



Sara Alert TM

Secure monitoring and reporting for public health

Quick Start Guide

Isolation Workflow: Scenarios

Questions? Contact sarasupport@aimsplatform.com

Scenario	Starting Line List	Ending Line List	Action
PUI in exposure monitoring meets case definition. Sara Alert will be used to monitor case until recovery definition met.	PUI (Exposure Workflow)	Reporting or Non-Reporting	<ol style="list-style-type: none"> 1.Open case record 2.Change "Case Status" to "Confirmed" or "Probable" 3.Select "Continue Monitoring ..." 4.Click "Submit"
Public health confirms that a case meets the recovery definition and isolation can be safely discontinued	Records Requiring Review	Closed	<ol style="list-style-type: none"> 1.Open case record 2.Change "Monitoring Status" from "Actively Monitoring" to "Not Monitoring" 3.Select "Meets criteria to discontinue isolation" 4.Click "Submit" to save
Public health confirms that a case does not yet meet recovery definition and monitoring should continue	Records Requiring Review	Non-Reporting, Reporting	<ol style="list-style-type: none"> 1.Open case record 2.Update the "Extend Isolation To" date. The monitoree will not appear on the Records Requiring Review list until after that date.
User contacts a case who has not reported to Sara Alert in >24 hours; public health user has obtained daily report information and needs to add it to record	Non-Reporting	Reporting	<ol style="list-style-type: none"> 1.Open case record 2.Click "+ Add New Report" 3.Complete report 4.Click "Submit" to save
Case does not report directly to Sara Alert through web-link, text, or phone. Public health contacts case through other means (manual call, etc.) and needs to add report information.	Reporting Non-Reporting	Records Requiring Review, Reporting	<ol style="list-style-type: none"> 1.Open case record 2.Click "+ Add New Report" 3.Complete report 4.Click "Submit" to save
Users wants to document contact attempt to a case	Records Requiring Review, Non-Reporting, Reporting	Same as starting line list	<ol style="list-style-type: none"> 1.Open case record 2.Select "Log Manual Contact Attempt" 3.Select "Successful" or "Unsuccessful"
User wants to pause or resume daily report reminders to a case eligible to receive notifications (NOTE: Pausing notifications for a Head of Household will pause for all household members)	Non-Reporting, Reporting	Same as starting line list	<ol style="list-style-type: none"> 1.Open case record 2.Select "Pause Notifications" or "Resume Notifications" <p>(NOTE: Pause notifications is only available for monitorees on active line lists who are Head of Households or self-reporters)</p>
Manually close record from active monitoring (Note: The system will stop sending daily report reminders)	Non-Reporting, Reporting	Closed	<ol style="list-style-type: none"> 1.Open case record 2.Change "Monitoring Status" from "Actively Monitoring" to "Not Monitoring" 3.Document reason for change 4.Click "Submit" to save
Close records that meet specified criteria to end active monitoring (Note: The system will stop sending daily report reminders for selected monitorees)	Records Requiring Review, Non-Reporting, Reporting	Closed	<ol style="list-style-type: none"> 1.Identify records that meet criteria using "Advanced Filter" 2.Select records of interest from dashboard 3.Click "Bulk Actions" and select "Close Records" 4.Document reason for change 5.Click "Submit" to save the change
Case should be monitored by another jurisdiction	Records Requiring Review, Non-Reporting, Reporting, or Closed	Transferred Out	<ol style="list-style-type: none"> 1.Open case record 2.Click "Download Excel Export" to save record (if needs to be retained) 3.Change "Assigned Jurisdiction" to the new jurisdiction (from drop down list) 4.Click "Change Jurisdiction" to transfer
Case is continuously exposing contacts in the same reporting household	Reporting, Non-Reporting	Same as starting line list	<ol style="list-style-type: none"> 1.Open record of reporting household contact in the exposure workflow 2.Click "Continuous Exposure" and select appropriate toggle option 3.Close reporting household case when appropriate. Select toggle to update last date of exposure for household contacts with continuous exposure.
Users wants to document close contacts associated with a specific case	Records Requiring Review, Non-Reporting, Reporting	Same as starting line list	<ol style="list-style-type: none"> 1.Open case record 2.Scroll to "Close Contacts" 3.Click "Add New Close Contact" 4.<i>Public Health Enrollers</i> can enroll close contacts as monitorees by clicking "Enroll" under "Actions"