



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

# User Guide for Enrollers

Software Version 1.23  
February 23, 2021

---

# TABLE OF CONTENTS

<b>1</b>	<b>ABOUT SARA ALERT™</b>	<b>2</b>
1.1	Concept of Operations	2
1.2	Workflow Summary	3
<b>2</b>	<b>ENROLLER ROLE OVERVIEW</b>	<b>4</b>
2.1	Record Access	4
2.2	Enroller Capabilities	4
2.3	Workflow	4
<b>3</b>	<b>GETTING STARTED</b>	<b>5</b>
3.1	Logging In	5
<b>4</b>	<b>MONITOREE DETAILS/ENROLLMENT WIZARD</b>	<b>7</b>
4.1	Monitoree Identification	7
4.2	Monitoree Address	8
4.3	Monitoree Contact Information	8
4.4	Monitoree Arrival Information	9
4.5	Additional Planned Travel	9
4.6	Monitoree Potential Exposure or Case Information	9
<b>5</b>	<b>ENROLLER CAPABILITIES</b>	<b>11</b>
5.1	How to Enroll New Monitoree (Contact or Case)	11
5.2	How to Edit Monitoree Enrollment Information	13
5.3	How to Create a Reporting Household with a Head of Household Reporter Using the Enrollment Wizard	15
5.4	How to Change a Head of Household (Household Reporter)	18
5.5	How to Enroll a New Household Member into an Existing Household	19
5.6	How to Move an Existing Record into a Reporting Household	20
5.7	How to Remove a Household Member from an Existing Reporting Household	22
5.8	How to View Enrollment Analytics	24
<b>6</b>	<b>MONITOREE SELF-REPORTING OVERVIEW</b>	<b>25</b>
6.1	Monitoree Message Summary by Reporting Method	25
6.2	Summary of Messages Sent to Monitorees	26
6.3	Submitting Daily Reports to Sara Alert™ (Monitoree Self-Report Screenshots)	30

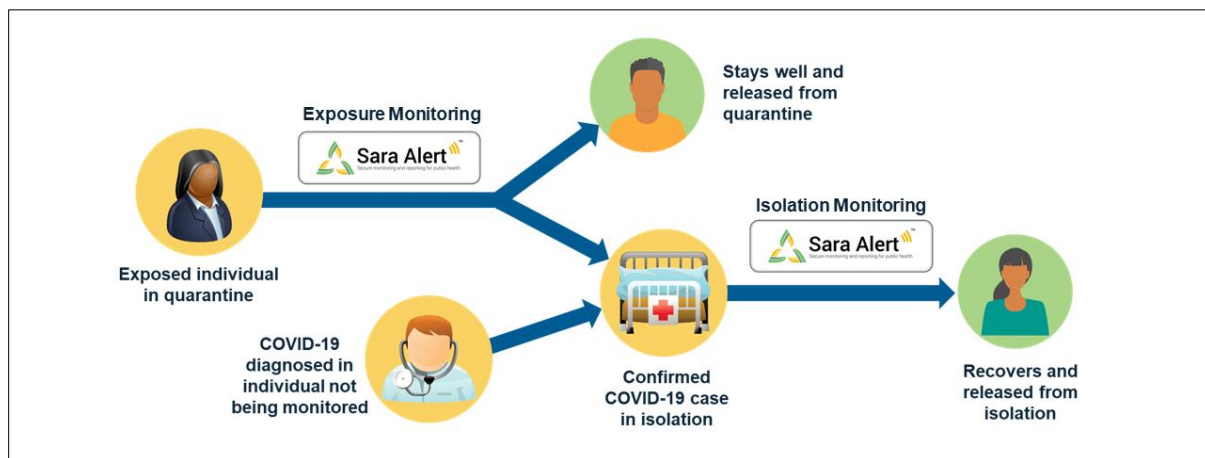
# 1 ABOUT SARA ALERT™

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

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

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

## 1.1 Concept of Operations

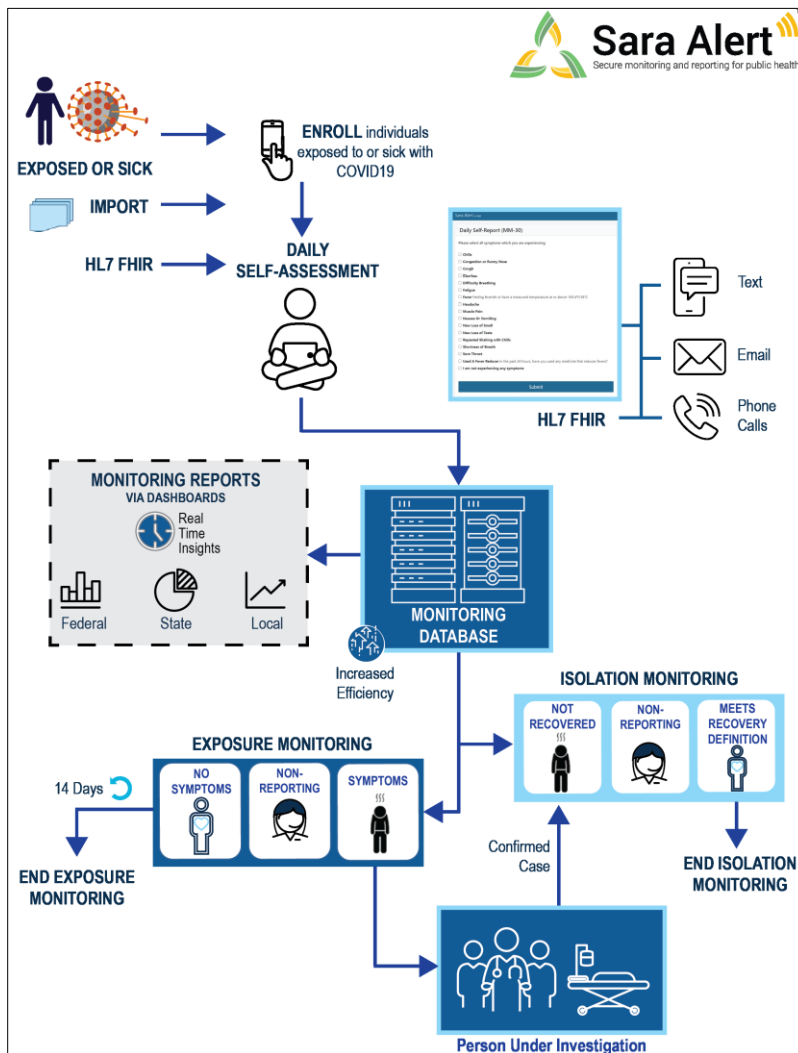


**Figure 1: Sara Alert™ Concept of Operations**

## 1.2 Workflow Summary

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

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



**Figure 2. Sara Alert™ Workflow Summary**

Visit [saraalert.org](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 ENROLLER ROLE OVERVIEW

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

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

**Table 1. Functional Role Summary**

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

### 2.1 Record Access

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

### 2.2 Enroller Capabilities

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

### 2.3 Workflow

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

## 3 GETTING STARTED

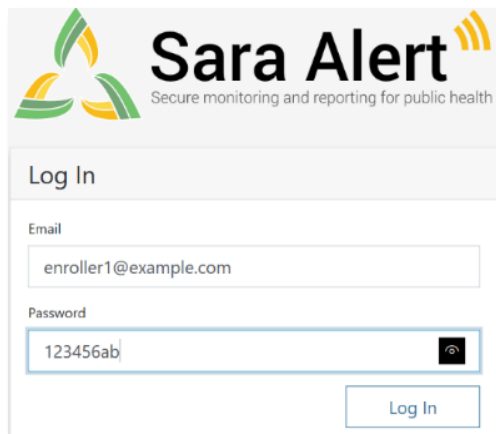
### 3.1 Logging In

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

2) Log in using your credentials.

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

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



**Figure 3: Log in screen**

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



**Figure 4: Enter your phone number.**

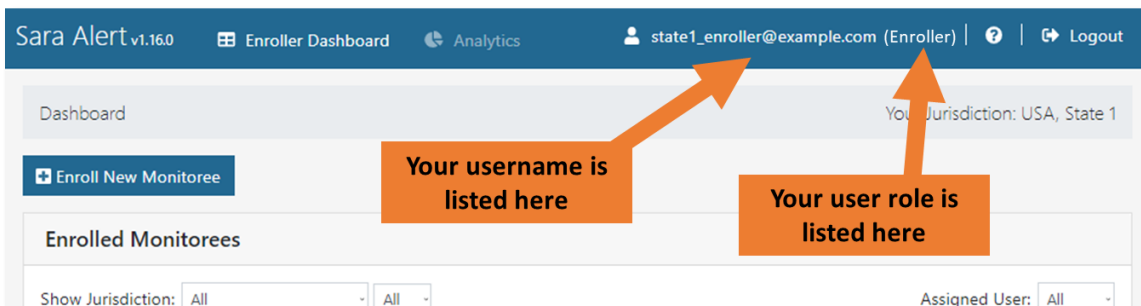
4) For all login attempts after initial registration, you will be prompted to choose how to receive the 7-digit 2FA token (i.e., SMS/Text or through a phone call).

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

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

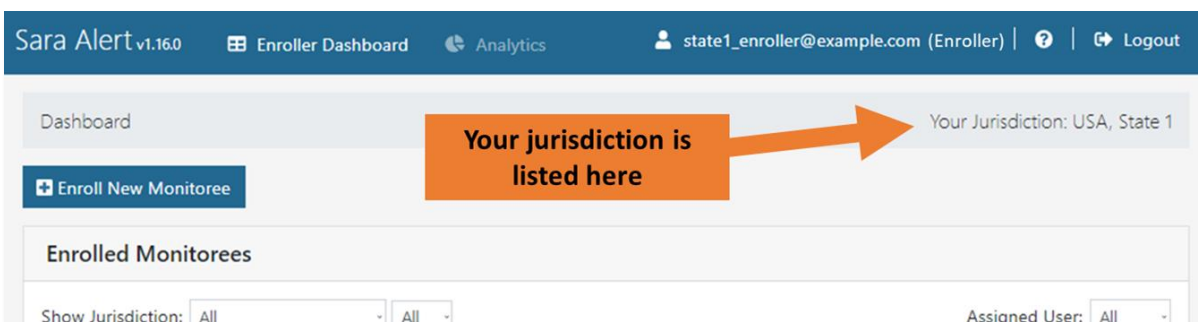
5) You will be taken to the Enrollment Dashboard

6) Your username and user role are listed in the upper right-hand corner of the screen.



**Figure 6: Your Sara Alert™ username and user role**

7) 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 jurisdiction access and assigned role.



**Figure 7: Your Sara Alert™ jurisdiction**

8) 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.

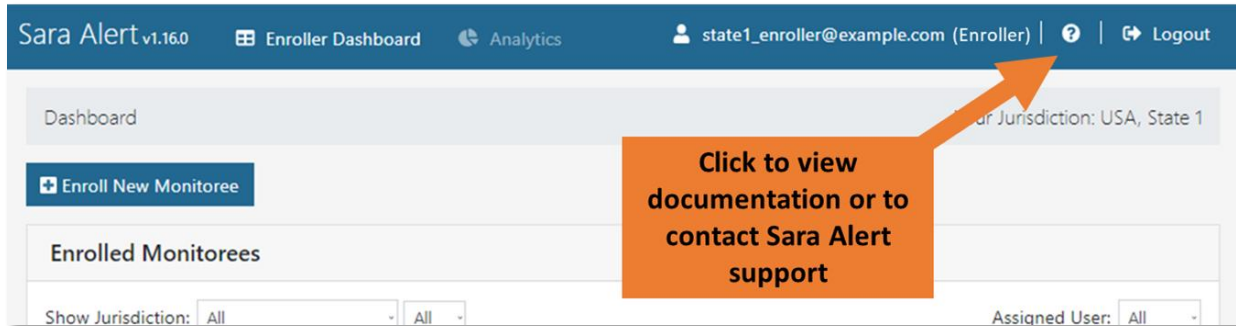


Figure 8: Access to Sara Alert™ resources

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

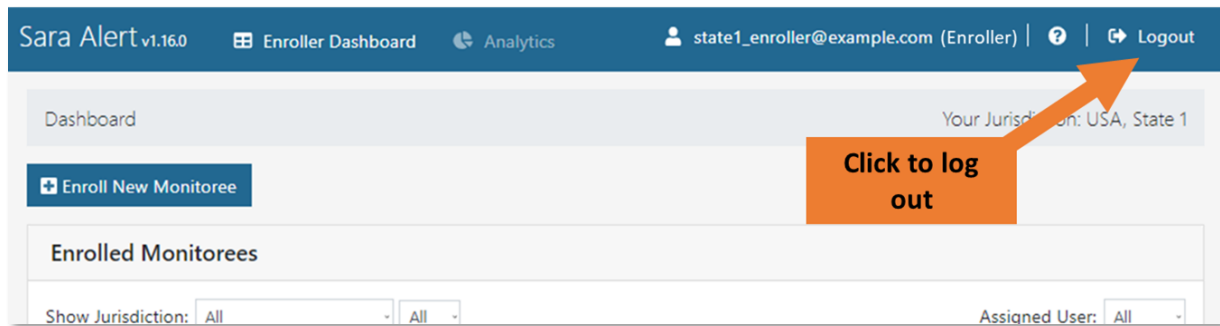


Figure 9: The logout button

## 4 MONITOREE DETAILS/ENROLLMENT WIZARD

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

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

### 4.1 Monitoree Identification

- Select workflow to enroll monitoree (exposure or isolation)
- Includes name and demographic information, as well as any existing state/local/Federal ID numbers
- Includes primary and secondary languages spoken by the monitoree. The primary language field is used to determine in what language the notifications from the system to the monitorees will be sent

- Languages that are not fully supported are designated with a \*. If a language is selected that is currently not supported, the system will send notifications in English

## 4.2 Monitoree Address

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

## 4.3 Monitoree Contact Information

- **“Preferred Reporting Method”** indicates how monitorees will receive notifications to submit daily symptoms reports (email, SMS text, phone, etc.)
  - Some fields are conditionally required depending on the selected “preferred reporting method”
  - Message and data rates may apply depending on the contact method selected
  - If a monitoree’s preferred reporting method is not yet known, the user may select **“Unknown”** and the monitoree will not receive notifications. This is the system default value
  - If a monitoree is enrolled in the system but has requested not to receive notifications, the user may select **“Opt-Out”** for preferred reporting method and the monitoree will not receive notifications
  - Monitorees with **“Opt-Out”** or **“Unknown”** selected will appear on the non-reporting line list the day after enrollment
  - The system will display a warning if a user attempts to enter a phone number that is currently blocking texts from Sara Alert. See **page 28** for more details.
- **“Preferred Contact Time”** should be specified for the monitoree to receive automated daily requests for symptoms
  - Morning is between 8 AM and noon in local time zone
  - Afternoon is between noon and 4 PM in local time zone
  - Evening is between 4 PM and 8 PM in local time zone
  - The local time zone for monitorees is determined by the monitoree’s **address state data element** located on the “Monitoree Address” enrollment screen. The time zone for each state has been assigned based on each state’s population center
    - If address state is left blank, the eastern time zone is used by default

---

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

---



---

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

---



---

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

---

## 4.4 Monitoree Arrival Information

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

## 4.5 Additional Planned Travel

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

## 4.6 Monitoree Potential Exposure or Case Information

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

### 4.6.1 Exposure Workflow

- **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 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.
- **Exposure Risk Factors:** Allows users to indicate if a monitoree 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 monitoree visited multiple healthcare facilities with known cases), use commas to separate multiple specified values.

- The “**Member of Common Exposure Cohort**” field can be used to track different types of shared exposures (i.e., outbreak at a workplace, facility, event, etc.)

#### 4.6.2 Isolation Workflow

- “**Symptom Onset**” date is used by the system to determine if the non test-based recovery definition in the isolation monitoring workflow has been met.
  - A user may enter a date that is up to 30 days after the current date.
- “**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>.

#### 4.6.3 Both Workflows

- The “**Assigned Jurisdiction**” field can be updated on enrollment.
  - The default jurisdiction will match the user’s assigned jurisdiction displayed in the upper right-hand corner of the screen.
  - The list of available jurisdictions at enrollment will only be populated with jurisdictions to which the user has access to (e.g., State enroller can assign cases to a local jurisdiction within state)
    - If a record needs to be transferred to a jurisdiction that the user does not have access to, a Public Health user, Public Health Enroller, or Super User will need to transfer the record after enrollment.
- The “**Assigned User**” field can be specified on enrollment.
  - Used to identify the user or group within a jurisdiction responsible for monitoring a monitoree
  - Each jurisdiction should determine their own Assigned User identification conventions (e.g., assign user number to each user, assign user number to groups or teams, assign user number to call center stations, etc.)
  - Each jurisdiction within the jurisdictional hierarchy can assign any allowed assigned user numbers; thus a state user and county user within that state can be assigned the same assigned user number unless a coding convention is established at the state level to prevent this. Thus, both the assigned jurisdiction and assigned user fields uniquely identifies each assigned user
  - This field does not change who can see or modify a record, it is instead intended to help jurisdictions organize and track which of their personnel are assigned to a given record
  - This field is optional and can be updated later

## 5 ENROLLER CAPABILITIES

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

1) Click the “Enroll New Monitoree” button.

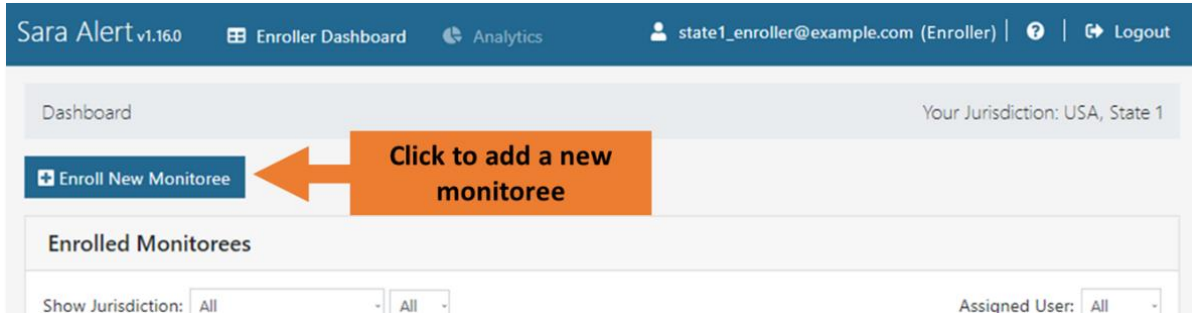


Figure 10: Enroll new monitoree

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 case

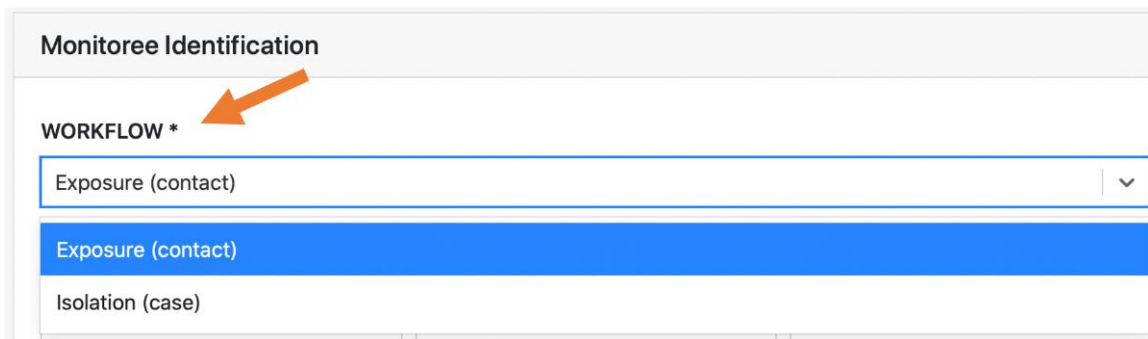


Figure 11: Select Exposure of Isolation workflow

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

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.

The screenshot shows the 'Monitoree Identification' form. It includes fields for WORKFLOW (Exposure (contact)), FIRST NAME (Donald), MIDDLE NAME(S), LAST NAME (Duck), DATE OF BIRTH (01/01/1970), AGE (50), SEX AT BIRTH, GENDER IDENTITY (Male), SEXUAL ORIENTATION, RACE (radio buttons for White, Black or African American, American Indian or Alaska Native, Asian, Native Hawaiian or Other Pacific Islander), LANGUAGE (Primary: English, Secondary), INTERPRETATION REQUIRED, NATIONALITY (USA), STATE/LOCAL ID, CDC ID, and NNDSS LOC. REC. ID/CASE ID. An orange callout box with the text 'Click “Next” to advance to the next section' has an arrow pointing to the 'Next' button at the bottom right.

**Figure 12: 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.

The screenshot shows the review screen with two main sections: 'POTENTIAL EXPOSURE INFORMATION' and 'NOTES'. The exposure information includes 'Last Date of Exposure: 10/19/2020', 'Exposure Location: West Vesta', and 'Exposure County: Northern'. The notes section is currently empty. At the bottom, there are four buttons: 'Previous', 'Finish and Add a Household Member', 'Finish', and 'Cancel'. Two orange callout boxes are present: one pointing to the '(Edit)' link next to the exposure information with the text 'Click “Edit” to edit that section', and another pointing to the 'Finish' button with the text 'Click to save the record'.

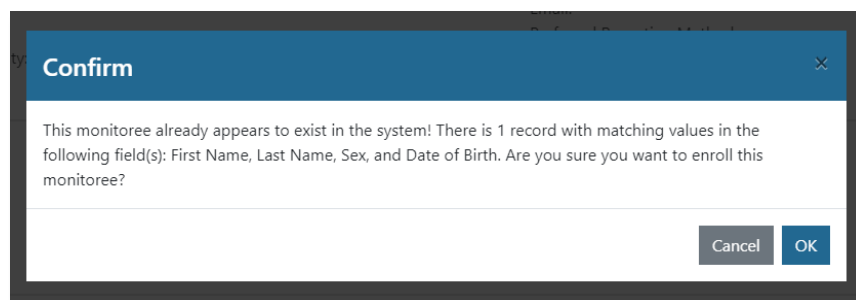
**Figure 13: Click “Finish” to save the record**

**NOTE:** If the monitoree’s Preferred Reporting Method and corresponding contact information (i.e., phone number or email address) matches that of an existing record among

records you have access to, the two records will be linked as a reporting household. See **page 22** for instructions on how to remove a record from a household.

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

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



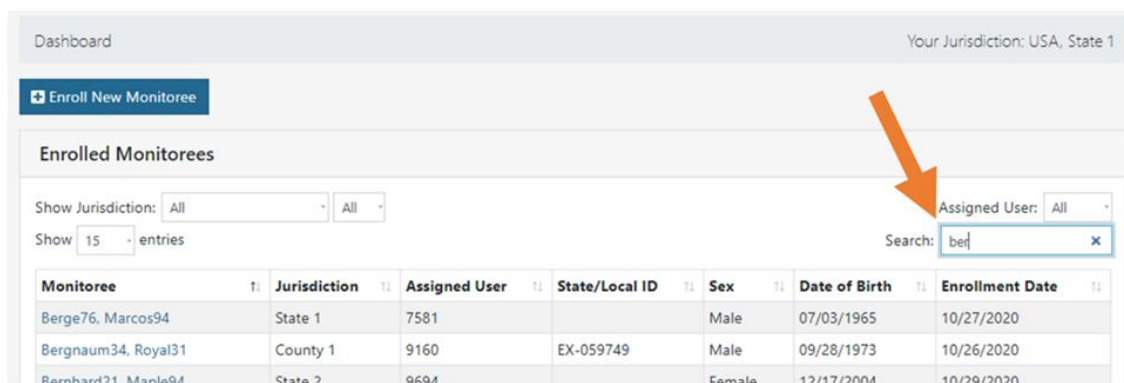
**Figure 14: A confirmation box will appear for potential duplicate records**

## 5.2 How to Edit Monitoree Enrollment Information

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

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

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



**Figure 15: Search enroller dashboard**

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

Dashboard Your Jurisdiction: USA, State 1

[+ Enroll New Monitoree](#)

**Enrolled Monitorees**

Show Jurisdiction: All All

Show 15 entries

Assigned User: All

Search:  ×

Monitoree	Jurisdiction	Assigned User	State/Local ID	Sex	Date of Birth	Enrollment Date
Berge76, Marcos94	State 1	7581		Male	07/03/1965	10/27/2020
Bergnaum34, Royal31	County 1	9160	EX-059749	Male	09/28/1973	10/26/2020
Bernhard21, Maple94	State 2	9694		Female	12/17/2004	10/29/2020

**Figure 16: Filter by jurisdiction or assigned user**

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

Dashboard Your Jurisdiction: USA, State 1

[+ Enroll New Monitoree](#)

**Enrolled Monitorees**

Show Jurisdiction: All All

Show 15 entries

Assigned User: All

Search:  ×

Monitoree	Jurisdiction	Assigned User	State/Local ID	Sex	Date of Birth	Enrollment Date
Berge76, Marcos94	State 1	7581		Male	07/03/1965	10/27/2020
Bergnaum34, Royal31	County 1	9160	EX-059749	Male	09/28/1973	10/26/2020
Bernhard21, Maple94	State 2	9694		Female	12/17/2004	10/29/2020

**Figure 17: Select monitoree record**

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

Monitoree Details (edit details)

Rebecca Airport HoH

**Click here to edit monitoree details**

Assigned Jurisdiction: USA  
Assigned User: 1

IDENTIFICATION CONTACT INFORMATION

**Figure 18: Modify monitoree record**

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

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

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

**NOTE:** If the Head of Household record is closed for any reason, the Head of Household will continue to receive daily symptom reports for the remaining reporting eligible household members. If the Head of Household no longer wishes to report on behalf of linked household members, a user should update the Head of Household (see [page 18](#)).

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

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

1) Enroll the Head of Household (see [page 10](#)). The first household member enrolled is defined as the default Head of Household (HOH). The HOH will be responsible for reporting on behalf of each subsequent household member enrolled (e.g., household reporter).

1) 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 19: Create household using enrollment wizard**

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

**Figure 20: 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.

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

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

Monitoree Review

Christi85 Boyle97

**IDENTIFICATION** (Edit)

DOB: 02/15/1974 Birth Sex: Female  
 Age: 47 Gender Identity: --  
 Language: English Sexual Orientation: --  
 State/Local ID: -- Race: Native Hawaiian or Other Pacific Islander  
 CDC ID: -- Ethnicity: Not Hispanic or Latino  
 NNDSS ID: -- Nationality: Réunionnais

**CONTACT INFORMATION** (Edit)

Phone: 555-555-0183  
 Preferred Contact Time: Evening  
 Type: Landline  
 Email: --  
 Preferred Reporting Method: Telephone call

**ADDRESS** (Edit)

HOME ADDRESS  
 Address 1: 10598 Todd Vista  
 Address 2: --  
 Town/City: San Jose Zip: 81925  
 Country: Botswana

**ARRIVAL INFORMATION** (Edit)

DEPARTED  
 Port of Origin: Gabriellfort  
 Date of Departure: 10/22/2020  
 Carrier: Otis Airlines  
 Flight or Vessel Number: 1945

**PLANNED TRAVEL** (Edit)

ARRIVAL  
 Port of Entry: Lake Jeromy  
 Date of Arrival: 10/22/2020  
 None

**POTENTIAL EXPOSURE INFORMATION** (Edit)

Last Date of Exposure: 10/19/2020  
 Exposure Location: West Vesta Exposure Country: Northern Mariana Islands  
 Risk Factors  
 MEMBER OF A COMMON EXPOSURE COHORT: Match

**NOTES** (Edit)

None

Assigned Jurisdiction: USA, State 1  
 Assigned User: 4

Previous Finish and Add a Household Member Finish Cancel

**Figure 21: Sara Alert™ Automatically Pre-Populates Information for Household Members**

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

**POTENTIAL EXPOSURE INFORMATION** (Edit)

Last Date of Exposure: 10/19/2020  
 Exposure Location: West Vesta Exposure Country: Northern Mariana Islands  
 Risk Factors  
 MEMBER OF A COMMON EXPOSURE COHORT: Match

**NOTES** (Edit)

None

Click to save the record and add another monitoree to the same household

Previous Finish and Add a Household Member Finish Cancel

**Figure 22: Monitoree record review**

5) 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.

**POTENTIAL EXPOSURE INFORMATION** (Edit)

Last Date of Exposure: 10/19/2020

Exposure Location: West Vesta Exposure Country: Northern Mariana Islands

**Risk Factors**  
MEMBER OF A COMMON EXPOSURE COHORT: Match

**NOTES** (Edit)  
None

Previous Finish and Add a Household Member **Finish** Cancel

Click to save the record and add stop enrolling new household members

**Figure 23: Click “Finish” once all household members have been enrolled**

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

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

Monitoree Details (edit details)

**Flynn White** HoH

Assigned Jurisdiction: USA  
Assigned User: 31

**IDENTIFICATION**

DOB: 09/09/1976 Birth Sex: Unknown  
Age: 44 Gender Identity: --  
Language: -- Sexual Orientation: --  
State/Local ID: -- Race: --  
CDC ID: -- Ethnicity: --  
NNDSS ID: 999999 Nationality: --

**CONTACT INFORMATION**

▼ Show address, travel, exposure, and case information

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

Name	Workflow	Monitoring Status	Continuous Exposure?
White, Walter	Exposure	Actively Monitoring	No
White, Holly	Exposure	Actively Monitoring	No

Change Head of Household

The Head of Household's Record shows a table with household members

**Figure 24: The Head of Household's record**

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

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

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

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

The screenshot shows a user interface for a household record. At the top, it displays 'NNDSS ID: 999999' and 'Nationality: --'. Below this is a section titled 'Show address, travel, exposure, and case information'. A table lists household members: 'Badger, Bucky' and 'White, Holly'. An orange callout box with an arrow points to the 'Change Head of Household' button at the bottom left of the table. The callout text reads: 'Click here to change which household member is Head of Household'.

**Figure 25: Click “Change Head of Household”**

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

The screenshot shows a dialog box titled 'Edit Head of Household'. It contains a section 'Select The New Head Of Household' with a note: 'Note: The selected monitoree will become the responder for the current monitoree and all others within the list'. Below the note is a drop-down menu. An orange arrow points to the name 'Badger, Bucky' in the drop-down list.

**Figure 26: Select the preferred Head of Household**

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

This screenshot is similar to Figure 26, showing the 'Edit Head of Household' dialog box. The drop-down menu now displays 'Badger, Bucky'. An orange arrow points to the 'Update' button at the bottom right of the dialog box, next to a 'Cancel' button.

**Figure 27: Click Update to save the Head of Household**

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

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

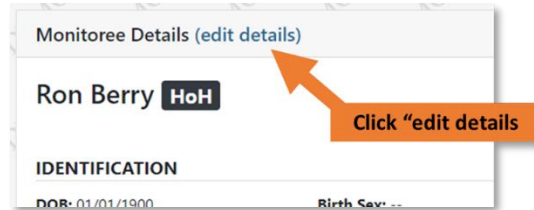


Figure 28: Edit HOH record to add new household member

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

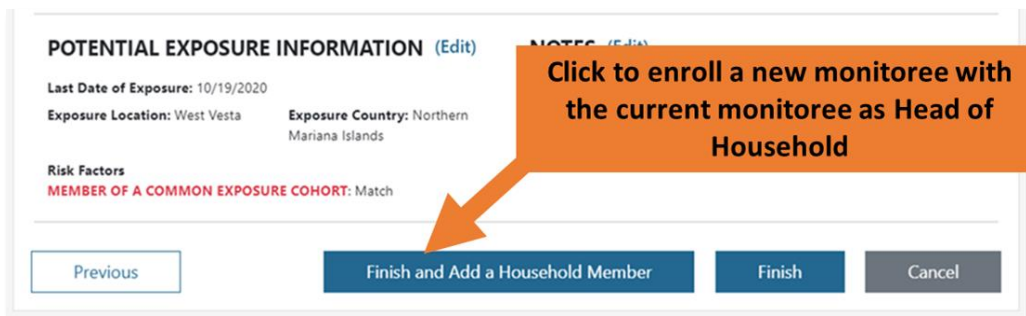


Figure 29: Select "Finish and Add a Household Member" to add new household member

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.

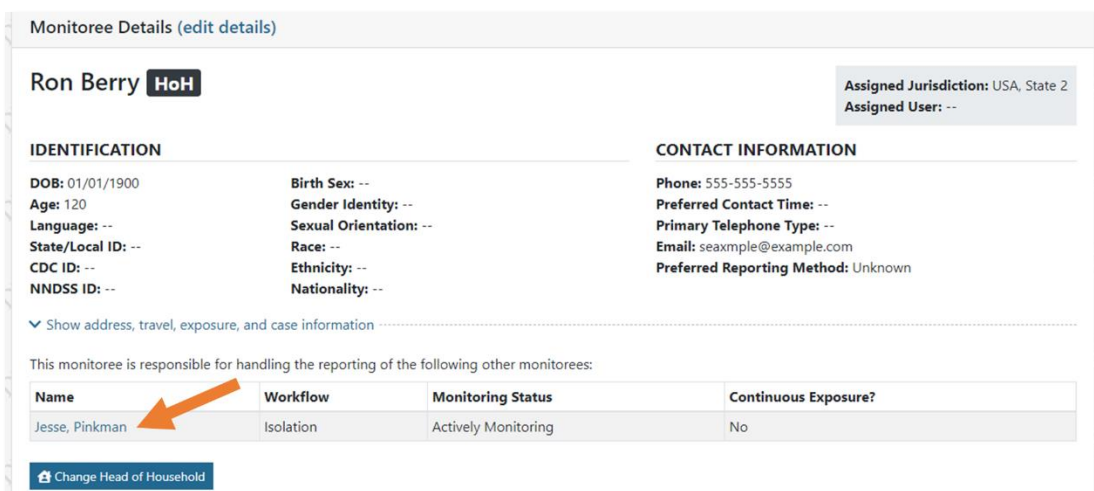


Figure 30: New household member has been linked to HoH

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

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

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

Monitoree Details (edit details)

**Testudo Terrapin**

Assigned Jurisdiction: USA  
Assigned User: --

IDENTIFICATION	CONTACT INFORMATION
<b>DOB:</b> 01/01/2001 <b>Age:</b> -- <b>Language:</b> -- <b>State/Local ID:</b> -- <b>CDC ID:</b> -- <b>NNDSS ID:</b> -- <b>Birth Sex:</b> Unknown <b>Gender Identity:</b> -- <b>Sexual Orientation:</b> -- <b>Race:</b> -- <b>Ethnicity:</b> --	<b>Phone:</b> 555-555-5555 <b>Preferred Contact Time:</b> -- <b>Primary Telephone Type:</b> -- <b>Email:</b> <b>Preferred Reporting Method:</b> E-mailed Web Link

▼ Show address, travel, exposure, and household information

This monitoree is not a member of a household:

**Move To Household**

**Click to add this monitoree to a household**

**Figure 31: Click "Move to Household"**

- 2) This will open the “Move to Household” window, which contains a list of all monitorees in either workflow who currently are reporters, either a Head of Household or not in a household (self-reporters).

- Users can use the “Search” bar to find monitorees 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
- Users can sort columns in the same way as on the Enroller Dashboard
- Users can change the number of monitorees shown on a page and navigate the pages of monitorees in the same way as on the Enroller Dashboard

**NOTE:** The list will only populate with names of monitorees that a user has access to. For an Enroller, this is only records created by that user.

**Move To Household**

Please select the new monitree that will respond for **Testudo Terrapin**.

You may select from the provided existing Head of Households and monitrees who are self reporting. Testudo Terrapin will be immediately moved into the selected monitree's household.

**Search for a monitree by name, ID, or DOB**

Search

Monitree	State/Local ID	Jurisdiction	Date of Birth	
Terrapin, Testudo		USA	2001-01-01	Select
TEst, Test Exposre			1950-01-01	Select
HistoryNotifs, Testing	HoH		1990-01-01	Select
HistoryNotifs3, Testing		USA	2010-01-05	Select
Test1r110, Test1		USA	1990-03-08	Select

Click to sort that column

Can display up to 10 rows per page

Click to navigate to other pages

Showing 5 out of 4704 rows.

Previous 1 2 3 4 5 ... 941 Next

Cancel

**Figure 32: The list of monitrees can be navigated in the same way as the Monitoring Dashboards**

3) Click “**Select**” to add the current monitree to the selected monitree’s household. The selected monitree will report on their behalf as Head of Household.

**Move To Household**

Please select the new monitree that will respond for **Testudo Terrapin**.

You may select from the provided existing Head of Households and monitrees who are self reporting. Testudo Terrapin will be immediately moved into the selected monitree's household.

Search

Monitree	State/Local ID	Jurisdiction	Date of Birth	
Terrapin, Testudo		USA	2001-01-01	Select
TEst, Test Exposre		USA		Select
HistoryNotifs, Testing	HoH	USA	1990-01-01	Select
HistoryNotifs3, Testing		USA	2010-01-05	Select
Test1r110, Test1		USA	1990-03-08	Select

Click to add the current monitree

Showing 5 out of 4704 rows.

Previous 1 2 3 4 5 ... 941 Next

Cancel

**Figure 33: Click “Select” to move the monitree into the selected household**

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

Monitoree Details ([edit details](#))

**Testudo Terrapin** Assigned Jurisdiction: USA  
Assigned User: --

IDENTIFICATION		CONTACT INFORMATION
DOB: 01/01/2001	Birth Sex: Unknown	Phone: 555-555-5555
Age: --	Gender Identity: --	Preferred Contact Time: --
Language: --	Sexual Orientation: --	
State/Local ID: --	Race: --	
CDC ID: --	Ethnicity: --	
NNDSS ID: --	Nationality: --	

[Show address, travel, exposure, and case information](#)

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

[Remove From Household](#)

Figure 34: The selected HoH is now responsible for reporting on behalf of the monitoree

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

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

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

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

Monitoree Review

**Christi85 Boyle97** Assigned Jurisdiction: USA, State 1  
Assigned User: 4

IDENTIFICATION ( <a href="#">Edit</a> )		CONTACT INFORMATION ( <a href="#">Edit</a> )
DOB: 02/15/1974	Birth Sex: Female	Phone: 555-555-0183
Age: 47	Gender Identity: --	Preferred Contact Time: Evening
Language: English	Sexual Orientation: --	Type: Landline
State/Local ID: --	Race: Native Hawaiian or Other Pacific Islander	Email: oldemail@example.com
CDC ID: --	Ethnicity: Not Hispanic or Latino	Preferred Reporting Method: E-mailed Web Link
NNDSS ID: --	Nationality: Réunionnais	

Figure 35: Edit contact information for record to be removed from household

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

**Monitoree Contact Information**

PREFERRED REPORTING METHOD \*

E-mailed Web Link

PRIMARY TELEPHONE NUMBER

+1555555555

PRIMARY PHONE TYPE

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

E-MAIL ADDRESS

newemail@example.com

CONFIRM E-MAIL ADDRESS

**Figure 36: Update telephone number and email address**

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

**Monitoree Details (edit details)**

Christi85 Boyle97

Assigned Jurisdiction: USA  
Assigned User: --

**IDENTIFICATION**

DOB: 01/01/1920  
Age: 100  
Language: --  
State/Local ID: --  
CDC ID: --  
NNDSS ID: --

Birth Sex: --  
Gender Identity: --  
Sexual Orientation: --

**CONTACT INFORMATION**

Phone: 555-555-5555  
Preferred Contact Time: --  
Primary Telephone Type: --  
Email: example@example.com  
Preferred Reporting Method: --

▼ Show address, travel, exposure, and

The reporting responsibility for this monitoree is handled by another monitoree. Click here to view that monitoree.

[Remove From Household](#)

Click here to remove the monitoree from the household

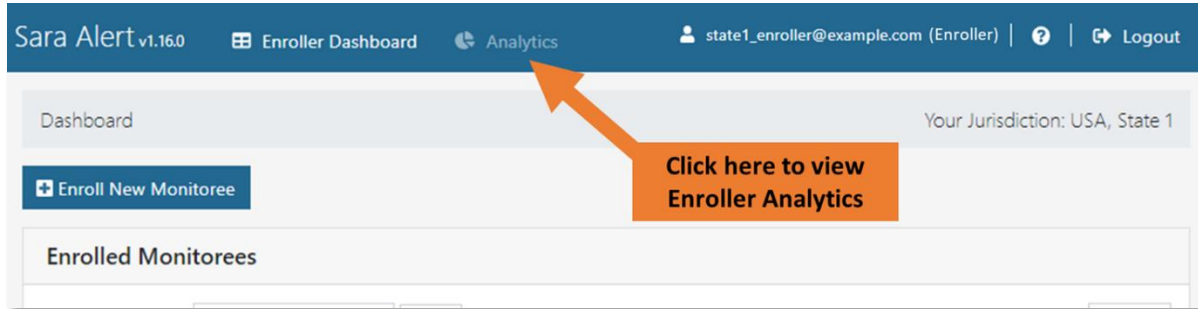
**Figure 37: Select “Remove Household” to complete action**

## 5.8 How to View Enrollment Analytics

The analytics summary for enrollers shows:

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

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



**Figure 38: View enrollment analytics**

## 6 MONITOREE SELF-REPORTING OVERVIEW

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

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

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

### 6.1 Monitree Message Summary by Reporting Method

Below is a summary of messages sent to monitorees that are eligible to receive notifications from the system during their preferred contact time by the selected reporting method. Records with “unknown” or “opt-out” do not receive messages so are not included in the summary.

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

	E-mailed Web Link	SMS-Texted Weblink	SMS Text message	Telephone Call
<b>Welcome message<sup>1</sup></b>	Sent immediately following enrollment; includes weblink for daily report.	Sent immediately following enrollment; includes monitorer initials and age, as well as a link to the Sara Alert website/privacy policy.	Sent immediately following enrollment; includes monitorer initials and age, as well as a link to the Sara Alert website/privacy policy.	No welcome message sent
<b>Initial Daily Report Timing</b>	Sent with Welcome Message	Day after enrollment during Preferred Contact Time	Day after enrollment during Preferred Contact Time	During Preferred Contact Time (can be day of enrollment)
<b>Reminder Message Sent if no response?</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>How long does the monitorer have to submit their report?</b>	No limit. Monitorees can report using their weblink at any time.	No limit. Monitorees can report using their weblink at any time.	18 hours from when the text is sent.	N/A (monitorees must answer the phone call to report)
<b>When is the “Monitoring Complete” message sent?</b>	Sent if a monitorer is on the Asymptomatic line list (in the Exposure workflow) when the monitoring period ends	No “Monitoring Complete” message for these monitorees <sup>3</sup>	No “Monitoring Complete” message for these monitorees <sup>3</sup>	No “Monitoring Complete” message for these monitorees <sup>3</sup>

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

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

<sup>3</sup> If a monitorer has an email address in the system but reports via another contact method, they will receive a “monitoring complete” email if they are on the Asymptomatic line list (in the Exposure workflow) when the monitoring period ends.

	E-mailed Web Link	SMS-Texted Weblink	SMS Text message	Telephone Call
<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	A single text that identifies the monitoree by initials and age and 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
<b>Daily Message Format (Reporting Household)</b>	Single email with weblinks for each active household member (denoted by initials and age)	One text for each active household member. Each text identifies the household member by initials and age and 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

## 6.2 Summary of Messages Sent to Monitorees

### 6.2.1 Language

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

### 6.2.2 Welcome Message (Email and SMS only)

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 the monitoree’s initials and age, as well as a link to the Sara Alert website/privacy policy.
- **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.

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

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

- **SMS Messages** (web-link or text): Daily symptom report messages will be sent once a day starting with the first preferred contact time period **on the day after enrollment**.
  - **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 2.
- **Email:** The initial symptom report will be sent as part of the welcome message with subsequent daily reports sent at the monitoree's preferred contact time.
- **Telephone Call:** If enrollment occurs during the monitoree's preferred contact time, the system will send daily report messages every day starting at time of enrollment. If enrollment occurs outside of the monitoree's preferred contact time, the system will send out daily report messages every day starting during the next preferred contact time period.
  - **EXAMPLE:** If a monitoree is enrolled at 4 pm EST on June 1, but their preferred contact time is morning, they will receive daily symptom report messages every day they are eligible between 8 am – noon EST starting on June 2.
  - **EXAMPLE:** If a monitoree is enrolled at 4 pm EST on June 1, but their preferred contact time is evening, they will receive daily symptom report messages every day they are eligible between 4 pm- 8 pm starting on June 1.

#### 6.2.3.1 Monitoree Time Zone

The “Preferred Contact Time” field is relative to a monitoree's time zone. The monitoree's time zone is determined by the following Monitoree Address fields:

- If the monitoree has a “State” entered in the “Address at Destination in USA Where Monitored” section, the monitoree's time zone is set to that state capital's time zone.

- If the above field is blank, the “State” entered in the “Home Address Within USA” tab is used. The monitoree’s time zone is set to that state capital’s time zone.
- If both of the above “State” fields are blank, US Eastern Time is used.

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

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

- **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.

#### 6.2.5 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 who have an email address entered in Sara Alert.

#### 6.2.6 Monitoree SMS Opt-Out (SMS-Text Message and SMS Texted Weblink)

At any time, monitorees can opt-out of Sara Alert’s automated symptom monitoring text messages by replying to one of their daily SMS-Text Message or SMS Texted Weblink symptom report requests with “Stop” (not case sensitive). If a monitoree does this, the system will no longer be able to send SMS-Text Messages or SMS Texted Weblinks to that phone number until that phone texts “Start” to the Sara Alert phone number.

**NOTE:** Monitorees can still be contacted via Telephone Call using the same phone number

A blocked number will be indicated in the Monitoree Details section of the monitoree's record. The text "SMS Blocked" will appear next to the blocked phone number and the preferred contact method will be displayed in red if an SMS-based method is selected.

**Monitoree Details** (edit details)

**John Q Public** **HoH**

Assigned Jurisdiction: USA, State 1  
Assigned User: --

IDENTIFICATION		CONTACT INFORMATION
DOB: 06/15/1940	Birth Sex: Male	Phone: 555-555-5555 SMS Blocked
Age: 80	Gender Identity: Male (Identifies as male)	Preferred Contact Time: Afternoon
Language: English	Sexual Orientation: --	Primary Telephone Type: --
State/Local ID: --	Race: American Indian or Alaska Native	Email: johnqpublic@gmail.com
CDC ID: --	Ethnicity: --	Preferred Reporting Method: SMS Text-message
NNDSS ID: --	Nationality: American	

✓ Show address, travel, exposure, and case information

**Callouts:**  
 - Blocked numbers are identified (points to SMS Blocked)  
 - Red text if SMS-based reporting method picked for blocked number (points to SMS Text-message)

**Figure 39: The Monitoree Details section will show that the monitoree's phone number has blocked Sara Alert**

When enrolling or updating, including if editing after importing monitorees, the system will display a warning if you enter a phone number that has blocked text messages from Sara Alert.

**Monitoree Contact Information**

PREFERRED REPORTING METHOD: SMS Text-message

PREFERRED CONTACT TIME: Morning

Morning: Between 8:00 and 12:00 in monitoree's timezone  
 Afternoon: Between 12:00 and 16:00 in monitoree's timezone  
 Evening: Between 16:00 and 20:00 in monitoree's timezone

PRIMARY TELEPHONE NUMBER \*: 555-555-5555 SMS Blocked

**Warning:** SMS-based reporting selected and this phone number has blocked SMS communications with Sara Alert.

**Callout:** The system will indicate if a phone number has blocked text messages from Sara Alert (points to SMS Blocked)

**Figure 40: The Enrollment Wizard will show a warning if you enter a phone number that has blocked Sara Alert**

## 6.3 Submitting Daily Reports to Sara Alert™ (Monitoree Self-Report Screenshots)

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.

**Tip:** See the [Quick Start Guide for Helping Monitorees with Daily Reports](#)

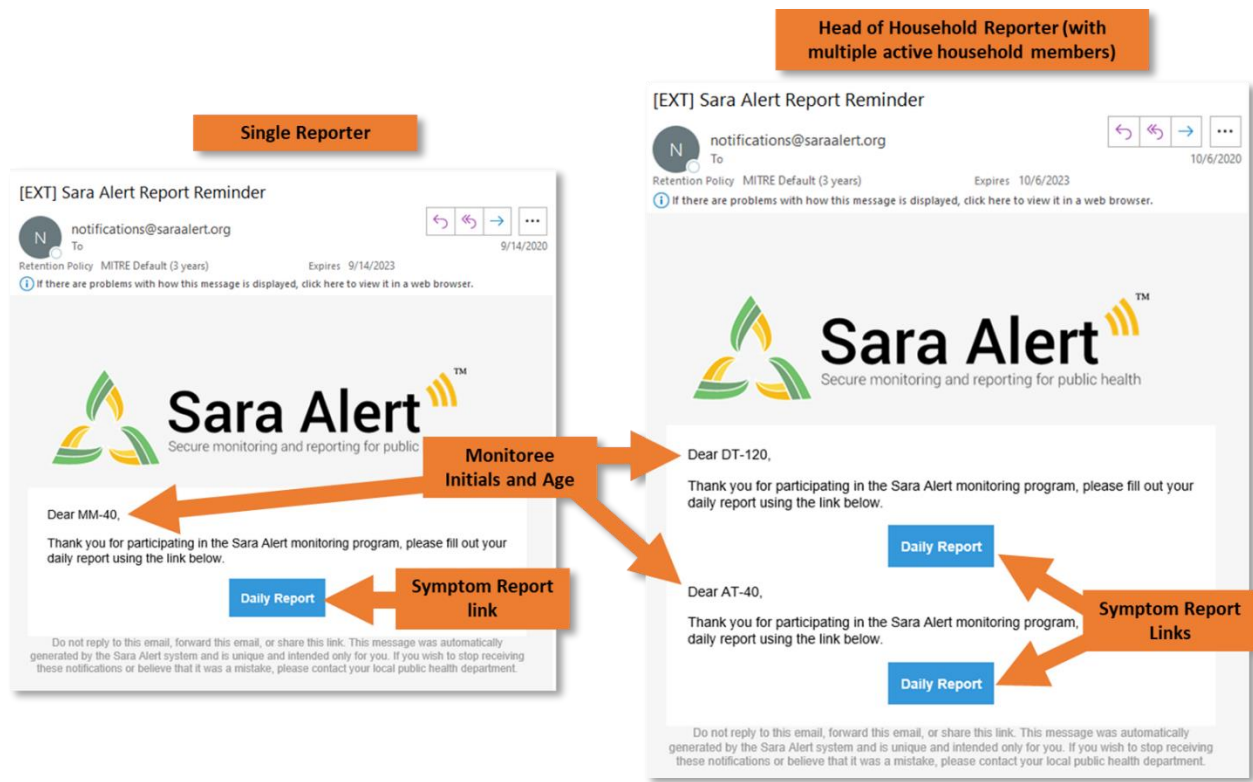
**NOTE:** Sara Alert™ current supports sending notifications to monitorees in multiple languages (see [page 26](#)).

### 6.3.1 E-mailed Web Link

Monitorees who report via E-Mailed Web Link will receive a daily email formatted as shown below. Heads of Households will receive a separate daily text for each active monitoree. The monitoree's age and initials will appear at the end of each weblink as well as at the top of the Daily Report.

Email notifications will always come from the same email address. The trusted email address is shared with jurisdictions at the time of onboarding.

**NOTE:** Exact formatting may vary depending on the email client the monitoree uses.



**Figure 41: Example daily symptom request emails sent to monitorees**

1) Monitorees click on the symptom report link to open their daily report:

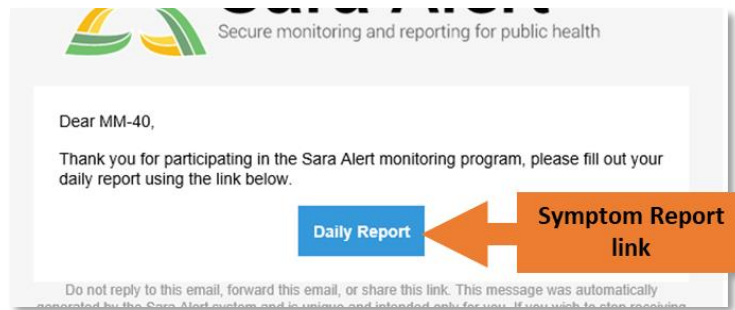


Figure 42: Example daily symptom request emails sent to monitorees

2) The monitoree's daily report will open in a browser window. The monitoree can then indicate symptoms by checking the corresponding boxes. If a monitoree is **not symptomatic**, they can indicate this by **either**:

- Checking the "I am not experiencing any symptoms" box and clicking "Submit".
  - If the "I am not experiencing any symptoms" box has been checked, all other symptom boxes will become uncheckable.
  - If a symptom has been indicated, the "I am not experiencing any symptoms" box becomes uncheckable
- Leaving all symptom boxes unchecked and clicking "**Submit**"

**NOTE:** The exact appearance of the symptom report will differ depending on the monitoree's internet browser.

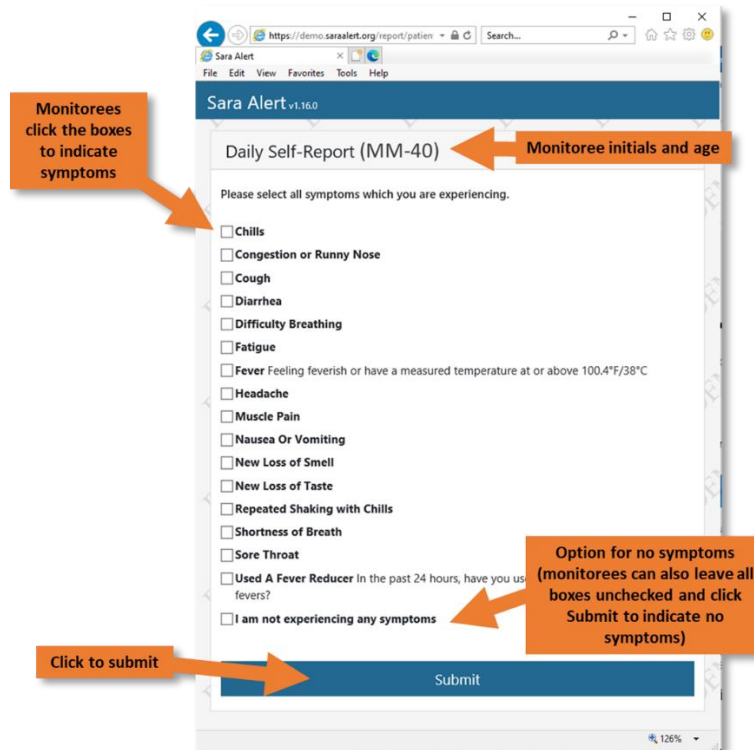


Figure 43: Example daily symptom request emails sent to monitorees

- 3) After submitting their report, the monitoree will be shown a message confirming their report was completed. The exact content may differ between jurisdictions.

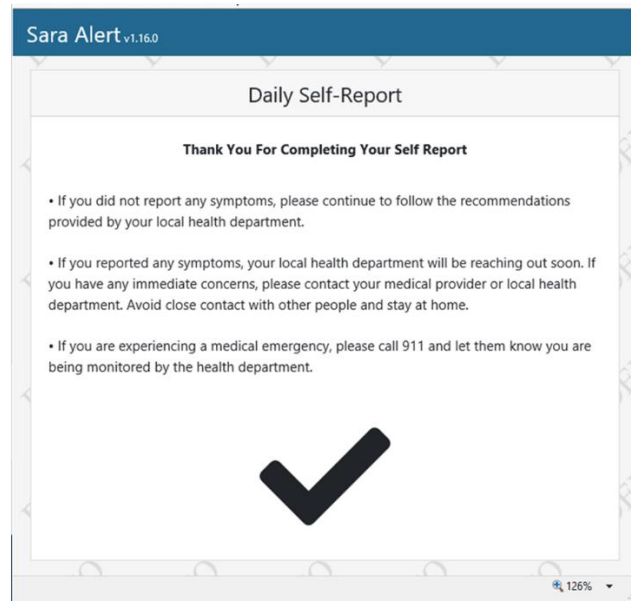


Figure 44: Confirmation message

### 6.3.2 SMS Texted Weblink

Monitorees who report via SMS Texted Weblink will receive daily text messages as shown below. Heads of Households will receive a separate daily text for each active monitoree. The monitoree's age and initials will appear at the end of each weblink as well as at the top of the Daily Report.

**NOTE:** Exact formatting may vary depending on the phone the monitoree uses.

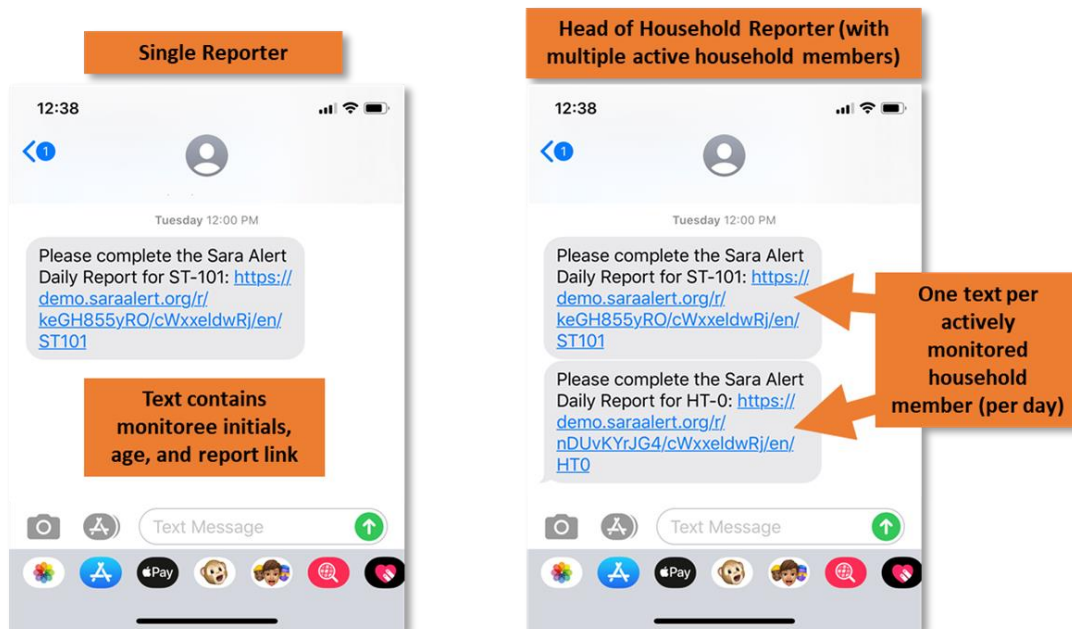
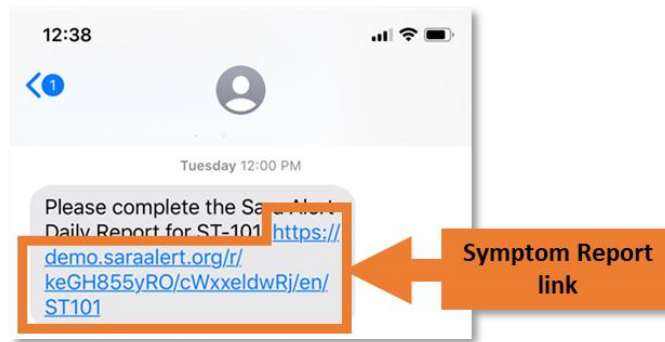


Figure 45: Example daily symptom request text messages sent to monitorees

- 1) Monitorees click on the symptom report link to open their daily report:

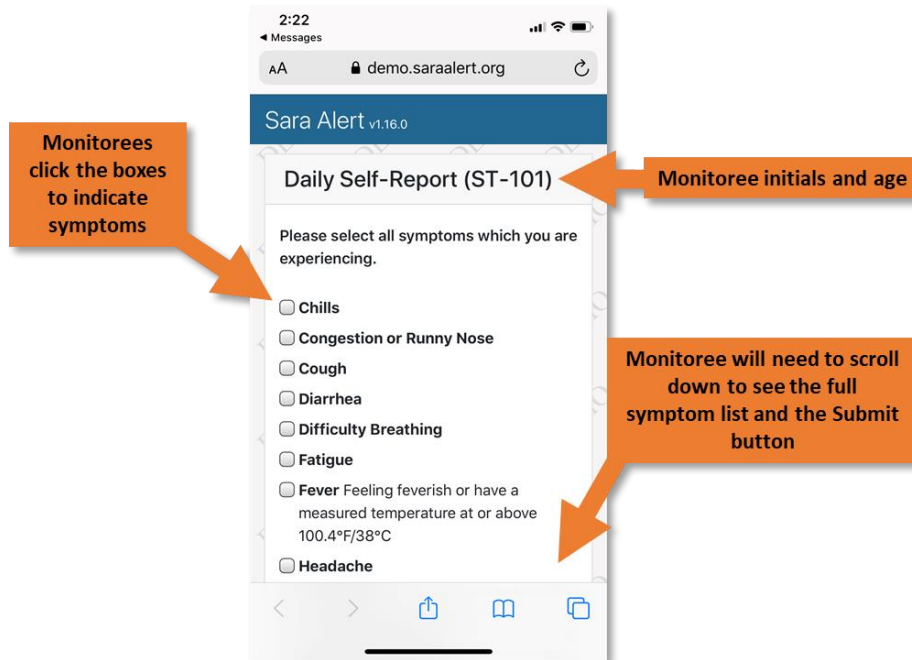


**Figure 46: Symptom report link within the text**

- 2) The monitoree's daily report will open in a browser window. The monitoree can then indicate symptoms by checking the corresponding boxes. If a monitoree is **not symptomatic**, they can indicate this by **either**:

- Checking the "I am not experiencing any symptoms" box and clicking "Submit".
  - If the "I am not experiencing any symptoms" box has been checked, all other symptom boxes will become uncheckable.
  - If a symptom has been indicated, the "I am not experiencing any symptoms" box becomes uncheckable
- Leaving all symptom boxes unchecked and clicking "**Submit**"

**NOTE:** The exact appearance of the symptom report will differ depending on the monitoree's phone and internet browser. In most cases, monitorees will need to scroll down to access the full symptom list and Submit button.



**Figure 47: Example daily self-report for someone reporting via SMS Web Link**

- 3) After submitting their report, the monitoree will be shown a message confirming their report was completed. The exact content may differ between jurisdictions.

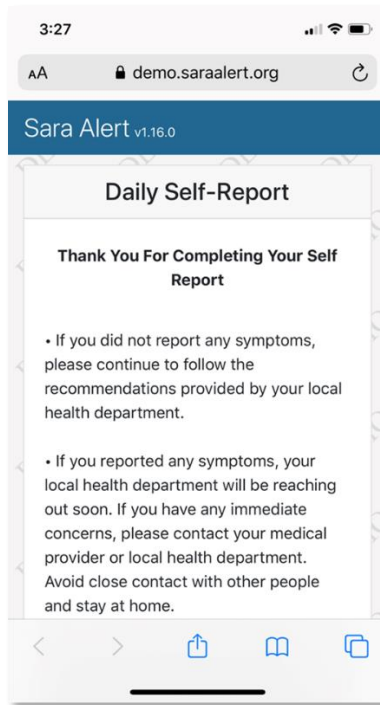


Figure 48: SMS Web Link confirmation message

### 6.3.3 SMS-Text Message

Monitorees who report via SMS Text Message will receive daily text messages as shown below. Heads of Households will receive a single text for all monitorees in their household.

**NOTE:** Exact formatting may vary depending on the phone the monitoree uses.

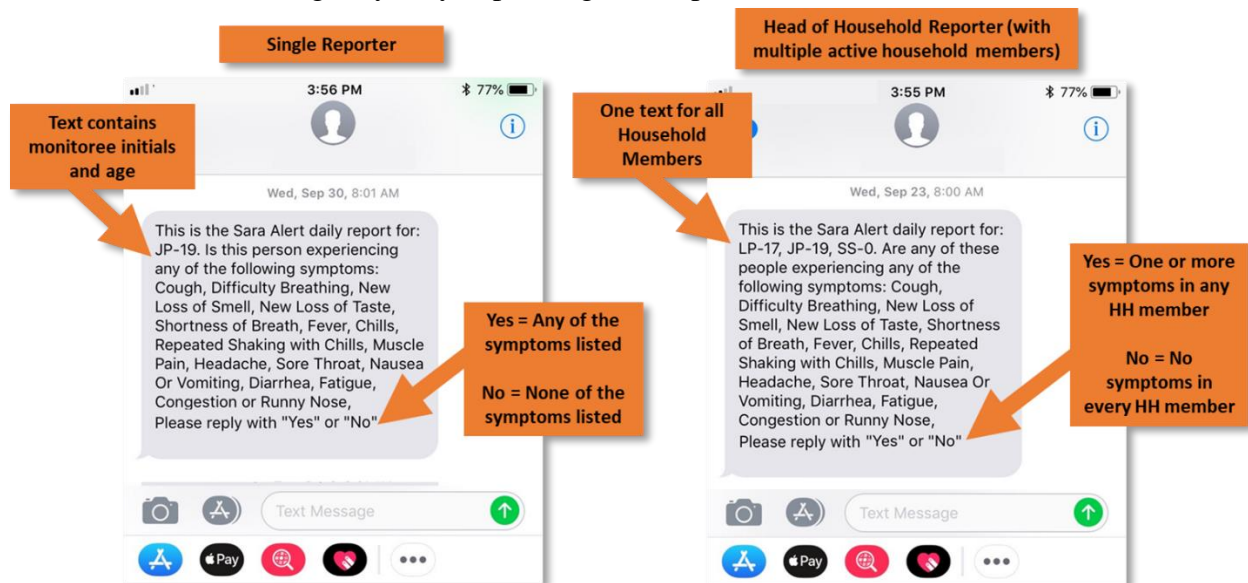
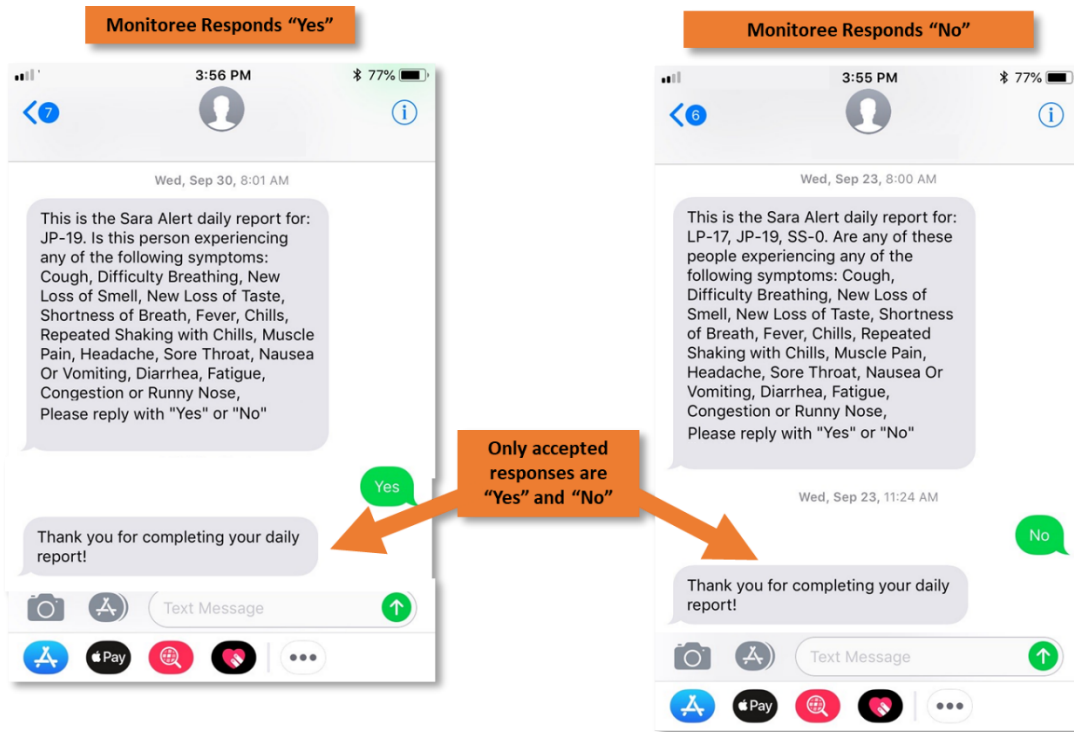


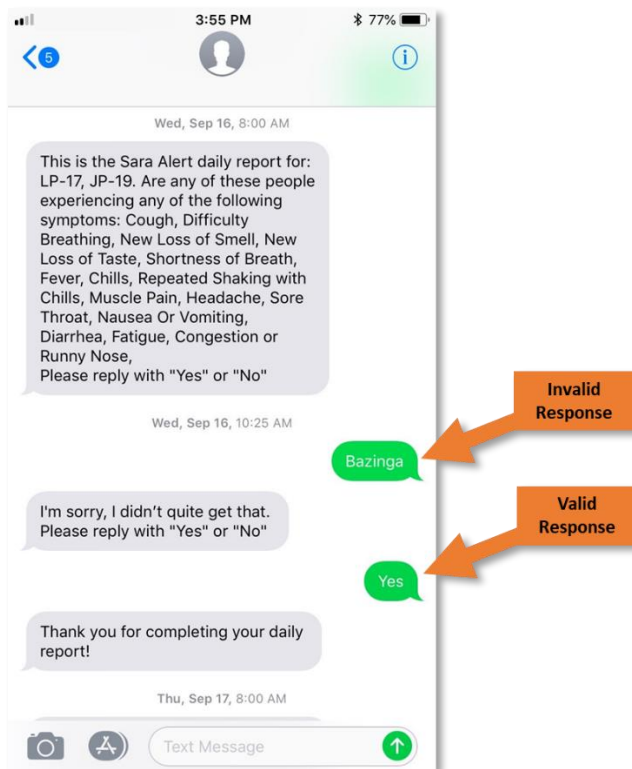
Figure 49: Example daily symptom request text messages sent to monitorees

1) Monitorees respond directly to the message with either “Yes” or “No.”



**Figure 50: Valid responses to SMS-Text self reports**

2) If a monitoree gives an invalid response, they will be prompted again:



**Figure 51: Invalid responses prompt a follow-up**

3) If the monitoree continues to provide invalid responses and reaches the maximum number of daily report SMS response retries (4 attempts), the system will inform them they were unable to record a response.

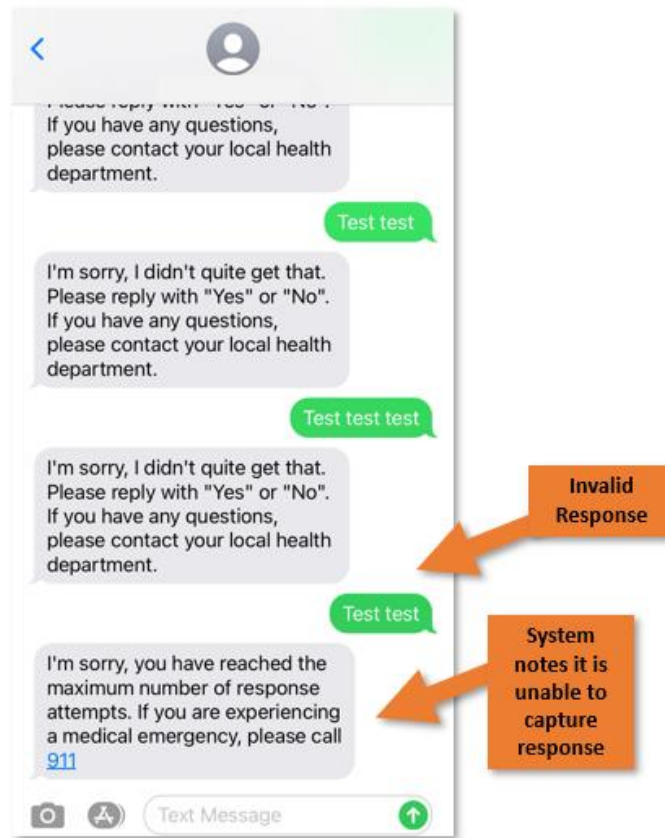


Figure 52: System notes if the monitoree reaches the maximum number of invalid retries

### 6.3.4 Telephone Call

Monitorees who report via Telephone Call will engage in a conversation with “Sara” an automated operator. “Sara” will first introduce herself and identify the monitorees by initials and age:

*“Hello, this is Sara, the automated public health assistant calling for your daily report. This is the report for:”* [The voice will then list out the monitoree initials and ages]

- **Single reporter (example):** *“Hello, this is Sara, the automated public health assistant calling for your daily report. This is the report for: AB, age 29”*
- **Household (example):** *“Hello, this is Sara, the automated public health assistant calling for your daily report. This is the report for: AB, age 29; JB, age 22”*

“Sara” will then list off the symptoms from the case definition:

*“Is this person [or, for households, “Are any of these people”] experiencing any of the following symptoms: chills, congestion or runny nose, cough, diarrhea, difficulty*

*breathing, fatigue, fever, headache, muscle pain, nausea or vomiting, new loss of smell, new loss of taste, repeated shaking with chills, shortness of breath, sore throat*

After “Sara” has completed listing the symptoms, she will say:

*“Please reply with ‘Yes’ or ‘No’”*

At this point the monitoree should respond with either:

- “Yes”—indicating the presence of ANY symptoms that were listed in ANY of the individuals who are being monitored
- “No”—indicating the absence of ALL symptoms in ALL individuals being monitored

If the monitoree responds with “Yes” or “No”, “Sara” will reply with:

*“Thank you for completing your daily report! Goodbye.”*

If the monitoree gives **any other response**, “Sara” will prompt the monitoree for another response:

*“I’m sorry, I didn’t quite get that. Let’s try again.”*

After four incorrect responses in a single contact attempt, the system will respond with the following message:

*“I’m sorry, you’ve reached the maximum number of response attempts. If you are experiencing a medical emergency, please call 911”*

At this point the monitoree will not be able to submit a symptom report until their next day of monitoring.