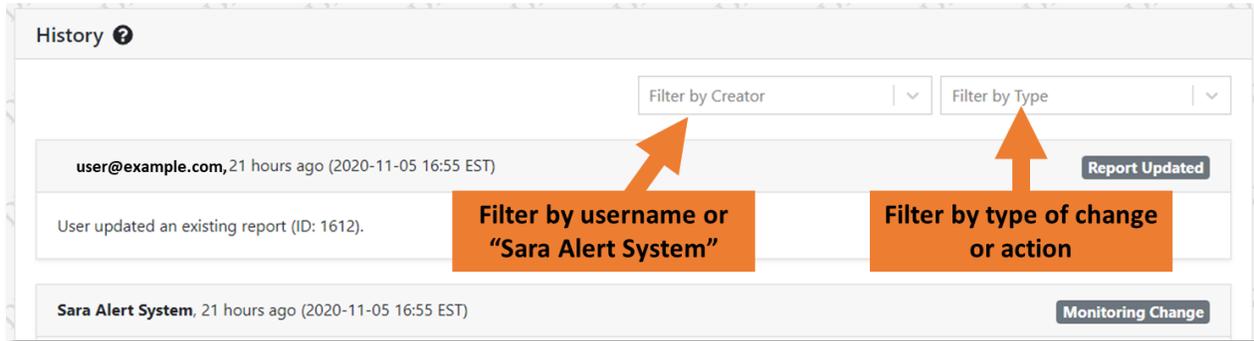




Use the History section to track automated contact attempts and monitoree record changes

All contact attempts and changes made to a monitoree’s record, whether they are made by a user or by the system, are documented in the History section at the bottom of the monitoree’s record.

Users can filter the history section by “Creator” (i.e., username or Sara Alert System) or “Type” (i.e., type of change or action). Users can select multiple values in each filter by holding down the Ctrl (PC) or Command (Mac) key.



The table below provides common scenarios for using the History section:

Scenario	Workflow	Preferred Contact Method	Creator	User Actions
I want to see the most recent action for this monitoree.	Either	Any	Either	1. Do not filter by Creator or Type 2. Topmost history element is the most recent action
I want to see when the most recent daily symptom report request was sent to this monitoree.	Either	E-mailed Weblink, SMS Text, SMS Weblink, Phone Call	System	1. Filter by Creator = “Sara Alert System” 2. Filter by Type = “Report Reminder” 3. Topmost history element is most recent
I want to see all comments left by a specific user for this monitoree	Either	Any	User	1. Filter by Creator = Username of interest 2. Filter by Type = “Comment”
I want to see all actions taken by the system for this monitoree	Either	Any	System	Filter by Creator = “Sara Alert System”
I want to add a comment to the history.	Either	Any	User	1. Scroll to the bottom of the monitoree’s record 2. Enter comment text and click “Add Comment”
I want to see when this monitoree was enrolled.	Either	Any	User	Filter by Type = “Enrollment”
I want to see when the welcome message was sent to this monitoree.	Either	E-mailed Weblink, SMS Text, SMS Weblink	System	Filter by Type = “Welcome Message Sent”
I want to see when Monitoring Actions, Household status, Last Date of Exposure, or Symptom Onset Date were changed for this monitoree.	Either	Any	Either	Filter by Type = “Monitoring Change”
I want to see when Sara Alert automatically closed this monitoree’s record.	Exposure	Any	System	Filter by Type = “Record Automatically Closed”
I want to see when a monitoree did not respond to a call or SMS text (not weblink) sent by the system.	Either	SMS Text, Phone Call	System	Filter by Type = “Contact Attempt”
I want to see when the Monitoree Details were edited.	Either	Any	User	Filter by Type = “Record Edit”