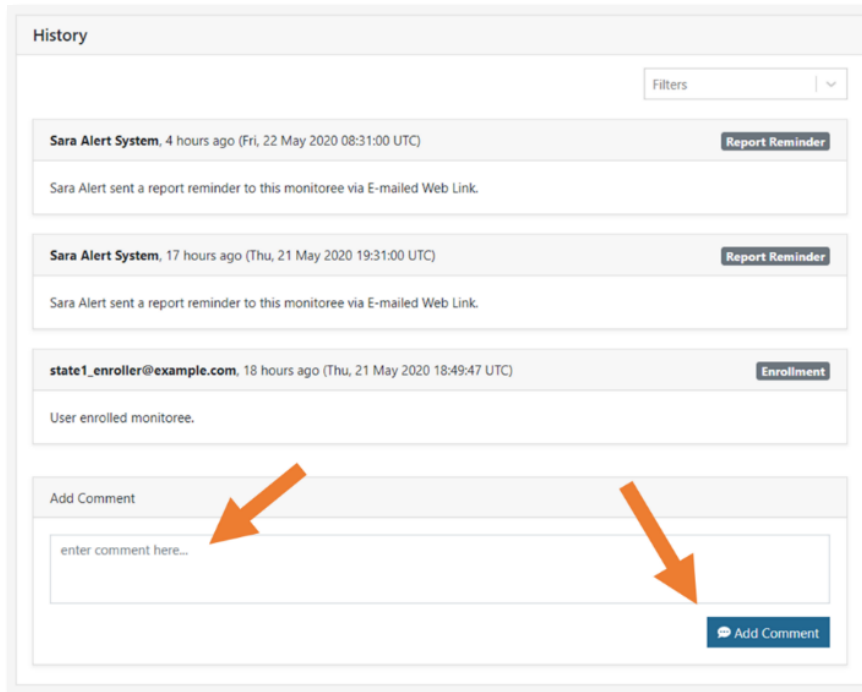
4) Click **“Contact Attempt”** (under **“Actions”**) to document an attempt to contact one of the monitoree’s close contacts. This will increase the number in the **“Contact Attempts”** column.



**Figure 139: Document a Contact Attempt**

### 9.4.8 How to Add Comments to a Record

Add comments to **“History”** section to document information not captured elsewhere. Click **“Add Comment”**. This section tracks any changes made to monitoring and report data elements. The username of the comment submitter and date of the submission is displayed.



**Figure 140: Comments show public health actions taken due to a symptom report from monitoree**

## 9.4.9 How to Filter Record History

1) Click the “Filters” field to filter based on the type of action that was recorded.

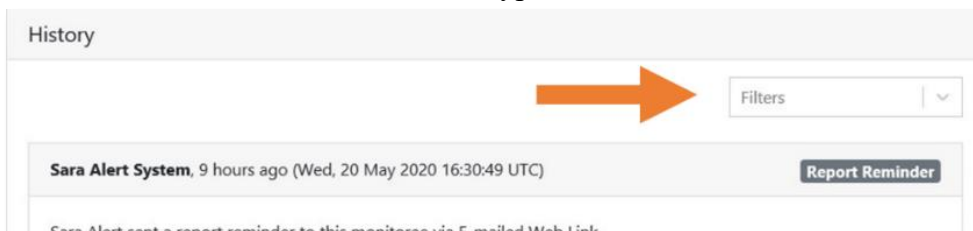


Figure 141: Filter history based on type

2) The five most recent changes are displayed on the first page. View additional changes by clicking through the numbered pages below the last record displayed.



Figure 142: Click the numbered pages below the last record to see later historical changes

## 9.4.10 Move Monitoree Records Based on Case Status to Different Workflow

An active record can be moved between the exposure and isolation workflows based on case status. This workflow is intended to move exposed individuals to the appropriate workflow after a case is ruled in or out based on the investigation.

**NOTE:** Updating “Case Status” for a record on the Closed line list will not move the record since it is not under active monitoring.

1) After investigation of a symptomatic exposed individual, select appropriate “Case Status”.

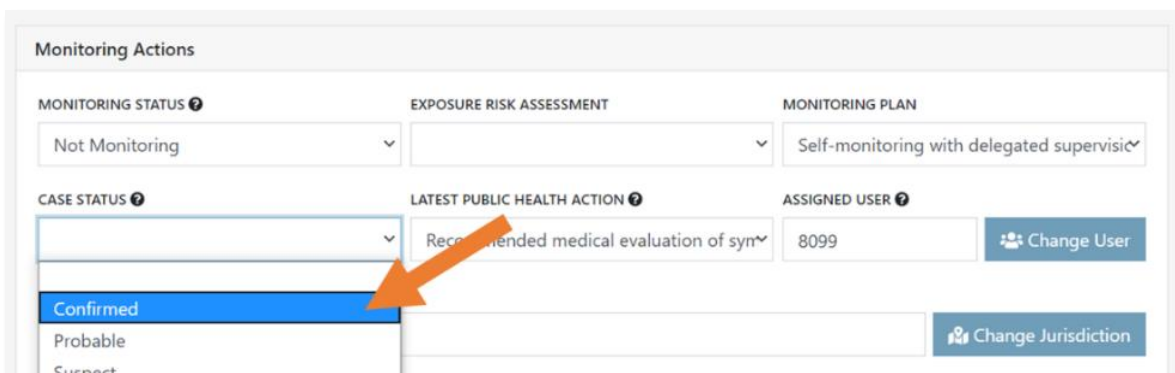


Figure 143: Select case status

### 9.4.10.1 Case Status is Confirmed or Probable

- Select “Confirmed” or “Probable”.

- Select if you would like to continue monitoring the case in Sara Alert™ or not. This should be based on local response protocols.
  - Selecting “**End Monitoring**” will move the record to the closed line list with “Meets Case Definition” as the reason
  - Selecting “**Continue Monitoring in Isolation Workflow**” will move the record to the isolation workflow. The record will appear in either the “Non-Reporting” or “Reporting” line lists, depending on the monitoree’s reporting status.

The screenshot shows a web form titled 'Case Status'. Below the title, it says 'Please select what you would like to do:'. There is a dropdown menu with a downward arrow on the right. Below the dropdown, there are two buttons: 'End Monitoring' and 'Continue Monitoring in Isolation Workflow'. An orange arrow points from the top right towards the dropdown menu.

**Figure 144: Choose what to do with the record**

#### 9.4.10.2 Case Status is Suspect, Not a Case, or Unknown

- Select “**Suspect**”, “**Not a Case**”, or “**Unknown**”
- The record will be retained or returned to the exposure monitoring workflow to continue monitoring for the remainder of the monitoring period or until meets confirmed or probable case status.

The screenshot shows the 'Case Status' form with the dropdown menu set to 'Continue Monitoring in Isolation Workflow'. Below the dropdown, there is a text box that reads: 'The case status for the selected record will be updated to Confirmed and moved to the appropriate line list in the Isolation Workflow.' At the bottom right, there are two buttons: 'Cancel' and 'Submit'.

**Figure 145: The case will move back to an active monitoring list in the exposure workflow**

#### 9.4.11 Manually Close Records for Monitorees Who No Longer Require Follow-Up

If a monitoree should no longer be monitored by public health (e.g., due to the ending of the monitoring period, lost to-of follow-up, recovery, deceased, etc), a user can close the record. This will move the record off of the Active Monitoring line lists in the respective workflow (exposure or isolation) and onto the Closed line list; the system will also stop sending daily symptom reports unless the monitoree is a designated Head of Household and has reporting household members that are still eligible to receive daily reports (see **page 107**).



All records in the Isolation Workflow must be manually closed after public health has determined that the individual can stop being monitored by Sara Alert™. In the Exposure Workflow, records that meet specific criteria are automatically closed by the system; see **page 29** for more information.

1) After selecting the record of interest, update “**Monitoring Status**” to “**Not Monitoring**” to close the record.

The screenshot shows a web form titled "Monitoring Actions". The "MONITORING STATUS" dropdown menu is open, showing three options: "Actively Monitoring", "Actively Monitoring", and "Not Monitoring". The "Not Monitoring" option is highlighted in blue. An orange arrow points to the dropdown menu. Other fields visible include "EXPOSURE RISK ASSESSMENT", "MONITORING PLAN", "LATEST PUBLIC HEALTH ACTION", and "ASSIGNED USER".

**Figure 146: Change monitoring status**

2) Select the appropriate options:

- **If the monitoree is in a household**, the user will be prompted to select the records that the change should be applied to (e.g., the current record only or all household members).
  - Select “This monitoree and all household members” ONLY if all monitorees in the reporting household should no longer be monitored in Sara Alert™.
- Document the reason for changing the monitoring status and any additional details. See **page 29** for a description of available reasons for closure.
- **If the monitoree is in a household and is being monitored in the Isolation workflow:** A user may select to update the Last Date of Monitoring for all reporting household members who have Continuous Exposure turned on and are being monitored in the Exposure Workflow.
  - A user should select “Yes” if the case whose record is being closed was the source of continuous exposure to other reporting household members. If a user selects this option, the system will update the Last Date of Exposure and turn off continuous exposure for the appropriate records since the reporting household contacts are no longer being exposed to this case. The date field will be populated with the current date but can be modified to reflect the earliest date when the case was no longer considered infectious.
  - If some reporting household members still have ongoing exposure to another case, this option should not be selected. Records will need to be individually updated. See **page 91** for more details on managing exposures in reporting households.
  - Other monitorees in Sara Alert™ who were being continuously exposed to this case but are not part the case’s reporting household will also need to be updated individually with the known last date of exposure.

**Monitoring Status**

Are you sure you want to change monitoring status to "Not Monitoring"? **This will move the selected record(s) to the Closed line list and turn Continuous Exposure OFF.**

Please select the records that you would like to apply this change to:

- This monitoree only
- This monitoree and all household members

Please select reason for status change:

--

Please include any additional details:

Would you like to update the *Last Date of Exposure* for all household members who have Continuous Exposure toggled ON and are being monitored in the Exposure Workflow?

- No, household members still have continuous exposure to another case
- Yes, household members are no longer being exposed to a case

Cancel Submit

**Figure 147: Document reason for monitoring status change**

3) The change is documented in the record’s history.

**History**

state1\_epi@example.com, less than a minute ago (2020-03-26 17:53:13 UTC) **Monitoring Change**

User changed monitoring status to "Not Monitoring". Reason: Lost to follow-up during monitoring period

**Figure 148: Comments are added to record history**

4) The monitoree will then move to the “Closed” line list. A record can be moved back to the Active Monitoring line lists by changing the monitoring status back to “Actively Monitoring”.

Symptomatic 38 Non-Reporting 437 Asymptomatic 12 PUI 10 **Closed 83** Transferred In 0 Transferred Out 0 All Monitorees 580

Monitorees not currently being monitored. You are currently in the exposure workflow. **Clear All Filters**

Jurisdiction USA All Exact Assigned User All None

Search Advanced Filter Bulk Actions

Monitoree	Jurisdiction	Assigned User	State/Local ID	Date of Birth	Eligible For Purge After	Reason for Closure	Closed At
Grouch, Oscar	County 1	2503		06/15/1975	10/21/2020 09:10 EDT	Completed Monitoring	10/07/2020 09:10

**Figure 149: The monitoree now appears in the “Closed” line list**

## 9.4.12 Reporting Household Functions

### 9.4.12.1 How to Update Monitoring Actions for All Monitorees in the Same Reporting Household

When modifying a Head of Household’s record, changes made to the following monitoring action data elements can be applied to the entire household that the monitoree is responsible for:

- Monitoring Status
- Exposure Risk Assessment
- Monitoring Plan
- Latest Public Health Action
- Assigned Jurisdiction

- 1) Select the Head of Household record from the appropriate line list.
- 2) Update the Monitoring Action data elements as needed
- 3) Select “**This monitoree and all household members.**”

**Exposure Risk Assessment**

Are you sure you want to change exposure risk assessment to "Low"?

Please select the records that you would like to apply this change to:

This monitoree only

This monitoree and all household members

Please include any additional details:

Cancel Submit

**Figure 150: You may apply HoH record changes to all household members**

### 9.4.12.2 How to Update Exposure Date for Individuals or Reporting Household Members

When modifying **any record** that is part of a reporting household, changes made to the following data elements in the **Reports** section *can* be applied to other records in the monitoree’s entire household as well.

- Last Date of Exposure
- Continuous Exposure (button)

Updating these data elements allows the user to extend or shorten the monitoring period for an individual or reporting household members, as necessary. See **page 91** for more information on how to manage reporting household members with continuous exposure to a case.

#### **Additional details:**

- These changes only apply to active records in the exposure workflow (e.g., contacts who are being actively monitored)
- When selected, the line lists will show “Continuous Exposure” in the End of Monitoring Column

- If the Last Date of Exposure is updated, the continuous exposure status is automatically turned off

#### 9.4.12.3 Managing Reporting Households with Continuous Exposure to a Case

Sara Alert™ gives users and monitorees the option to organize monitorees into reporting groups (called “Households” in Sara Alert™). For each reporting household a specific monitoree, called the Head of Household, reports for all active monitorees in the group. Only the Head of Household’s contact information and preferred reporting method is used to determine where the daily symptom report requests are sent.

**This section covers scenarios specific to managing continuous exposure in reporting households** in Sara Alert™. Please see other sections of the user guide for more information on additional household capabilities:

- Create households (**page 38**)
- Change a Head of Household (**page 41**)
- Add monitorees to a household (**page 42**)
- Move existing record into a household (**page 43**)
- Remove household members (**page 44**)

**For each of the scenarios below:**

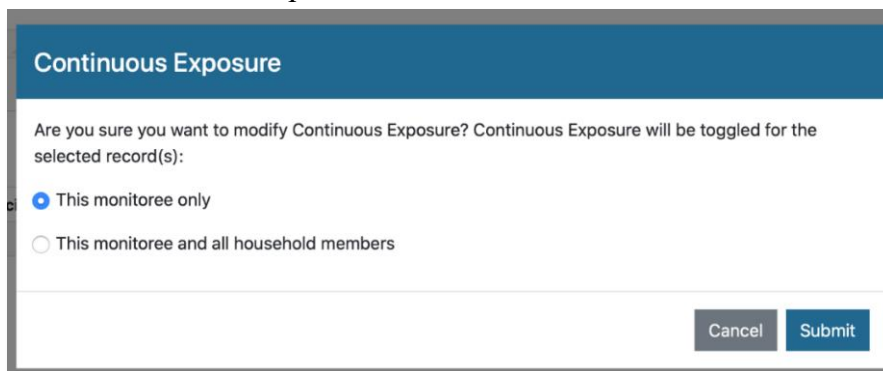
- The Head of Household will continue to report on behalf of household members whose monitoring status is “Actively Monitoring”, even if the Head of Household themselves is no longer being monitored in Sara Alert™.
- If at any point the Head of Household does not wish to report on behalf of the household, the user should choose a new Head of Household (and update the contact information for that monitoree accordingly—see **page 41**).
- If not all enrolled reporting household contacts are being continuously exposed to a case, a user may apply the continuous exposure status to individual records only (not the entire reporting household).
  - Select “**continuous exposure**” then click “**Submit**”.
  - Do NOT select the option to update household members. Select “**This monitoree only**”

##### 9.4.12.3.1 Reporting Households with Monitorees only in the Exposure Workflow

For reporting households with monitoree records only in the exposure workflow (e.g., contacts only), the Head of Household reports on behalf of all active household members until all of the household members are closed in Sara Alert™ (Monitoring Status equal to “Not monitoring”).

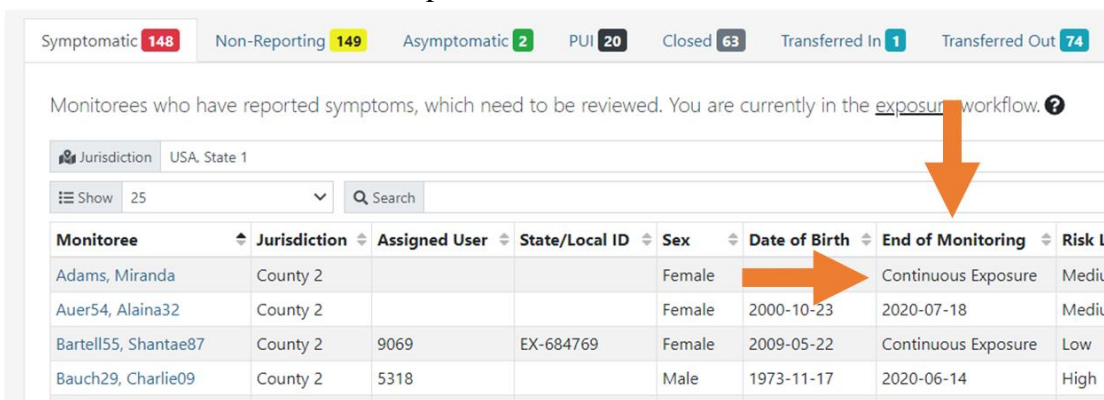
**9.4.12.3.2 If all enrolled household contacts are being continuously exposed to a case not enrolled in Sara Alert™:**

1) The user should select “**Continuous Exposure**” on one of the household records in the exposure workflow and choose to update “**This monitoree and all household members**”.



**Figure 151: Enable “Continuous Exposure” for all reporting household monitorees**

2) The system will automatically extend the monitoring period (e.g., continue to send messages) for active records in the exposure workflow that are part of the selected reporting household until a Last Date of Exposure is specified. The dashboard will show “Continuous Exposure” on the dashboard for all records where this option has been selected.



**Figure 152: You can see if a record is under continuous exposure on the Exposure line list**

This status is also visible by viewing the HoH record. The HoH’s details view displays a table showing the workflow, monitoring status, and continuous exposure status for all monitoree’s in the household.



**Figure 153: You can see if a record in a reporting household is under continuous exposure under the HoH's Monitoree Details**

3) Once exposure to a case ends (e.g., the case is no longer infectious), open the record of a reporting household member in the Exposure Workflow. Since the ongoing exposure has ended for the household member, update the **Last Date of Exposure**. A user may select whether to update the last date of exposure for either:

- This monitoree only
- This monitoree and only household members where Continuous Exposure is turned ON,
- This monitoree and all household members (regardless of Continuous Exposure status)

Select the option to update the appropriate household member records. “**Continuous Exposure**” will be toggled off for records after updating the last date of exposure.

**Figure 154: Choose for which records to update last date of exposure**

#### 9.4.12.4 Reporting Households with Monitorees in both the Isolation and Exposure Workflows

For reporting household with monitoree records in both workflows, users can indicate if household members in the exposure workflow are being continuously exposed to the case in the household. The Head of Household will still report on behalf of all reporting household members, regardless of the HoH workflow, case status, or whether they are currently being monitored.

##### 9.4.12.4.1 If all enrolled household contacts are being continuously exposed to a case enrolled in Sara Alert™:

Follow steps 1 and 2 above to indicate that contacts are being continuously exposed to a case. This lets the system know that there is a dependency between the case in the isolation workflow and the monitoring period of the contacts in the exposure workflow.

3) When a reporting household case is closed in the isolation workflow for any reason (e.g., recovered, deceased, etc.) the system will prompt the user to update the last date of exposure for any remaining reporting household members in the exposure workflow (i.e., contacts) who have “continuous exposure” indicated. Updating the last date of exposure will automatically turn off continuous exposure for the contacts and the monitoring period will be calculated as 14 days after specified last date of exposure.

The “**Last Date of Exposure**” field will pre-populate with the date of closure. This value can be modified by the user.

**NOTE:** This option is **not** available when a record’s status is changed to “Closed” using the bulk update feature (i.e., directly from a line list as described on **page 68**)

**Figure 155:** When closing the case out of the isolation workflow, update the last date of exposure for household members in the exposure workflow

## 10 PUBLIC HEALTH ENROLLER ROLE CAPABILITIES

Public Health Enrollers have the combined capabilities of both Enrollers and Public Health Users. In the Exposure Workflow, Public Health Enrollers have the unique capability to enroll monitorees directly from the list of unenrolled close contacts associated with a specific record.

**NOTE:** See **page 84** for more details on how to add a new close contact to a monitoree record.

### 10.1 Enroll a Monitoree Into Either Workflow From Dashboard

1) From the Monitoring dashboard and click “Enroll New Monitoree” or “Enroll New Case”.

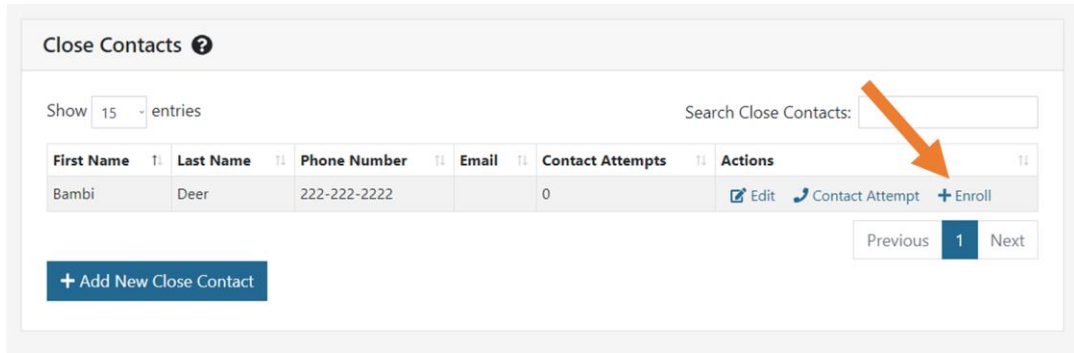
**Figure 156:** Enroll a new monitoree into the isolation workflow

2) Enter monitoree information in the Enrollment Wizard (see **page 34** for more information).

3) The final page of the Enrollment Wizard differs depending on the workflow selected the first screen. Enter the required fields. All fields can be edited after the record is created.

## 10.2 Complete enrollment of close contacts as new monitorees in the system

1) Open the monitoree’s record and scroll to the “Close Contacts” section. Under “**Actions**” click “**Enroll**” for the individual you would like to complete enrollment as a monitoree in Sara Alert™.



**Figure 157: Click “Enroll” to add a specific contact as a new monitoree**

2) This will automatically open the enrollment wizard so you can enroll the contact as a new monitoree.

The following fields will pre-populate with data available in the close contact record:

- First Name
- Last Name
- Phone Number
- Email
- Notes (populated on the final page of the Enrollment Wizard)
- Close Contact of Known Case (populated with the initial monitoree’s Sara Alert™ ID)

Return to Exposure Dashboard / Register New Monitoree Your Jurisdiction: USA, State 1

**Monitoree Identification**

FIRST NAME \*  MIDDLE NAME(S)  LAST NAME \*

DATE OF BIRTH \*   AGE  SEX AT BIRTH

GENDER IDENTITY  SEXUAL ORIENTATION

RACE (SELECT ALL THAT APPLY)  WHITE  BLACK OR AFRICAN AMERICAN  AMERICAN INDIAN OR ALASKA NATIVE  ASIAN  NATIVE HAWAIIAN OR OTHER PACIFIC ISLANDER

ETHNICITY

**Figure 158: The enrollment wizard will pre-populate with information from the close contacts list**

3) Complete enrollment to begin monitoring in Sara Alert™. See **page 34** for more information on enrollment.

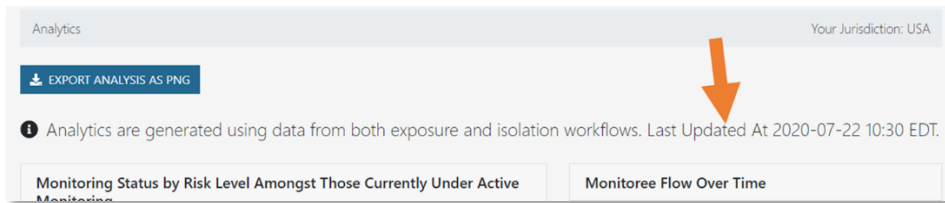


# 11 ANALYST ROLE CAPABILITIES

## 11.1 View and Export the Analytics Summary

A user assigned the analyst role will be **taken directly to the Analytics Summary** upon login as shown below. The analytics summary shows aggregated data from both the exposure and isolation workflows. Public health users can view aggregated monitoring and epidemiological data for their assigned jurisdiction (e.g., local, state, nationwide) and can view summary maps showing Sara Alert™ usage.

1) Review the analytics summary and configure the display of information based on preference (e.g., data from displayed as table or charts) The data that drives the analytics page is updated once a day for performance reasons. The time of the last update can be found at the top of the analytics summary.



**Figure 159: Analytics summary and time of the last update can be found at the top of the screen**

2) Some tables can be exported as a CSV file. Click the corresponding export button to download the file.

Country of Exposure	Export Complete Country Data					
	High	Medium	Low	No Identified Risk	Missing	Total
Ecuador	1	0	3	4	0	8
Greece	1	0	5	0	2	8

**Figure 160: Some analytics datasets can be exported as a CSV file**

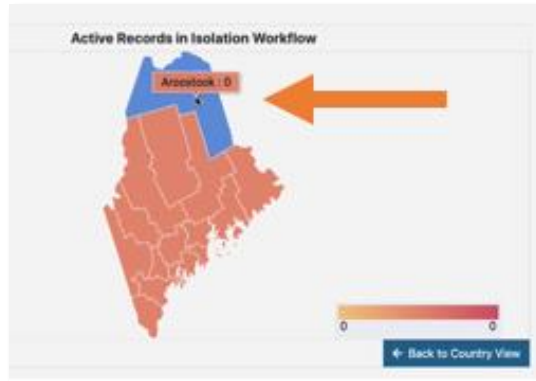
3) A user can view the maps summarizing the total number of all active monitorees in Sara Alert™ by workflow according to the specified home address state. Users can see the number of monitorees in each jurisdiction by placing their cursor over the location they wish to view.



**Tip:** These maps only show Sara Alert™ usage. Totals may not match public reports of the number of cases since all jurisdictions do not use the isolation workflow.

**Figure 161: View the number of active monitorees per state by placing your cursor over it**

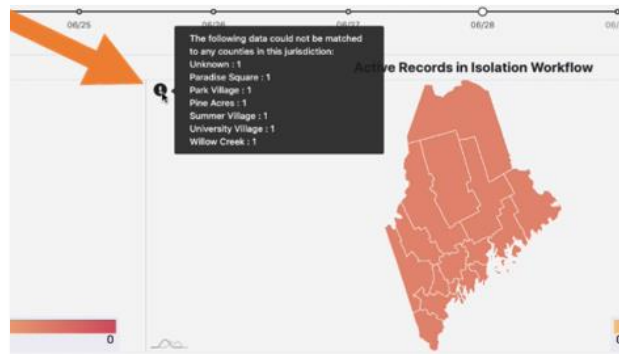
4) Users can view a map summarizing the total number of active monitorees by workflow *within their assigned jurisdiction* according to the monitoree’s home county by clicking on maps to zoom. This will zoom the map in to show counties when available. Users can see the number of active monitorees per county by hovering their cursor over the location they wish to view. A user cannot view county-level data for all records; only records the user has access to.



**Tip:** County is not a required field so the local view will not be populated if the user’s jurisdiction does not use this field.

**Figure 162: View county-level data for records in your assigned state or territory by clicking on it and placing your cursor over the counties you would like to view**

5) Users can view monitorees that cannot be mapped to counties within a state due to missing values, spelling errors, entry does not match expected value (e.g., “Montgomery” is a valid entry; “Montgomery County” is not) by scrolling over the exclamation point icon in the upper left corner of each map. This button will not appear if all records were able to be mapped to a county



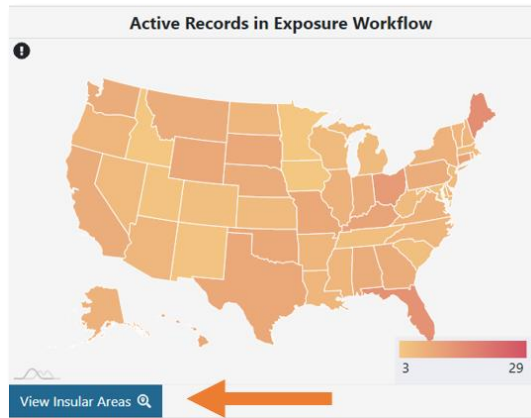
**Figure 163: Scroll over the exclamation point icons to view monitorees who could not be matched to counties within a jurisdiction**

6) Users can view historic map data by clicking on the circles above the desired date.



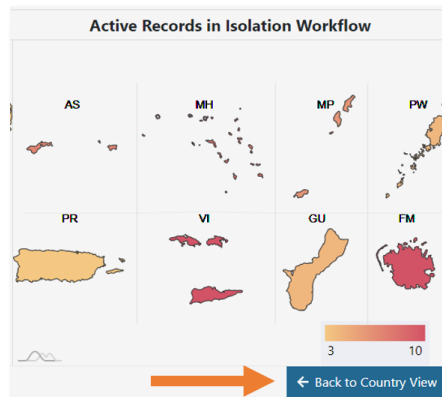
**Figure 164: Click the circles to visualize data from that date**

7) To view areas outside of the 50 states and federal district, click the “**View Insular Areas**” button in the bottom left corner of the maps. County-level data is not available for these areas.



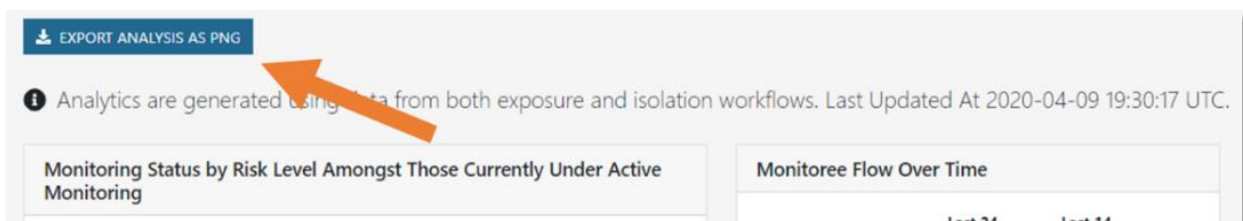
**Figure 165: Click "View Insular Areas"**

8) Click the “**Back to Country View**” button to return to the state map.



**Figure 166: Click "Back to Country View"**

9) Select “**Export Analysis as PNG**” to download a screen capture of the entire dashboard display. The export will reflect the current dashboard view configuration (e.g., data displayed in table, graph or map format).



**Figure 167: Export the summary**

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**Tip:** This functionality is not available using Internet Explorer 11.

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## 12 ADMINISTRATOR ROLE CAPABILITES

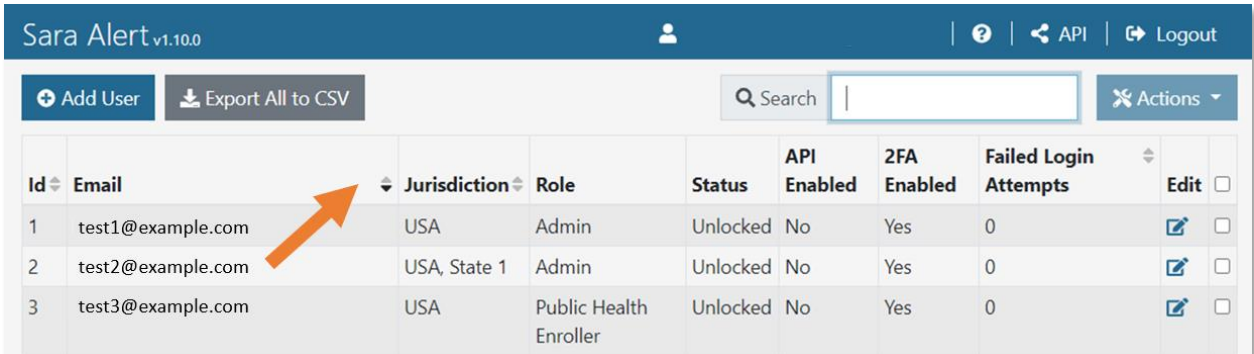
Administrators are responsible for managing Sara Alert™ Users. Local administrators can only manage users within their assigned jurisdiction. If a local administrator needs assistance with managing their users, please contact the Sara Alert™ Help Desk.




### 12.1 View List of Users

The Administrator role shows the list of current users in their assigned jurisdiction with the following associated information:

- **ID:** Shows the unique system ID associated with the user. Jurisdictions may use this number for the assigned user field, but there is no automatic linkage between this ID and the “Assigned User” field in a monitoree’s record.
- **Jurisdiction:** Shows the complete access hierarchy for the user. Users (including Administrators) have access to all data (specific to their role) for their jurisdiction and all sub-jurisdictions.
- **Email:** User’s email address
- **Role:** User’s role. Defines which capabilities a user should have.
- **Status:** Whether the user’s account is locked or unlocked.
- **API Enabled:** Whether the user has access to the API
- **2FA Enabled:** Whether the user’s account has configured their required 2-factor authentication
- **Failed Login Attempts:** The number of consecutive failed login attempts since the last successful login. The system will automatically lock a user’s account after 5 failed login attempts.

Click on headers to sort based on that column.



Id	Email	Jurisdiction	Role	Status	API Enabled	2FA Enabled	Failed Login Attempts	Edit
1	test1@example.com	USA	Admin	Unlocked	No	Yes	0	 <input type="checkbox"/>
2	test2@example.com	USA, State 1	Admin	Unlocked	No	Yes	0	 <input type="checkbox"/>
3	test3@example.com	USA	Public Health Enroller	Unlocked	No	Yes	0	 <input type="checkbox"/>

**Figure 168: Click the column header to sort that column**

## 12.2 How to Add a New User

- 1) Click the “Add User” button.

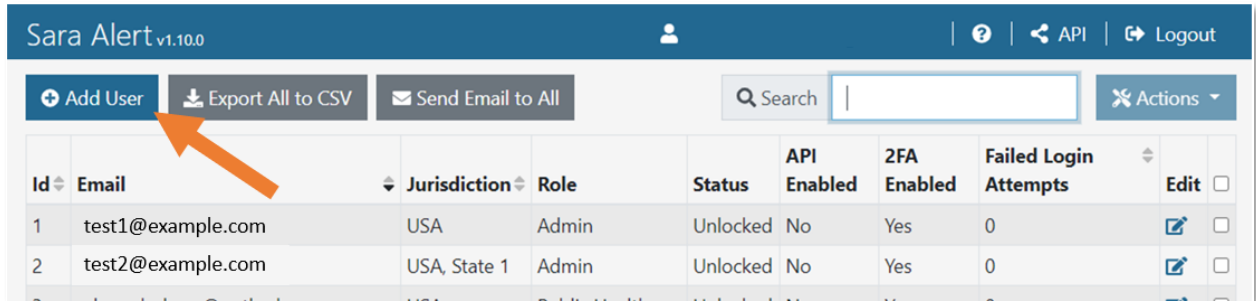


Figure 169: Add a new user

- 2) Enter the new user’s email address, select their jurisdiction and role from the drop-down lists, and toggle their API access. Click “Add User” to complete the process.

**Add User**

Email Address

Jurisdiction

Role

API Access  
 Disabled

Figure 170: Complete new user entry

## 12.3 How to Export the User List

To export a list of users for your jurisdiction, click the “Export to CSV” button.

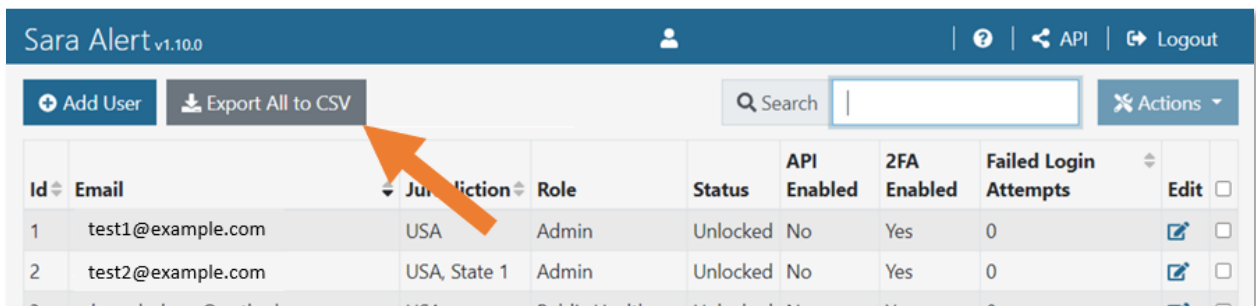
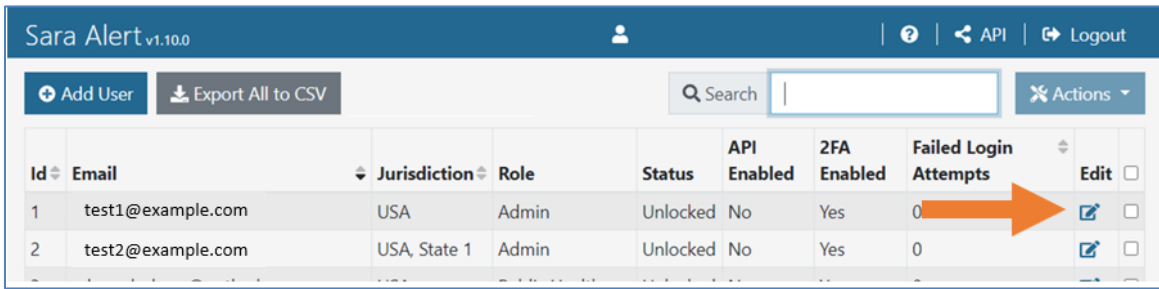


Figure 171: Export a list of users

## 12.4 How to Edit User Account Information

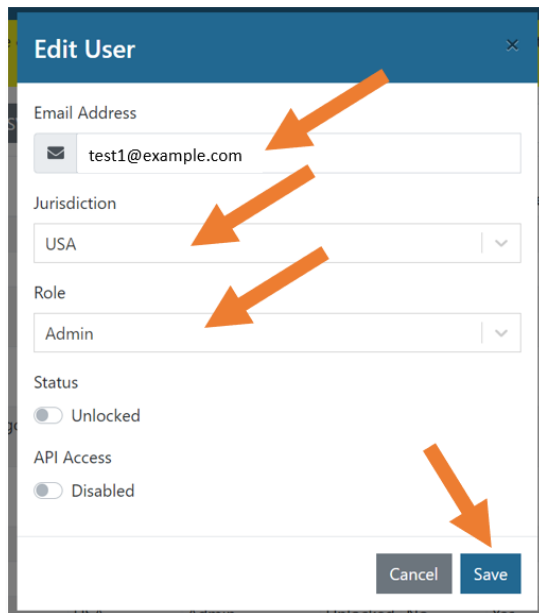
User information can be edited one record at a time on the administration panel.

- 1) To edit a user's information, first click the **"Edit"** icon for that user.



**Figure 172: Click the "Edit" icon**

- 2) This will open the "Edit User" window. You can edit the user's Email Address, Jurisdiction, Role, Locked Status, and API access. Click **"Save"** to confirm your changes.

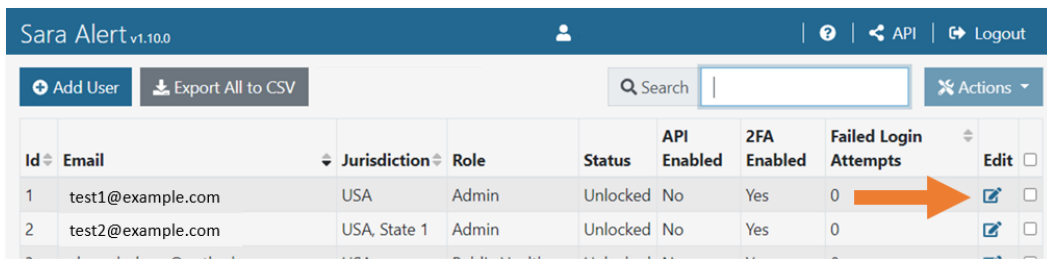


**Figure 173: Edit the appropriate fields and click "Save"**

## 12.5 How to Lock or Unlock User Accounts

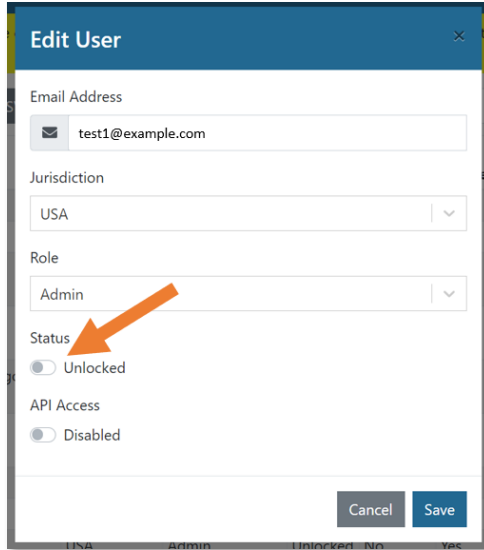
Sara Alert™ will automatically lock a user's account after 5 unsuccessful login attempts.

- 1) To manually lock or unlock a user's account, first click the **"Edit"** icon for that user



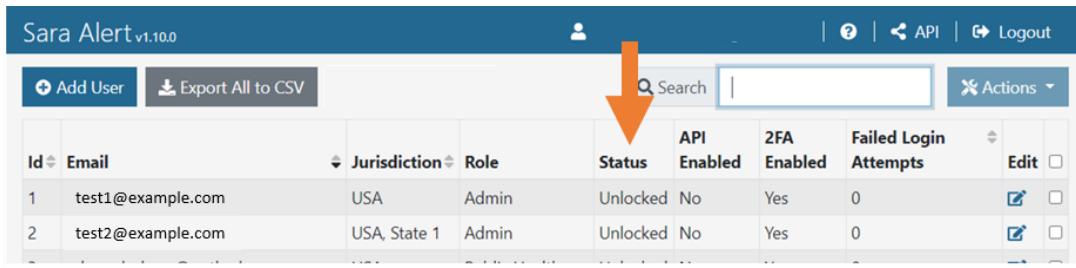
**Figure 174: Click the "Edit" icon**

2) Toggle the “Status” switch to lock or unlock the user’s account. Click “Save” to confirm.



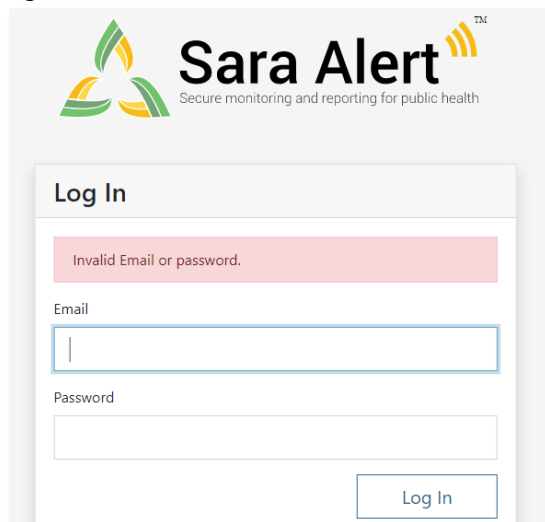
**Figure 175: Toggle the “Status” switch to lock or unlock the account**

3) You can see an account’s status on the user dashboard in the “Status” column.



**Figure 176: The “Status” column shows if a user’s account is locked or unlocked**

4) Users will be unable to log in to a locked account.



**Figure 177: Users cannot log in to a locked account**

## 12.6 How to Reset User Passwords

User passwords can be reset multiple accounts at a time. If you click the select box in the menu header, you can reset passwords for all accounts visible on that page (not all accounts in the system).

1) Sara Alert™ handles password reset requests via email. If one or more of your users requests a password reset, first select the user(s) by clicking the box in the far right column.

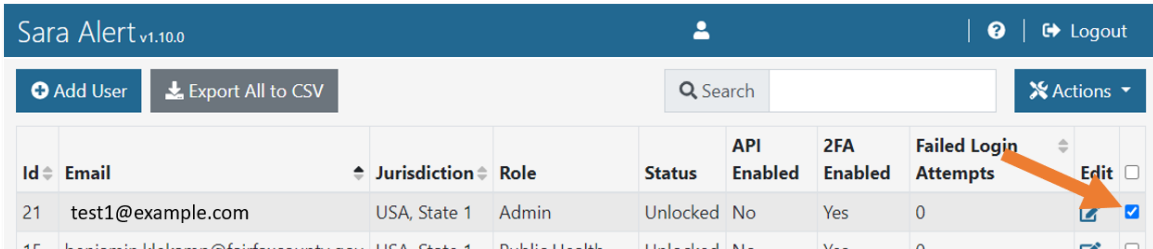


Figure 178: Select the user by clicking the box in the far-right column

2) Clicking the checkbox in the column header will select all rows in the current view on the page (not all rows in the full table).

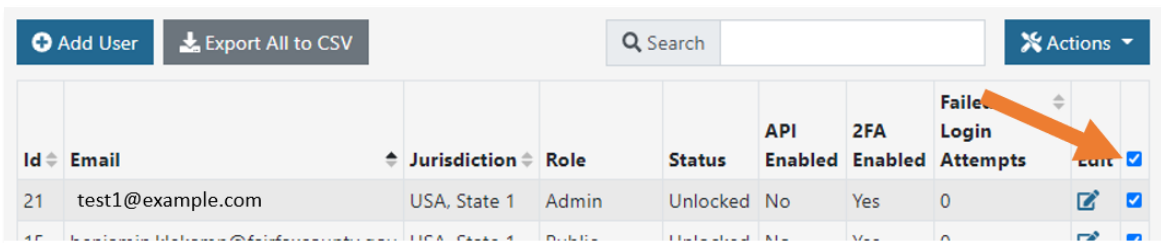


Figure 179: Select all users in the view by clicking the checkbox in the column header

3) Click the “Actions” button and from the drop-down menu, click “Reset Password.”

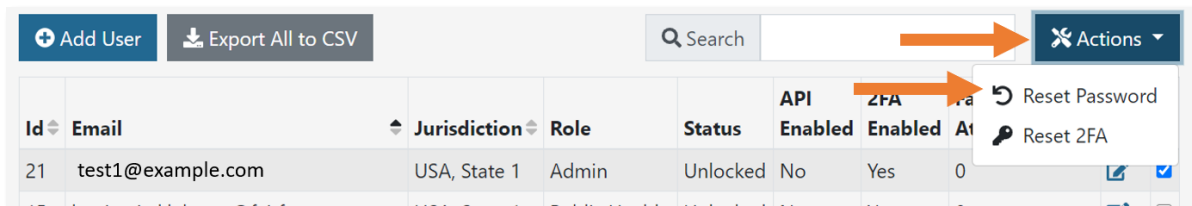


Figure 180: Select “Reset Password” from the “Actions” drop-down menu

4) The user will receive an email with a temporary password. On their next login, they will be prompted to change their password.

**NOTE:** Temporary passwords expire after 72 hours (and will need to be reissued via another password reset)

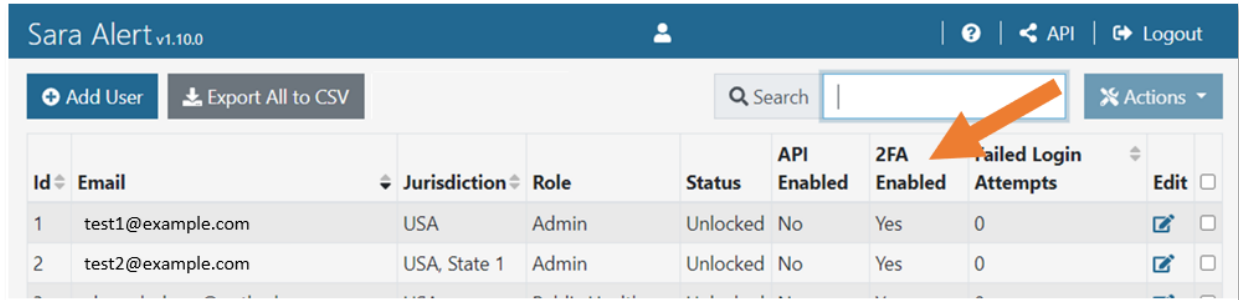


## 12.7 How to Manage Two-factor Authentication (2FA)

2FA is a requirement for all Sara Alert™ users (not including monitorees) to help maintain the tool’s security. If you click the select box in the menu header, you can reset 2FA for all accounts visible on that page (not all accounts in the system).

## 12.8 View Status of 2FA Configuration

The “**2FA Enabled**” column shows whether a user has configured their required 2FA. If a user has not configured 2FA, they will be prompted to do so on their next login.



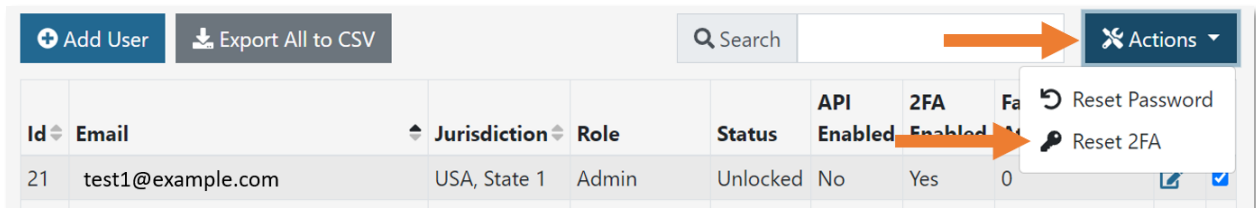
Id	Email	Jurisdiction	Role	Status	API Enabled	2FA Enabled	Failed Login Attempts	Edit
1	test1@example.com	USA	Admin	Unlocked	No	Yes	0	<input type="checkbox"/>
2	test2@example.com	USA, State 1	Admin	Unlocked	No	Yes	0	<input type="checkbox"/>

**Figure 181: The Administrator Dashboard shows a user’s 2FA configuration status**

## 12.9 Resetting Two-Factor Device Pairing

If a user wishes to reset the phone number associated with their Sara Alert™ account (i.e., change the phone that will receive the 7-digit 2FA token), they should notify their jurisdiction’s Local Administrator.

- 1) Select one or more user accounts by clicking the checkbox in the rightmost column.
- 2) Click “**Actions**” and select “**Reset 2FA**” from the drop-down menu
  - Once reset, the user’s “Configured 2-Factor Auth” status will change to “No” and the user will be prompted to register for 2FA on their next login attempt



Id	Email	Jurisdiction	Role	Status	API Enabled	2FA Enabled	Failed Login Attempts	Edit
21	test1@example.com	USA, State 1	Admin	Unlocked	No	Yes	0	<input checked="" type="checkbox"/>

Reset Password

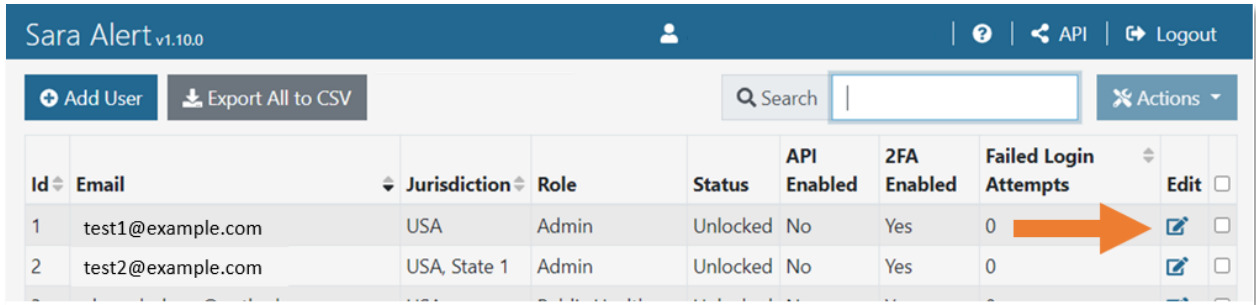
Reset 2FA



**Figure 182: Reset a user’s 2FA pairing**

## 12.10 Enabling API Access

Administrator users can provide API access to specific users in their jurisdiction if they have been approved to do so by the system administrators. For more information on how to gain access to the API, see **SMART on FHIR API** on page 6.

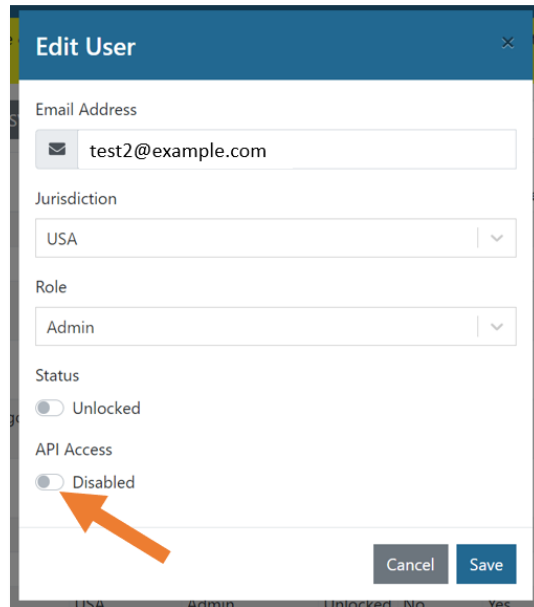
1) To enable API access, first click the “**Edit**” icon for that user



Id	Email	Jurisdiction	Role	Status	API Enabled	2FA Enabled	Failed Login Attempts	Edit
1	test1@example.com	USA	Admin	Unlocked	No	Yes	0	
2	test2@example.com	USA, State 1	Admin	Unlocked	No	Yes	0	

**Figure 183: Click the “Edit” icon**

2) In the Edit User window, toggle the **API Access** switch to enable or disable access.



**Edit User**

Email Address  
test2@example.com

Jurisdiction  
USA

Role  
Admin

Status  
 Unlocked

API Access  
 Disabled

Cancel Save

**Figure 184: Toggle “API Access” to enable or disable access**

# 13 MONITOREE SELF-REPORTING OVERVIEW

Monitorees are individuals who have been enrolled by a trusted enroller or public health 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).

## 13.1 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 6. Summary of Messages Sent to Eligible Monitorees By Reporting Method**

	E-mailed Web Link	SMS-Texted Weblink	SMS Text message	Telephone Call
<b>Welcome message<sup>1</sup></b>	Sent immediately following enrollment; includes weblink for daily report.	Sent immediately following enrollment; includes weblink for daily report.	Sent immediately following enrollment; does not ask for daily report.	No welcome message sent
<b>Reminder Message Sent until response is logged?</b>	No, one daily request sent	No, one daily request sent <sup>2</sup>	No, one daily request sent <sup>2</sup>	Yes, up to once/hour during preferred contact time
<b>Can set preferred contact time?</b>	Yes	Yes	Yes	Yes
<b>Daily Report Message Timing</b>	During Preferred Contact Time	During Preferred Contact Time	During Preferred Contact Time	During Preferred Contact Time
<b>Daily Report Format</b>	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
<b>Daily Message Format (Single Monitoree)</b>	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

<sup>1</sup> If the Preferred Reporting Method is initially set to “Unknown” or “Opt-Out” and later updated, the monitoree **will not** receive a welcome message from the system.

<sup>2</sup> The system will make multiple attempts to reach the monitoree if the messages are not successfully delivered by the carrier, but the monitoree will only see one text from the system per day.

	E-mailed Web Link	SMS-Texted Weblink	SMS Text message	Telephone Call
<b>Daily Message Format (Reporting Household)</b>	Single email with weblinks for each active household member (denoted by initials and age)	Two texts for each active household member (one identifies the household member by initials and age; the second includes the 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
<b>What does a symptomatic report look like? (Single Monitoree)</b>	Specific symptoms shown. See <b>page 23</b> for more details	Specific symptoms shown. See <b>page 23</b> for more details	Report highlighted in red, but specific symptoms unavailable. See <b>page 23</b> for more details	Report highlighted in red, but specific symptoms unavailable. See <b>page 23</b> for more details
<b>What does a symptomatic report look like? (Reporting Household)</b>	Specific symptoms shown for each monitoree in household. See <b>page 23</b> for more details	Specific symptoms shown for each monitoree in household. See <b>page 23</b> for more details	Report highlighted for all household members. Specific symptoms and specific household member that has symptoms unavailable. See <b>page 23</b> for more details	Report highlighted for all household members. Specific symptoms and specific household member that has symptoms unavailable. See <b>page 23</b> for more details
<b>When is the “Monitoring Complete” messages sent?</b>	Sent if a monitoree is on the Asymptomatic line list (in the Exposure workflow) when the monitoring period ends	No “Monitoring Complete” message for these monitorees	No “Monitoring Complete” message for these monitorees	No “Monitoring Complete” message for these monitorees

## 13.2 Summary of Messages Sent to Monitorees

### 13.2.1 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.

### 13.2.2 Daily Symptom Report Notification Eligibility

Every day, the system **will send a notification** via the monitoree’s preferred reporting method during their monitoring period if eligible.

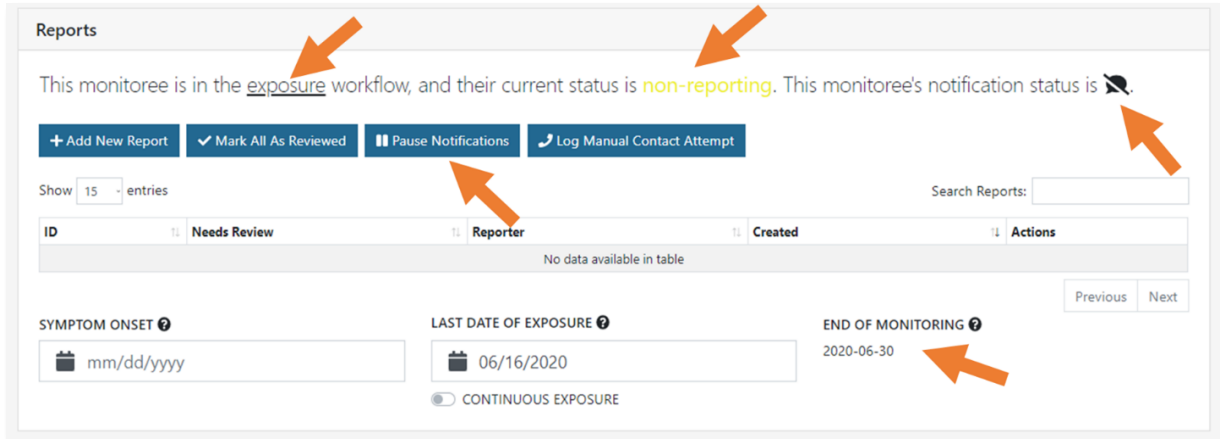
**NOTE:** A monitoree who is in a household but is not the Head of Household will never receive messages from Sara Alert. The Head of Household will receive messages for that monitoree via the Head of Household’s preferred reporting method.

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**TIP:** The system can only send phone-based notifications to phone numbers from the U.S., Canada, and Mexico.

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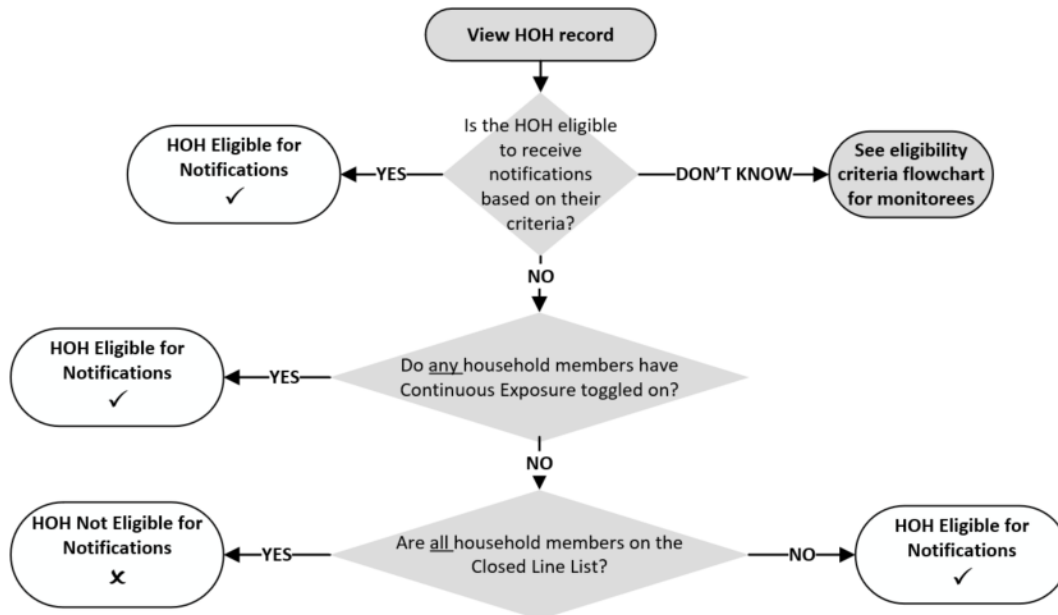
To determine if a monitoree is eligible to receive daily notifications, view the notification icon on the dashboard (see **page 60**) or open the monitoree’s record and scroll to the “Reports” section. This section contains the information needed to assess a monitoree’s notification eligibility.



**Figure 185: Eligibility to receive notifications in monitoree details**

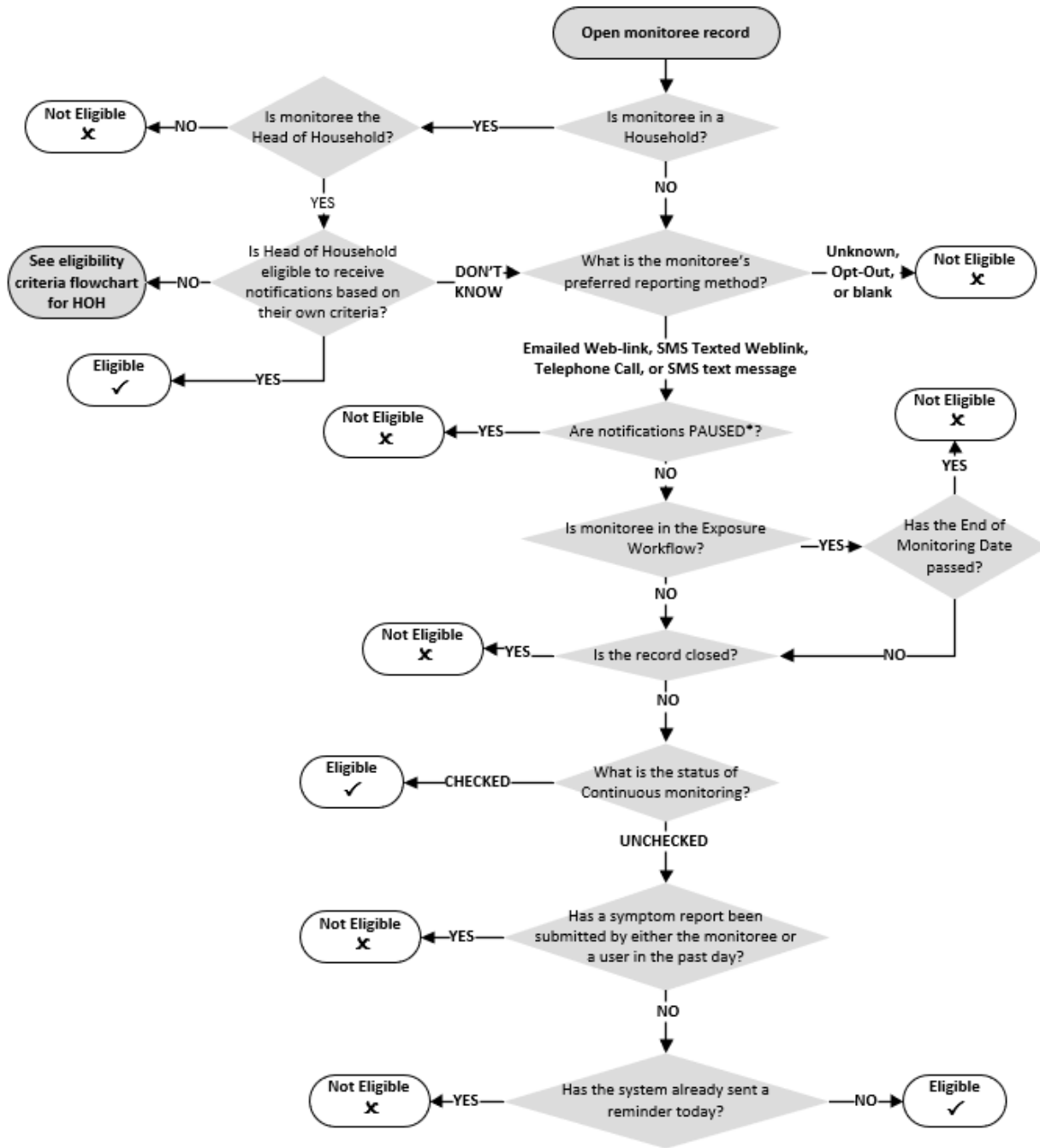
The following flowcharts can be used to identify if the system is expected to send the monitoree a notification on a specific day.

**Guide to Determine Sara Alert™ Daily Notification Eligibility for Monitorees Who Are A Head of Household (v1.14)**



**Figure 186: Guide to Determine Daily Notification Eligibility for Monitorees Who Are A Head of Household**

**Guide to Determine Sara Alert™ Daily Notification Eligibility for Monitorees (v1.14)**



\*A user cannot Pause/Resume notifications or modify Continuous Exposure for records on the Closed line list

**Figure 187. Guide to Determine Daily Notification Eligibility for Monitorees**

### 13.2.3 Welcome Message from Sara Alert™ (Email and SMS only)

It is important to coordinate the timing of system welcome messages with monitorees so that they know the message is legitimate.

- **Emailed Weblink:** Monitorees who select “**E-mailed Web Link**” as the preferred reporting method **at the time of enrollment** will receive an initial welcome notification from the system immediately after enrollment is completed through the user interface or import. The email welcome message provides a link for the monitoree to submit their daily report.
- **SMS Texted Weblink:** Monitorees who select “**SMS Texted Weblink**” as the preferred reporting method **at the time of enrollment** will receive an initial welcome notification from the system immediately after enrollment is completed through the user interface or import. The SMS texted weblink welcome message provides a link for the monitoree to submit their daily report
- **SMS Text-message:** Monitorees who select “**SMS Text-message**” as the preferred reporting method **at the time of enrollment** will receive an initial welcome notification from the system immediately after enrollment is completed through the user interface or import. The SMS welcome message **does not** prompt monitorees for a symptom report
- **Households (Email or SMS Weblink):** If a user enrolls a household in Sara Alert, the welcome message will only include a symptom report weblink for the Head of Household. A subsequent message will be sent at the HoH’s preferred contact time with reports for all enrolled household members.
- **Telephone Call:** Monitorees who selected Telephone Call as the preferred method **will not** receive a specific welcome call.
- **NOTE:** If the preferred reporting method is initially set to “**Unknown**”, “**Opt-Out**”, or “**Telephone Call**” and later updated to **Email** or **SMS Messages** (weblink or text), the monitoree **will not** receive a welcome message from the system.

### 13.2.4 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 (i.e., if “Preferred Contact Time” is blank), the system sends daily text or phone requests during the “Afternoon” contact times until otherwise specified.

- **Email or SMS Messages** (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-Texted Weblink**, 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. See **page 26**.
- **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.

### 13.2.5 Daily Symptom Report Reminder Messages by Preferred Reporting Method (Telephone Call Only)

Daily symptom report reminders are sent to monitorees or heads of households where Telephone Call is selected improve reporting response rate.

- **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 reporting 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 or SMS Messages** (web-link or text): No reminder messages are sent to monitorees who prefer email or SMS if they do not respond to the daily email within a set period of time; monitorees will receive one message from the system approximately every 24 hours.

### 13.2.6 Monitoring Complete Message (Email Only)

A message indicating that a monitoree has completed monitoring is sent if the monitoree is on the asymptomatic line list at the end of the monitoring period. This message is currently only sent to monitorees whose preferred reporting method is email.

### 13.2.7 Invalid Responses (Telephone Call and SMS Text Message)

For monitorees who report via Telephone Call or SMS Text Message there are only two valid responses to their daily report:

- “YES” (or Primary Language equivalent) indicates the presence of any listed symptoms in any household members (if applicable)



- “NO” (or Primary Language equivalent) indicates the absence of all listed symptoms in all household members (if applicable)

For text messages, the responses are **not** case-sensitive. The system will not allow any other responses. Sara Alert™ handles invalid responses differently depending on the contact method:

- **For Telephone Call:** The automated voice will explain that the monitoree’s answer was not understood and prompt them to try again
- **For SMS Text-Messages:** The system will reply with a text that says “I’m sorry, I didn’t quite get that. Please reply with ‘Yes’ or ‘No.’” **The monitoree must then submit a correct response within one hour** for that day’s report to be logged. If a reply is submitted more than one hour after the message is sent, it will not be recorded by the system.

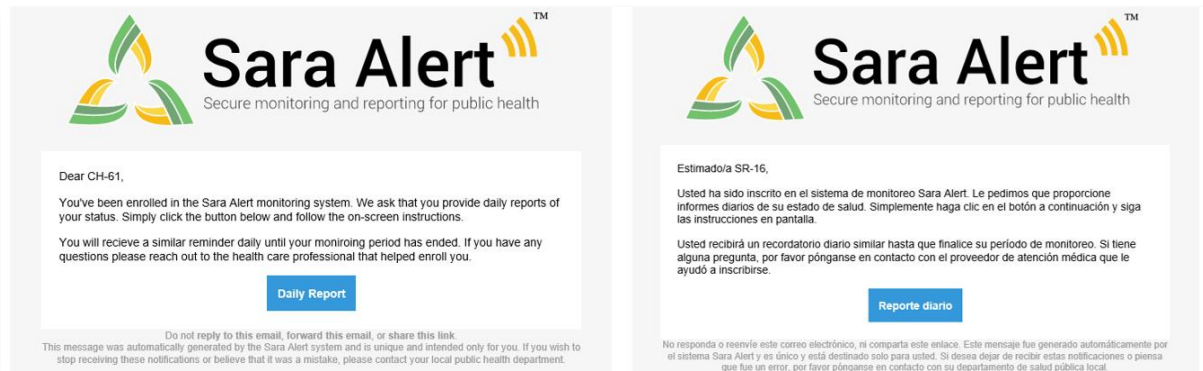
### 13.3 Submitting Daily Reports to Sara Alert™

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.

**NOTE:** Sara Alert™ current supports sending notifications to monitorees in multiple languages (see **page 15**).

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 188: Example Sara Alert™ Welcome Email in English and Spanish**

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

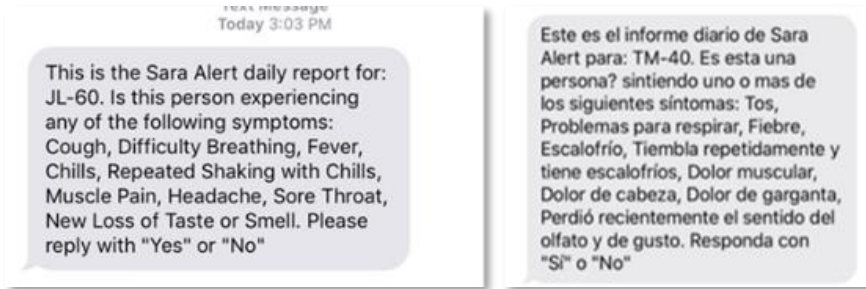


Figure 189: Example SMS text message in English and Spanish from Sara Alert™

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

- **Telephone Call / SMS Text-message:** 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”.
- **SMS Texted Weblink or Emailed Weblink:** 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.

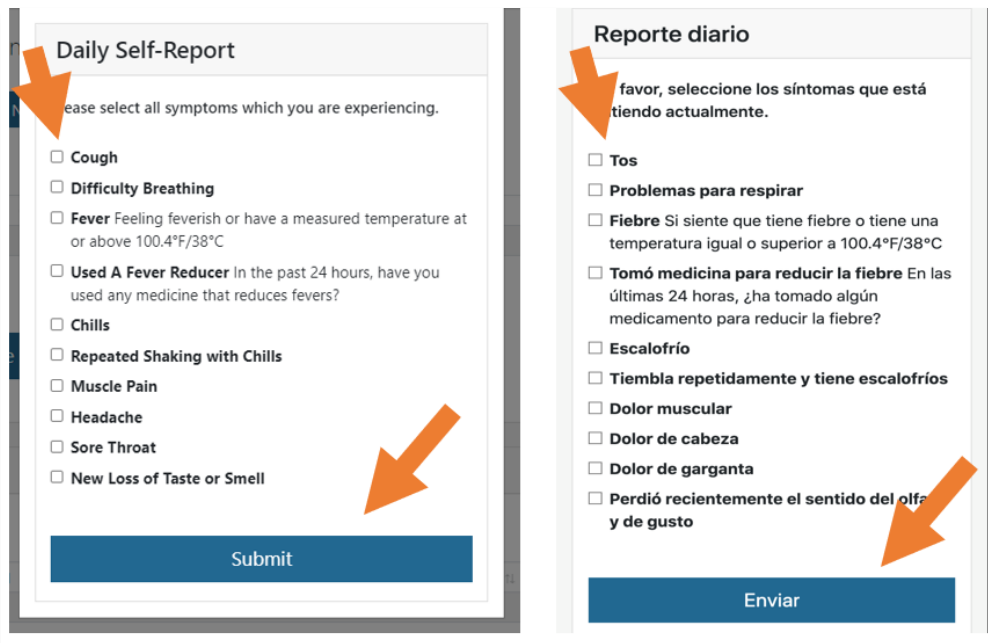


Figure 190: Web-link daily self-report monitoree interface in English and Spanish

3) Sara Alert™ will confirm submission.

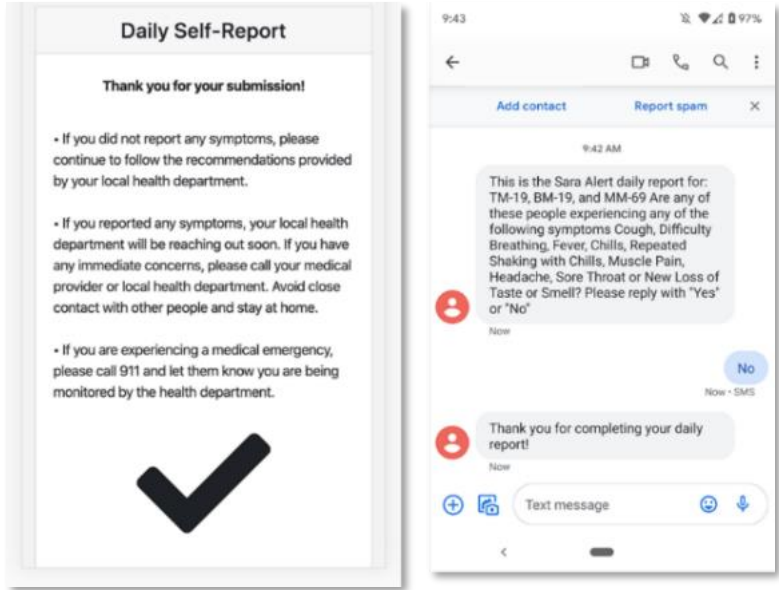


Figure 191: Web-link Daily report confirmation

# 14 APPENDIX A: ADVANCED FILTER FIELDS AND DESCRIPTIONS

Filter Name	Type	Description
Active Monitoring	Boolean (True/False)	Select "True" to show only monitorees who are not on the "Closed" line list (and "False" for the opposite).
Address (outside USA)	Text	Enter any part of a monitoree's address to show only monitorees where that text appears anywhere in their non-US address.
Address (within USA)	Text	Enter any part of a monitoree's address to show only monitorees where that text appears anywhere in their US address.
Common Exposure Cohort Name	Text	Enter any part of a monitoree's common exposure cohort to show only monitorees where that text appears anywhere in the "Member of a common exposure cohort" field.
Continuous Exposure	Boolean (True/False)	Select "True" to show only monitorees who have Continuous Exposure selected (and "False" for the opposite).
Daily Reporters	Boolean (True/False)	Select "True" to show only monitorees who are a Head of Household or not in a household in Sara Alert (and "False" for the opposite).
Email	Text	Enter an email address to show only monitorees with an email address that contains the entered text.
Enrolled	Date Picker	Specify a date range to show only monitorees who were enrolled in that range.
Household Member	Boolean (True/False)	Select "True" to show only monitorees who are in a household but are not a Head of Household in Sara Alert (and "False" for the opposite).
Last Date of Exposure	Date Picker	Specify a date range to show only monitorees with a Last Date of Exposure in that range.
Latest Report	Date Picker	Specify a date range to show only monitorees whose latest report is in that range.
Monitoring Plan	Select	Select a Monitoring Plan to show only monitorees who currently have that Monitoring Plan selected.
Name (First)	Text	Enter a name to show only monitorees with a first name that contains or matches the entered text.
Name (Last)	Text	Enter a name to show only monitorees with a last name that contains or matches the entered text.
Name (Middle)	Text	Enter a name to show only monitorees with a middle name that contains or matches the entered text.
Never Responded	Boolean (True/False)	Select "True" to show only monitorees who have no Sara Alert reports (and "False" for the opposite).
Notifications Paused	Boolean (True/False)	Select "True" to show only monitorees have Notifications Paused (and "False" for the opposite).
Preferred Reporting Method	Select	Select a preferred reporting method to show only monitorees who have that method selected.
Preferred Contact Time	Select	Select a Preferred Contact Time to show only monitorees who have that time selected.

APPENDIX A: ADVANCED FILTER FIELDS AND DESCRIPTIONS

Filter Name	Type	Description
Primary Language	Select	Select a Language to show only monitorees for whom that is the Primary Language. <b>NOTE:</b> Monitorees with a "Blank" Primary Language report in English. These will not appear when filtering for "English."
Requires Interpretation	Boolean (True/False)	Select "True" to show only monitorees who have "Requires Interpretation" selected (and "False" for the opposite).
Reported in last 24 hours	Boolean (True/False)	Select "True" to show only monitorees who have a symptom report that was created within past 24 hours (and "False" for the opposite). <b>NOTE:</b> This includes reports submitted by a user.
Exposure Risk Assessment	Select	Select a Risk Exposure level to show only monitorees who currently have that level selected.
Sara Alert ID	Text	Enter a Sara Alert ID (the last digits of the record's URL) to show only monitorees with that <b>EXACT ID</b> .
Sent Notification in last 24 hours	Boolean (True/False)	Select "True" to show only monitorees who received a notification from Sara Alert within the past 24 hours (and "False" for the opposite).
Symptom Onset	Date Picker	Specify a date range to show only monitorees with a Symptom Onset Date in that range.
Telephone Number (Exact Match)	Text	Enter a 10-digit phone number to show only monitorees with that <b>EXACT PRIMARY</b> phone number. <b>NOTE:</b> Sara Alert ignores all non-numerical characters input into this search filter
Telephone Number (Contains)	Text	Enter a partial phone number to show only monitorees with a <b>PRIMARY</b> phone number that <b>CONTAINS</b> the entered number. <b>NOTE:</b> This field accepts numbers only. <b>DO NOT</b> enter non-numerical characters.