

Quick Start Guide (Page 1)

Questions? Contact sarasupport@aimsplatform.com

1 Which user types can view Isolation Monitoring dashboard?



Public Health User



Public Health Enroller



Contact Tracer



Super User

2 What data can I access? What actions can I take?

Data Access

- Monitorees associated with your assigned jurisdiction

Actions

- Toggle between Exposure and Isolation Monitoring Workflows
- View monitoring line lists in your assigned jurisdiction
- Modify/view record details of monitorees in jurisdiction
- Manage monitorees:
 - Move case between line lists, view/add/modify daily reports, add comments, document lab results, transfer case to another jurisdiction, end isolation monitoring
- View and export analytics summary for your jurisdiction
- Batch import new cases
- Export case records
- Create and modify reporting households
- Add a list of close contacts for a specific case
 - *Public Health Enrollers, Contact Tracers, and Super Users* can complete enrollment of close contacts for monitoring

3 What does it mean if a record is on a specific line list?

Monitorees will appear on a line list if they meet criteria for that list. Regardless of status, all monitorees will appear on "All Cases."



COVID-19 Recovery Definitions

A monitoree will appear on the **Records Requiring Review** line list if any of the following criteria is met:

- At least 10 days since onset of symptoms AND 24 hours since resolution of fever without fever-reducing medication
- At least 10 days since specimen collection date of first positive lab test and no symptomatic reports
- Two negative lab results AND at least 24 hours since last report of fever without fever-reducing medication

Records Requiring Review	Non-Reporting	Reporting	All Cases
<p>Criteria: Have preliminarily met a recovery definition and require review by a public health user (once confirmed, user can move monitoree record to closed).</p> <p>Daily Notifications Sent? Yes, if eligible.</p>	<p>Criteria: Have not reported monitoring observations within expected time period (e.g., 24 hours for COVID) and have not met a recovery definition. Requires public health follow-up.</p> <p>Daily Notifications Sent? Yes, if eligible.</p>	<p>Criteria: Have reported (either symptoms or no symptoms) within expected time period and have not met a recovery definition.</p> <p>Daily Notifications Sent? Yes, if eligible.</p>	<p>Criteria: Lists cases across all line lists in the Isolation workflow. The status column shows which line list a record is on.</p> <p>Daily Notifications Sent? Depends on which monitoring line list record is on</p>
Closed	Transferred In	Transferred Out	
<p>Criteria: No longer being monitored. Sara Alert does not automatically close records in the isolation workflow.</p> <p>Daily Notifications Sent? No, unless eligible as Head of Household.</p>	<p>Criteria: Has been transferred in from another jurisdiction within the last 24 hours. Will show on the appropriate line list (e.g., Reporting Non-Reporting, etc.) depending upon record values, until closed or transferred out.</p> <p>Daily Notifications Sent? Depends on which monitoring line list record is on</p>	<p>Criteria: Has been transferred to another jurisdiction. Originating jurisdiction will no longer have access to record details. Will remain on this line list for 14 days and will not appear on any other line lists for the originating jurisdiction.</p> <p>Daily Notifications Sent? N/A</p>	

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>Some user roles</i> can enroll close contacts as monitorees by clicking "Enroll" under "Actions"