

User Guide for Enrollers

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1 ABOUT SARA ALERT™

Sara Alert[™] is a standards-based, open source tool that automates the process of public health monitoring and reporting of individuals exposed to or infected with COVID-19 or any infectious disease. It was developed by public health experts for public health. Sara Alert is available in the public domain, free of charge, to public health agencies. As an open source tool, Sara Alert is available for public and private use and is easily integrated into other tools.

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 AlertTM 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 AlertTM Workflow Summary

Visit <u>saraalert.org</u> 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 <u>sarasupport@aimsplatform.com</u>.

2 ENROLLER ROLE OVERVIEW

As an enroller, you can add new people (called monitorees) into Sara AlertTM. These people need public health monitoring because they've been exposed to or have a disease that requires monitoring (e.g. COVID-19). You can enroll monitorees into either the Exposure or Isolation workflow.

As an enroller:

- You have access to records that you entered into the system.
- You can view or change only information that was entered when you enrolled a monitoree. You cannot view daily report information submitted by monitorees, public health actions, or comments made by other Sara AlertTM users.

When you enroll a monitoree, the system checks to make sure that you haven't already enrolled this person. It checks the records that you've entered to make sure the monitoree isn't in the system more than once.

2.1 Enroller Capabilities

As an enroller, you can:

- Enroll a new monitoree into the Exposure workflow
- Enroll a new case into the Isolation workflow
- Assign a monitoree's record to another jurisdiction that you have access to. For example, if you're a state-level enroller, you can can assign cases to a county jurisdiction in your state. When enrolling, your assigned jurisdiction is the default that is assigned to the record.
- View enrollment details of the monitorees you enroll
- Change enrollment details of the monitorees you enroll
- View summary information about monitorees you enroll

TIP: See the <u>Quick Start Guide</u> <u>for Enrollers</u>

3 GETTING STARTED

3.1 Logging In

1) Open Sara Alert[™] in a web browser. Browsers that work with Sara Alert are Chrome, Microsoft Edge, Microsoft Internet Explorer 11, Mozilla Firefox, and Safari. If you're using Internet Explorer 11, you may need to turn off compatibility mode.

2) Log in with your email address and password.

If this is your *first time to log in*, use the temporary password you received in the email from Sara Alert. The system will ask you to change it to something you can remember on your own. Temporary passwords **expire after 72 hours**. If your temporary password has expired, contact your jurisdiction administrator to reset it.

Sara A Secure monitoring and rep	
Log In	
Email	
enroller1@example.com	
Password	
123456ab	୕
	Log In

Figure 3: Log In screen

3) Register for 2-Factor Authentication (2FA) by entering your cell or landline phone number. **This is only required the first time you use Sara AlertTM.** This is how you receive your 7-digit 2FA token number. Enter your phone number and country and click "**Register.**"



Figure 4: Enter your phone number.

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TIP: If you are having trouble logging

paste.

in with the temporary password,

type it in instead of using cut and

4) After your first log-in, the system asks you how you want to receive the 2FA token number. You can receive it by SMS Text or by an automated phone call. Do not select the SMS text option if your 2FA phone number is a landline.

- Choose how you want to receive the 2FA token number.
- Enter the token number you receive and click "Submit."



Figure 5: Choose your 2FA method.

5) After you enter your 2FA token, the system takes you to the Enrollment Dashboard.

6) You can see your username and user role in the upper right-hand corner of the screen.

Sara Alert v1.16.0	🖽 Enroller Dashboard	Analytics	state1_enroller@exar	mple.com (Enroller)	😯 🕞 Logout
Dashboard				You Jurisdic	tion: USA, State 1
2+Enroll New Monitor	ree	Your username is listed here	You	ır user role is	
Enrolled Monito	rees			isted here	
Show Jurisdiction: A	II ~ II			Assigne	d User: All -

Figure 6: Your Sara AlertTM username and user role

7) You also can see your assigned jurisdiction in the upper right-hand corner of the screen. You can only see monitoree records that you've entered or that you have access to based on your jurisdiction and assigned role.

Sara Alert v1.160	🖽 Enroller Dashboard	條 Analytics	💄 state1_enro	oller@example.com (Enroller)	😯 🕩 Logout
Dashboard	ree	Your juris listed	diction is I here	Your Juris	diction: USA, State 1
Enrolled Monito	rees				
Show Jurisdiction: A	IIA ~ II	v		Assig	ned User: All

Figure 7: Your Sara Alert[™] jurisdiction

8) Click the "**Help**" (?) button for links to the User Guide, User Forum, and other helpful resources, including how to contact the Sara Alert[™] team for help.

Sara Alert v1.16.0	📰 Enroller Dashboard	Analytics	state1_enroller@example.com	(Enroller) 3 🔂 Logout
Dashboard				ar Jurisdiction: USA, State 1
2+ Enroll New Monito	pree		Click to view documentation or to	
Enrolled Monito	orees		contact Sara Alert support	
Show Jurisdiction:	All - All	v		Assigned User: All

Figure 8: Access to Sara AlertTM resources

9) To end the session, click "Logout." Be sure to log out of the system when you're not using it.

Sara Alert v1.16.0	Enroller Dashboard	Analytics	💄 state1_enroller@example.com (Enroller) 😨 🔂 Logout
Dashboard			Your Jurise Jun: USA, State 1
2+ Enroll New Monito	ree		Click to log out
Enrolled Monito	prees		
Show Jurisdiction: A	IIA - II	v	Assigned User: All -

Figure 9: The logout button

4 MONITOREE DETAILS AND ENROLLMENT WIZARD

The Enrollment Wizard is a set of six screens that allow you to enter information about a monitoree in a step-by-step process.

You can watch a video tutorial about entering monitoree information at: <u>saraalert.org/public-health/tutorial-videos/</u>

Use the Enrollment Wizard to you enter the following information about a monitoree:

4.1 Monitoree Identification

- The workflow for your monitoree—either Exposure workflow or Isolation workflow.
- The monitoree's name and demographic information, as well as any state/local/federal identification (ID) numbers
- Primary and secondary languages spoken by the monitoree. The primary language is the language the system will use, if supported, in daily communication with the monitoree.
 - Languages are organized in the drop-down, with languages that are supported for automated daily reporting at the top of the list.
 - Unsupported languages are listed below supported languages. Languages that are not fully supported are also designated with an asterisk (*). If you select a language that is 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 this is the same as the home address, select "**Copy from Home Address**."
- Home Address Outside USA (Non-Residents)
 - Address at Destination in USA Where Monitored: Enter information for monitorees who are temporarily staying in the U.S. during their monitoring period.

4.3 Monitoree Contact Information

- "**Preferred Reporting Method**" indicates how monitorees receive notifications to submit daily reports (by email, text, or voice call).
 - Some fields are required, depending on the selected "Preferred Reporting Method."
 - Message and data rates may apply depending on the contact method.
 - If you don't know the monitoree's preferred reporting method, select Unknown, and the monitoree will not receive notifications. This is the system default value.
 - If the monitoree is enrolled in the system but has asked not to receive notifications, select **Opt-Out** for the preferred reporting method, and the monitoree will not receive notifications.
 - If you try to enter a phone number that is blocking Sara AlertTM texts, you'll see a warning message in the monitoree's record. See **page 28** for more details.

NOTE: If the monitoree's **Preferred Reporting Method** and corresponding contact information (**phone number or email address**) matches another record that you have access to, the system links the two records as a reporting household. See **page 22** for instructions on how to remove a record from a household.

- **Preferred Contact Time** is the time of day that the monitoree wants to receive daily report reminders.
 - Morning is from 8:00 AM to 12:00 noon in the local time zone.
 - Afternoon is from 12:00 noon and 4:00 PM in the local time zone.
 - Evening is from 4:00 PM and 8:00 PM in the local time zone.

The local time zone is based on the capital of the monitoree's state entered on the "Monitoree Address" screen. If the state field is blank, the Eastern Time Zone is used.

TIP: See the <u>Quick Start Guide for</u> <u>Preferred Reporting Method</u>

TIP: If **"Unknown"** or **"Opt-Out"** is the selected, update the reporting method (email, text, or phone) to start daily messages to the monitoree.

TIP: If you don't enter a "Preferred Contact Time," the system sends daily requests in the "Afternoon" contact time.

4.4 Monitoree Arrival Information

Fields on this screen are optional because a monitoree may not have travel history. If travel history is available, enter it on this screen.

4.5 Additional Planned Travel

Fields on this screen are optional because a monitoree may not be planning travel during their monitoring period.

4.6 Monitoree Potential Exposure or Case Information

Some fields on this screen are based on the monitoree's workflow (Exposure or Isolation) that you entered on the first screen. These are described below.

4.6.1 Exposure Workflow

- Last Date of Exposure: The system uses this date to figure out the monitoring period for monitorees in the exposure workflow. The field automatically fills (auto-populated) with the Last Date of Exposure that you entered when you created the monitoree's record.
 - You can enter a date that is up to 30 days after the current date. You might use a future date if the monitoree is currently being exposed to a case and you want to input the date when the case will no longer be contagious.
 - You can either enter a Last Date of Exposure or you can turn on Continuous Exposure. This lets the system know whether the monitoring period should be calculated from the Last Date of Exposure (if known)or if the period should be extended because of an ongoing exposure.
- **Continuous Exposure:** Turn this "ON" when the monitoree is being continuously exposed. For example, it's a continuous exposure if the monitoree lives with, and is unable to socially distance from, someone who has a confirmed case of COVID-19.
 - When Continuous Exposure is turned "ON," Sara Alert extends the monitoring period until **either:**
 - The record is closed. In this case, Continuous Exposure is automatically turned off.
 - A user turns off Continuous Exposure and enter a Last Date of Exposure for the monitoree. Once a Last Date of Exposure is entered, the system calculates the end of the monitoring period. Fo COVID-19, the monitoring period ends 14 days after the Last Date of Exposure.
 - You can either enter a Last Date of Exposure or you can turn on Continuous Exposure. This lets the system know whether the monitoring period should be calculated from the Last Date of Exposure (if known)or if the period should be extended because of an ongoing exposure.

- **Exposure Risk Factors**: Use this field if a monitoree has a specific risk factor, like working as healthcare personnel, traveling from an affected country or area, or is a close contact of a known case etc.
 - Some exposure risk factors have text fields where you can enter specific exposures.
 - If a monitoree has more than one exposure to a specific risk factor, use commas to separate them. For example: The monitoree visited more than one healthcare facility with known cases so you enter "Hospital 1, Hospital 2" in the text field.
 - Use the **Member of Common Exposure Cohort** field to add different types of shared exposures, like an outbreak at a workplace, a school, an event.

4.6.2 Isolation Workflow

- Users must provide evidence for the monitoree being a case by entering either a Symptom Onset Date or a positive lab result with a Specimen Collection Date (or both).
 - **Symptom Onset Date** may be used by the system to determine eligibility for a record to appear on the Records Requiring Review line list. For COVID-19, this field is used to determine if the *non-test-based* recovery definition has been met.
 - You can enter a date up to 30 days after the current date. This allows users to lengthen the isolation monitoring period when needed, like for monitorees who are immunocompromised.
 - A positive **Lab Result** with a Specimen Collection Date may be used by the system to determine eligibility for a record to appear on the Records Requiring Review line list in the Isolation Workflow. For COVID-19, this field is used to determine if the *asymptomatic non-test-based* recovery definition has been met.
- **Case Status** is either "Confirmed" or "Probable."
 - Use guidelines given to you by your jurisdiction to assign Case Status. You can see the latest case definitions from the Council of State and Territorial Epidemiologists (CSTE) at: <u>https://www.cste.org/page/PositionStatements</u>.

4.6.3 Both Workflows

- You can update the **Assigned Jurisdiction** field when you enroll a monitoree or in their record.
 - The monitoree's default jurisdiction matches your assigned jurisdiction displayed in the upper right-hand corner of your screen.
 - The list of available jurisdictions for the monitoree includes only jurisdictions that you have access to. For example, if you're a state enroller, you can assign cases to a jurisdiction within state.
 - If you need to transfer a record to a jurisdiction that you don't have access to, you need a Public Health user, Public Health Enroller, or Super User to transfer the record after enrollment.
- The **Assigned User** number field is optional and can be updated later. It might identify the user or group within a jurisdiction that's responsible for monitoring an individual.

- Each jurisdiction uses Assigned User in their own way. For example, they may assign a user number to each user, assign a user number to groups or teams, or assign a user number to call center stations. Make sure you understand how your jurisdiction uses this field.
- This field does not change who can see or change a record. Its purpose is to to help jurisdictions identify which of their public health staff or volunteers is assigned to monitor a case or contact.

5 ENROLLER CAPABILITIES

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

1) Click the "Enroll New Monitoree" button.

Sara Alert v1.16.0 🖽 Enrolle	er Dashboard 🔅 Analytics	💄 state1_enroller@example.com (Enroller) 🥑 🔂 Logout
Dashboard		Your Jurisdiction: USA, State 1
At Enroll New Monitoree	Click to add a new monitoree	
Enrolled Monitorees		
Show Jurisdiction: All	- All -	Assigned User: All -

Figure 10: Enroll new monitoree

2) Select the monitoree workflow.

- **Exposure (contact):** Use this workflow if the monitoree is potentially exposed.
- Isolation (case): Use this workflow if the monitoree is a confirmed case.

Monitoree Identification		
WORKFLOW *		
Exposure (contact)		~
Exposure (contact)		
Isolation (case)		

Figure 11: Select Exposure or Isolation workflow

ENROLLER CAPABILITIES

3) Enter information on the enrollment screens. To advance, click "**Next**." To return to a previous screen, click "**Previous**." Required fields have an asterisk (*). You must complete these fields or you can't advance through the enrollment process.

Monitoree Identification						
WORKFLOW *						
Exposure (contact)						~
FIRST NAME *		MIDDLE NAME(S)			LAST NAME *	
Donald					Duck	
DATE OF BIRTH *	AGE		SEX AT BIRTH 😧			
01/01/1970	51		~			
GENDER IDENTITY			SEXUAL ORIENTATIO	ON 🕜		
		~		~		
RACE (SELECT ALL THAT APPLY)	ETHNICITY					
O WHITE			~			
BLACK OR AFRICAN AMERICAN						
NATIVE HAWAIIAN OR OTHER PACIFIC ISLANDER	2					
□ OTHER						
UNKNOWN						
REFUSED TO ANSWER						
LANGUAGE Languages that are not fully supported are indicated	d by a (*) in the b	elow list.				
PRIMARY LANGUAGE			SECONDAR	RY LANGUAGE 🔞		
		~				~
INTERPRETATION REQUIRED				Click	« "Next" to	
NATIONALITY				advan	ce to the next	
				:	section	
STATE/LOCAL ID		CDC ID			NNDSS LOC. REC. ID/CASE ID	
						Next

Figure 12: Enter new monitoree enrollment information

- 4) Review the enrollment information 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 you select "Finish." If you move out of the Enrollment Wizard before selecting "Finish" the record is not saved.



Figure 13: Click "Finish" to save the record

5) Sara AlertTM identifies potential duplicates based on one of these:

- An exact match of First Name, Last Name, Sex at Birth, and Date of Birth
- Or an exact match of the State/Local ID .

If the record is flagged as a possible duplicate, you get a message that tells you there's a match and asks if you want to continue to create a record that may already be enrolled in the system. Sara Alert checks for potential duplicates in the records that you have access to. This means that the system checks to see if you've already created a record that matches the record you're enrolling. The system doesn't check for matches to records enrolled by other users.



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

5.2 How to Search for a Monitoree Record

You can search for monitoree records that you've already enrolled so you can add new information or change information. You only have access to records that you created in the system. You can't search for records created by another user.

1) Search for a monitoree on the Enrollment Dashboard. Use the "Search" bar on the dashboard to find records that match:

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

Dashboard					You	r Jurisdiction: USA, State
+ Enroll New Monitoree						
Enrolled Monitorees						C.
Show Jurisdiction: All	- All -					Assigned User: All
Show 15 - entries					Search:	ber ×
Monitoree 1	Jurisdiction	Assigned User	State/Local ID	Sex 11	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 Manle94	State 2	9694		Female	12/17/2004	10/29/2020

Figure 15: Search enroller dashboard

2) You can also filter monitorees that you have enrolled by their Jurisdiction or their Assigned User number.

Dashboard					You	r Jurisdiction: USA, Sta	ate 1
+ Enroll New Monitoree							
Enrolled Monitorees							
Show Jurisdiction: All	- All -					Assigned User: All	
Show 15 - entries					Search:	ber	×
Monitoree 1	Jurisdiction 11	Assigned User	State/Local ID	Sex 11	Date of Birth	Enrollment Date	t1
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 Manle94	State 2	9694		Female	12/17/2004	10/29/2020	

Figure 16: Filter by jurisdiction or assigned user

5.3 How to Edit Monitoree Enrollment Information

You can change information in monitoree records that you created. You can add new information or correct errors.

1) To open a record, click on the monitoree's name in the "Monitoree" column.

Dashboard							You	r Jurisdiction: USA, State
+ Enroll New Monitoree								
Enrolled Monitorees								
Show Jurisdiction: All Show 15 - entries		- All	*				Search:	Assigned User: All -
Monitoree	t.	Jurisdiction	11	Assigned User	State/Local ID	Sex 11	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 Manle94		State 2		9694		Female	12/17/2004	10/29/2020

Figure 17: Select monitoree record

2) On the "Monitoree Details" screen, click "Edit" next to the section you want to update (like contact information, address, or travel information). You may need to first click "show address, travel, exposure, and case information" to expand the screen to show the "Edit" buttons for those sections.

		CI	ick "Edit" to edit that section	
Peter Airport Ho	H		Assigned Jurisdictio. Assigned User:	ISA, State 49
IDENTIFICATION		Edit CO	INTACT INFORMATION	Edit
DOB: 01/01/2000	Birth Sex:	Pho	one: 555-555-5555	
Age: 21	Gender Identity: Male (Identifies as n	nale) Pre	ferred Contact Time: Afternoon	
Language: English	Sexual Orientation:	Pri	mary Telephone Type: Landline	
Sara Alert ID: 6612	Race: White	Em	ail:	
State/Local ID: 12345	Ethnicity:		n	
CDC ID:	Nationality: If the	e section you	need to edit is hidden,	
NNDSS ID:		vou may nee	d to click here first	

Figure 18: Modify monitoree record

5.4 How to Create a Reporting Household During Enrollment

Sara Alert allows a group of monitorees to **report symptoms as a single household unit called a "Household."** If they choose to do this, the system links their records and contacts only the person chosen as Head of Household (HoH). The HoH agrees to report daily symptom information for all monitorees in the Household. If **Tip:** A reporting household means that more than one person has the same phone number or email address. See the <u>Quick Start Guide</u> for Household Reporting.

the record of the HoH is closed for any reason, this person continues to receive daily report reminders for the other eligible monitorees in the Household. If the HoH no longer wants to report for household members, update the HoH (see **page 19**) in the system.

Here's how to create reporting households in the Enrollment Wizard:

1) Enroll the HoH as you would a monitoree (see page 11).

NOTE: The system automatically makes the first Household member enrolled the HoH. You can change this later using the "Change Head of Household" button.

2) On the "Monitoree Review" screen, select "**Finish and Add a Household Member.**" This saves the HoH record and lets you enroll another member of the Household. The HOH receives reminders and completes daily reports for all the monitorees enrolled in the Household.



Figure 19: Create a reporting household during enrollment

3) Click "Continue" to confirm that you want to enroll other Household members.



Figure 20: Note how Sara Alert[™] handles household enrollment

NOTE: If a Household member wants to submit daily reports on their own, enroll that person individually and not as a member of the Household. If this happens, the monitoree **must provide**

unique contact information—**a** phone number or email address. This lets the system know for sure which reports go with each monitoree.

4) The system automatically fills the enrollment screens for each Household member with the same address, contact information, arrival information, additional planned travel, and potential exposure information as the HoH. If any of this information is different for a Household member, you can change it. To do this, you can make the change on each enrollment screen or click the relevant "Edit" on the **Monitoree Review Screen**.

Tip: You may need to edit exposure information, including Last Date of Exposure, for monitorees exposed through a Household member.

NOTE: Even if you change a Household member's contact information so that it's not the same as the HoH, the HoH still reports for the member unless you remove that person from the reporting household.

Monitoree Details		Field: th	s will pre e HoH's i	-populate wit nformation	h		
Pepperoni Airport						Assigned Jurisdiction: Assigned User: 6478	USA, State 49
IDENTIFICATION			Edit	CONTACT INFORMA	TION		Ed
DOB: 01/01/1976 Age: 45 Language: French Sara Alert ID: 6627 State/Local ID: 12345 CDC ID: 67899 NNDSS ID: 12346	Birth Sex: Male Gender Identity: Male (Identi Sexual Orientation: Race: White, Asian Ethnicity: Not Hispanic or Lat Nationality:	fies as male) ino		Phone: 555-555-5555 Preferred Contact Time: Primary Telephone Type Email: Preferred Reporting Me	Afternoon : Landline thod: Unknown]	
 A Hide address, travel, exposure, and ca ADDRESS 	ase information	Edit	ARRIVAL INF	ORMATION	Edit	ADDITIONAL PLANNED TRAVEL	Ed
HOME ADDRESS (USA) Address 1: example Address 2: Town/City: example State: Colorado Zip: 55555 County:	MONITORING ADDRESS Address 1: example Address 2: Town/City: example State: Colorado Zip: 55555 County:		DEPARTED Port of Origin: Date of Depart 03/22/2021 Carrier: himself Flight or Vessel	ARRIVAL London Port of Ent ure: Date of Arr	ry: ival: 03/22/2021	Type: Domestic Place: Illinois Port of Departure: Start Date: 05/12/2021 End Date: NOTES	
POTENTIAL EXPOSURE INFORM	IATION	Edit	NOTES			Edit	
Last Date of Exposure: 03/30/2021 Exposure Location: Exposure Country: Algeria			UG screenshot				
RISK FACTORS Close Contact with a Known Cas 865 Member of a Common Exposure Was in Healthcare Facility with N UG Hospital	e c Cohort Known Cases						
The reporting responsibility for this mor	nitoree is handled by Peter Airport 🕨	н					

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

5) To enroll more Household members, click "**Finish and Add Household Member**" at the bottom of the **Monitoree Review** screen. Repeat steps 3-5 for all remaining Household members.

6) After enrolling the last Household member, click "**Finish**" at the bottom of the **Enrollment Review** screen.

POTENTIAL EXPOSURE INFORMATION	Edit NOTE	s	Edit	1
Last Date of Exposure: 10/19/2020 Exposure Location: West Vesta Exposure Country: Northern Mariana Islands RISK FACTORS	sdgsdfa	agdasfdddd	Click to save the add stop enrol household me	record and ling new embers
 Member of a Common Exposure Cohort Match 				
Previous Finish and Add a He	ousehold Member	Finish	Cancel	

Figure 22: Click "Finish" when all household members have been enrolled.

7) You can view Household members and their workflow, monitoring status, and continuing exposure status on any Household member's record.

Flynn white He	ы				Assigned Jurisdiction: USA, State 1 Assigned User: 5925
IDENTIFICATION			Edit	CONTACT INFORMATION	l Edi
DOB: 09/09/1976 Age: 44 Language: Sara Alert ID: 965 State/Local ID: CDC ID: NNDSS ID: 999999 V Show address, travel, exp This monitoree is responsib	Birth Sex: Un Gender Ident Sexual Orien Race: Ethnicity: Nationality: - posure, and case information ble for handling the reporting	known i ty: t ation: of the following other monitoree	If a m the listing	Phone: 555-5555 Preferred Contact Time: Primary Telephone Type: Email: Donitoree is in a House ir record contains a tal g other Household men	hold, ble nbers
Name	Workflow	Monitoring Status		Continuous Exposu	ire?
Gold, Rose	Isolation	Actively Monitoring		No	
		the second se			

Figure 23: If a monitoree is in a Household, their record contains a table listing other Household members

5.5 How to Change a Head of Household

You can change a HoH as long as you enrolled that person into the system. You only have access to records of monitorees and Households that you enter.

1) To change an HoH, open the HoH's record. Click the "Change Head of Household" button.

his monitoree is respon	sible for handl C	lick here to change which ^{es:}		
Name	We hou	usehold member is Head of	Continuous Exposure?	
Badger, Bucky	Exp	Household	No	
White, Holly	posure	Actively Monitoring	No	

Figure 24: Click "Change Head of Household"

2) In the dropdown list, select the person you want to make the HoH. The drop-down list includes only individuals in the Household. The individual you select becomes the new HoH and is responsible for reporting for all Household members.

Select The New Head Of Household Note: The selected monitoree will become the responder for the current monitoree and all others within the list	
~ Badger, Bucky	

Figure 25: Select the preferred Head of Household

NOTE: The drop-down list includes only names of monitorees that you created and have access to.

3) Click "Update" to save the new HoH.

Select The New Head Of Household	
Note: The selected monitoree will become the responder for the list	r the current monitoree and all others within
Badger, Bucky	~

Figure 26: Click Update to save the Head of Household

5.6 How to Enroll a New Household Member into an Existing Household

1) Open one of these records:

- To enroll a new monitoree into an existing Household, open the record of the HoH.
- To enroll a new monitoree with an existing monitoree and the existing monitoree will be the the HoH, open the existing monitoree's record. The existing monitoree becomes the HoH when the new monitoree is enrolled.

2) On the Monitoree Details screen, click "Enroll Household Member."

Berry Wine		A:	ssigned Jurisdiction: USA, State 10 ssigned User:
IDENTIFICATION	Edit	CONTACT INFORMATIO	ON Edit
DOB: 11/12/1949	Birth Sex: Female	Phone:	
Age:	Gender Identity:	Preferred Contact Time:	
Language: Spanish	Sexual Orientation:	Primary Telephone Type:	
Sara Alert ID: 152	Race:	Email:	
State/Local ID:	Ethnicity: Hispanic or Latino	Preferred Reporting Metho	d:
CDC ID:	Nationality:		
NNDSS ID:	Click to enroll a new mon current monitoree as Hea	itoree with the d of Household	
 Show address, travel, expos 	ure, and case information		
This monitoree is not a memb	er of a household.		

Figure 27: Select "Finish and Add a Household Member" to add new household member

3) Complete enrollment as described in steps 4-7 of **How to Create a Reporting Household** on **page 16.**

5.7 How to Move an Existing Record into a Reporting Household

Use the **"Move to Household"** function to create Households from existing records in the system. You can add a record to an existing household or create a new household from two records.

1) Open the monitoree record and click the "Move to Household" button.

Berry Wine				Assigned Jurisdiction: U Assigned User:	JSA, State 10
IDENTIFICATION		Edit	CONTACT INFORM	IATION	Edi
DOB: 11/12/1949	Birth Sex: Female		Phone:		
Age:	Gender Identity:		Preferred Contact Tim	e:	
Language: Spanish	Sexual Orientation:		Primary Telephone Typ	pe:	
Sara Alert ID: 152	Race:		Email:		
State/Local ID:	Ethnicity: Hispanic or Latino		Preferred Reporting N	lethod:	
CDC ID:	Nationality				
NNDSS ID:	Click to add this				
Show address, trave mo	nitoree to a household				
This manifest I a man	her of a household				

Figure 28: Click "Move to Household"

2) The **"Move to Household"** screen includes a list of all monitorees in both workflows who are reporters. They can be an HoH and report for everyone in their Household, or they can report just for themselves (self-reporters).

- Use the "Search" bar to find monitorees that match any of these search terms:
 - First Name
 - o Last Name
 - Date of Birth (format: YYYY-MM-DD)
 - o State/Local ID
 - NNDSS/Case ID Your jurisdiction may be using this to document a monitoree's National Notifiable Diseases Surveillance System (NNDSS) ID number.
 - CDC ID Your jurisdiction may be using this field to document an ID number assigned by the Centers for Disease Control and Prevention (CDC).
- You can sort columns the same way as on the Enroller Dashboard.
- You can change the number of monitorees shown on a screen and navigate the screens in the same way as on the Enroller Dashboard.

NOTE: The list shows only names of monitorees that you have access to. This means only the records that you created.

Please select the new monitoree th You may select from the provided selected monitoree's household.	existing Heal Search for a mo name, ID, o	nitoree by self rep r DOB	orting. Testudo Terrapin will be	immediately moved into the
Q Search				
Monitoree	State/Local ID	Jurisdiction	Date of Birth	\$
Terrapin, Testudo		USA	2001-01-01	Select
TEst, Test Exposre	Click to	sort that	1950-01-01	Select
HistoryNotifs, Testing	нон	Jmn	1990-01-01	Select
HistoryNotifs3, Testing		USA	2010-01-05	Select
Test1r110, Test1		USA	1990-03-08	Select
I≣ Show 5 → Displa	ying 5 out of 4704 rows.		Previous 1 2 3	4 5 941 Next
Ca	n display up to 10	Click to navigate	to	·····

Figure 29: Search for monitorees the same way as in the Monitoring Dashboards.

3) Click "**Select**" to add the monitoree to the selected monitoree's Household. This makes that selected monitoree the HoH.

You may select from the provided exist ou may select from the provided exist elected monitoree's household.	sting Head of Households and n	nn. nonitorees who are self repo	orting. Testudo Terrapin will be im	mediately moved into the
Q Search				
Monitoree	State/Local ID	Jurisdiction	Date of Birth	\$
Terrapin, Testudo		USA	2001-01-01	Select
TEst, Test Exposre		USA Clin	ck to add the ent monitoree	Select
HistoryNotifs, Testing	НоН	USA	1990-01-01	Select
HistoryNotifs3, Testing		USA	2010-01-05	Select
Test1r110, Test1		USA	1990-03-08	Select
I≡ Show 5 ✓ Displayin	g 5 out of 4704 rows.		Previous 1 2 3	4 5 941 Next

Figure 30: Click "Select" to move the monitoree into the selected Household.

4) The selected HOH makes daily symptom reports for the monitoree, and the monitoree appears in HoH's Household.

Monitoree De	tails									
Pinkman J	lesse								Assigned Jurisdictio Assigned User:	n:
IDENTIFICATIO	ON					Edit	CONTACT INF	ORMATION	I	Edit
DOB: 01/01/1990 Age: 30 Language: Sara Alert ID: 10: CDC ID: NNDSS ID: V Show address, This monitoree is	05 travel, ex a membe	Birth Se: Gender I Sexual C Race: Ethnicity National posure, and case infi	: dentit rienta : ity: ormatio	y: ition: on	reporti	ng responsibili	Phone: Preferred Contac Primary Telepho Email: newemail@ Preferred Report	tt Time: ne Type: Dexample.com ing Method: designated He	Opt-out ead of Household:	
Name	\$	Date of Birth	¢	Workflow	\$	Monitoring	Status 🗧	Continuous	Exposure?	\$
Berry, Ron	HoH	01/01/1900		Exposure		Not Monitori	ng	No		
A Remove From H	lousehold	Click the He name to	ead (/iew	of Housel their rec	nold's ord					

Figure 31: The selected HoH is now responsible for reporting on behalf of the monitoree

5.8 How to Remove a Household Member from an Existing Reporting Household

You can't remove a member from a household unless their email and phone number are different from the HoH's.

1) Open the Household member's record. Select "Edit **Details.**" Then select "Edit" for the "Contact Information" section.

Tip: Update the monitoree's contact information **before** you click **"Remove from Household."** If you click **"Remove from Household"** before updating the information, you will get a message asking for the update.

Monitoree Details		Click have to adit the		
Pinkman Jesse		monitoree	monitoree's contact information	
IDENTIFICATION		Edit		Edit
DOB: 01/01/1990 Age: 30 Language: State/Local ID: CDC ID:	Birth Sex: Gender Identity: Sexual Orientation: Race: Ethnicity:		Phone: 999-999-9999 Preferred Contact Time: Primary Telephone Type: Email: example11@example.com Preferred Reporting Method: Opt-c	ut



2) On the Monitoree Information screen, change the monitoree's email and phone number. The monitoree's contact information must be different from the HOH's. Select "Next" and "Finish" to save the changes.

Monitoree Contact Information		
PREFERRED REPORTING METHOD *		
E-mailed Web Link		
PRIMARY TELEPHONE NUMBER		SECONDARY T
+15555555555		
PRIMARY PHONE TYPE		SECONDARY P
	~	
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 to	Ic	
E-MAIL ADDRESS	CONFIRM E-MAIL ADDRESS	
newemail@example.com		

Figure 33: Update phone number and email address.

3) Select "**Remove from Household.**" to remove the monitoree from the Household. This makes the monitoree responsible for their own reporting.

Monitoree Deta	ails								
Pinkman Je	esse							Assigned Jurisdi Assigned User: -	iction:
IDENTIFICATIO	N			Edit	CONTA	CT INFO	ORMATION	I	Edit
DOB: 01/01/1990 Birth Sex: Age: 30 Gender Identity: Language: Sexual Orientation: Sara Alert ID: 1005 Race: State/Local ID: Ethnicity: CDC ID: Nationality: NNDSS ID: Y					Phone: - Preferre Primary Email: ne Preferre	- d Contact Telephon wemail@ d Reporti	: Time: e Type: example.com ng Method: (Opt-out	
This monitoree is a	membe	er of the follo	Click here to remove the	i i	ty is handle	d by the d	designated He	ead of Household:	
Name	\$	Date of Bir	monitoree from the	5	Status	\$	Continuous	Exposure?	\$
Berry, Ron	HoH	01/01/1900	household		ng		No		
A Remove From Ho	usehold								

Figure 34: Select "Remove Household."

5.9 How to View Enroller Analytics

Analytics are the resulting tables and figures after analyzing (study) data and statistics. Sara Alert gives you analytics about enrollment information you enter into the system. Use the "Analytics" button on the Enrollment Dashboard to see:

- "Your Statistics"—This is a summary of enrollment information that **you have entered** into Sara Alert.
- "System Statistics"—This is a summary of all enrollment information in your jurisdiction.

The system updates the information used in the Analytics summary once a day.

Sara Alert v1.16.0	📰 Enroller Dashboard	Analytics	💄 state1_enroller@example.	.com (Enroller) 🝞 🔂 Logout
Dashboard				Your Jurisdiction: USA, State 1
Enroll New Monitor	ee		Click here to view Enroller Analytics	
Enrolled Monito	rees			



6 MONITOREE SELF-REPORTING OVERVIEW

Monitorees are the people you enroll in Sara AlertTM for public health monitoring to help track the spread of diseases like COVID-19. Monitorees in both the exposure and isolation workflow receive daily messages from Sara Alert during their monitoring period (the time they're reporting symptoms).

Tip: See the <u>Quick Start Guide for</u> <u>Preferred Reporting Method</u>

Monitorees don't have their own Sara Alert accounts, so they don't have a username or password. Each day during their monitoring period, the monitoree gets a message asking them to report their symptoms. Remember:

- If the monitoree is a HoH, they report for all the monitorees in their Household
- If the monitoree is a member of a Household, they are not sent reports.

6.1 Monitoree Message Summary by Reporting Method

Table 1 is a summary of messages sent to monitorees by their selected reporting method. If a monitoree's reporting method is marked "Unknown" or "Opt-out", they don't receive Sara AlertTM messages and are not listed in the table.

Kind of Message	E-mailed Web Link	SMS-Texted Weblink	SMS Text Message	Telephone Call
Welcome Message	Sent right after enrollment; includes the first Daily Report Message with a weblink to report symptoms	 Sent right after enrollment; includes: Monitoree initials and age (for example AH-42) A link to the Sara Alert privacy policy 	 Sent right after enrollment; includes: Monitoree initials and age (for example, AH-42) A link to the Sara AlertTM privacy policy 	None sent
Daily Report Message	 First one sent with the Welcome Message; then sent daily Is list of yes/no questions for each symptom Monitoree can submit the report any time. If HoH: The HoH gets one email with a weblink for each member of the Household. Each weblink is labelled by the member's initials and age (for example, AH-42). 	 Sent the day after enrollment and then daily during the monitoree's "Preferred Contact Time" Is a list of yes/no questions for each symptom Monitoree can submit their report any time. If HOH: The HoH gets one text for each member of the Household. Each text is labelled with the member's initials and age (for example, AH-42). The text includes a link to the report. 	 Sent the day after enrollment and then daily during the monitoree's "Preferred Contact Time" Is one yes/no question about all symptoms Monitoree must submit their report within 18 hours of getting the text. If HoH: The HoH gets one text message with one yes/no response for all symptoms for all Household members. 	 Made the day of or the day after enrollment and then daily during the monitoree's "Preferred Contact Time" Is one yes/no question about all symptoms Monitoree must answer the call to submit their report. If HoH: The HoH gets one phone call with one yes/no question for all symptoms for all Household members.

Table 1: Messages Sent to Monitorees

Kind of Message	E-mailed Web Link	SMS-Texted Weblink	SMS Text Message	Telephone Call
Reminder Message (if no daily report received from monitoree)	None sent	None sent	None set	Sent once an hour during the monitoree's "Preferred Contact Time"
When is the "Monitoring Complete" message sent? ¹	Sent if a monitoree is on the Asymptomatic line list (in the Exposure workflow) when the monitoring period ends	Sent if a monitoree is on the Asymptomatic line list (in the Exposure workflow) when the monitoring period ends	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
Daily Report Format	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

6.2 Summary of Messages Sent to Monitorees

6.2.1 Language

Monitorees receive Sara AlertTM messages in the primary language you entered for them during enrollment. Sara Alert isn't available in all languages. Languages are organized in the dropdown, with languages that are supported for automated daily reporting at the top and unsupported languages below. If a language is supported, Sara Alert can send a monitoree's automated reports in that language. If a language isn't available, it also has an asterisk (*) next to it on the enrollment screen, and messages to the monitoree are in English. If the language is supported for only some Preferred Reporting Methods (like Somali, which is only supported for email or text messages), a note appears on the screen with more details.

6.2.2 Welcome Message (Email and SMS Texts only)

Monitorees need to know when to expect the Sara AlertTM Welcome Message so they know the message is real and not fake or a scam. The timing of the Welcome Message depends on the monitoree's preferred reporting method:

- **Emailed Weblink:** Monitorees receive the Sara Alert Welcome Message in an email right after their enrollment is complete. The email includes a link for the monitoree to submit their Daily Report.
- **SMS-Texted Weblink or SMS Text Message:** Monitorees receive the Sara Alert Welcome Message in a text right after their enrollment is complete. The message includes the monitoree's initials and age (for example, AH-42) and a link to the Sara Alert privacy policy.

If you enroll an HoH using Emailed Weblink or SMS-Texted Weblink, the HoH receives:

• A Welcome Message that includes a Daily Report weblink for the HoH

¹ Monitoring Complete text messages are only sent for jurisdictions that choose to opt-into this feature.

• A second message at the "Preferred Contact Time" with links to reports for all enrolled Household members

A monitoree doesn't get a welcome message if:

- They choose **"Telephone Call"** as the reporting method.
- Their preferred reporting method is "Unknown," "Opt-Out," or "Telephone Call" and later updated to Email, SMS-Texted Weblink, or SMS Text Message.

6.2.3 Daily Report Message Timing (Email, SMS Texts, and Phone Call)

Monitorees get a Daily Report Message from Sara AlertTM each day to prompt them to report their symptoms. You can make sure they understand the timing of these messages to help them meet local reporting requirements.

"Afternoon" is the default contact time for Daily Report Messages. So if you don't enter a monitoree's **Preferred Contact Time** during enrollment (you leave the field blank), the monitoree gets the Daily Report Message in the Afternoon contact time.

- Monitorees using Emailed Weblink as their reporting method get their first Daily Report message as part of the Welcome Message. They get all other Daily Report messages at their Preferred Contact Time.
- Monitorees using SMS-Texted Web Link or SMS Text Message as their reporting method get Daily Report messages once a day at their Preferred Contact Time starting the day after enrollment.
 - **EXAMPLE**: If a monitoree enrolls in Sara Alert at 4 pm EST on June 1 but their "Preferred Contact Time" is Morning, they get the Welcome Message shortly after 4 pm EST on June 1 and then Daily Report messages during the Morning contact period starting on June 2.
 - **EXAMPLE**: If a monitoree enrolls in Sara Alert at 4 pm EST on June 1 but their Preferred Contact Time is Evening, they get a Welcome Message shortly after 4 pm EST on June 1 and then Daily Report messages during the Evening contact period starting June 2.
- Monitorees using Telephone Call as their reporting method get a Daily Report message during their Preferred Contact Time. If they are enrolled after their Preferred Contact Time on that day, they will not receive their first message until the next day.
 - **EXAMPLE**: If a monitoree enrolls at 4 pm EST on June 1 but their "Preferred Contact Time" is Morning, they get their Daily Report messages every day during the Morning contact period starting on June 2.
 - **EXAMPLE**: If a monitoree enrolls at 4 pm EST on June 1 but their Preferred Contact Time is Evening, they receive their Daily Report Messages each day during the Evening contact period starting on June 1.

6.2.3.1 Monitoree Time Zone

The "Preferred Contact Time" field is based on a monitoree's address and time zone.

• If the monitoree has a "State" entered in the "Address at Destination in USA Where Monitored" section of the "Monitoree Address" enrollment screen, the system sets the monitoree's time zone to match the state capital's time zone.

- If the state in the "Address at Destination in USA Where Monitored" section of the "Monitoree Address" enrollment screen is blank, the system uses the state entered in the "Home Address Within USA" section. The system sets the monitoree's time zone to match the state capital's time zone.
- If both of the "State" fields are blank, the system sets the monitoree's time zone to US Eastern Time.

6.2.4 Reminder Message (Telephone Only)

Sara Alert sends a reminder message to monitorees who report by Telephone Call.

- The system sends a Reminder Call once an hour during the monitoree's "Preferred Contact Period" until the monitoree submits a report. If the monitoree doesn't respond, the system calls back up to four times.
- If the system doesn't understand the monitoree or the monitoree says something on the call other than **Yes** or **No** the system repeats the prompt a few times before hanging up. If this happens, the system records the monitoree as "non-reporting.

6.2.5 Monitoring Complete Message (Email Only)

If a monitoree does not report any symptoms related to the disease being monitored at the end of the monitoring period, the system sends a message that monitoring is complete. This message goes only to monitorees who have an email address entered in Sara AlertTM.

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

Monitorees can opt-out of Sara AlertTM text messages at any time. They do this by replying "Stop" to any Sara Alert text message. When this happens, the system no longer sends text messages to that phone number. The monitoree can re-start text messages by texting "Start" to the Sara Alert phone number.

- **NOTE:** The system can contact a monitoree by Telephone Call using the same phone number as for texts. If the monitoree opts-out of Sara Alert text messages: "SMS Blocked" appears next to the phone number on the Monitoree Details screen.
- If SMS Text Message is the monitoree's Preferred Contact Method, this message will show in red.

Monitoree Details					
James Holden			Assigned Jurisdicti Assigned User: 324	i on: USA, State 3 13	
IDENTIFICATION	Edit	CONTACT INFORMA	TION	Edit	
DOB: 01/01/1970 Age: 51 Language: English Sara Alert ID: 5820 State/Local ID: 2 3 1	Birth Sex: Gender Identity: Transgender Female (Male-to- Female (MTF) Sexual Orientation: Race: White, Asian, American Indian or Alaska Native	Phone: 555-555-5555 SMS Blocked @ Preferred Contact Time: Afternoon Primary Telephone Type: Email: Preferred Reporting Method: SMS Text-m		Blocked numbers are identified	
NNDSS ID: Show address, travel, exposure	Nationality:			Red text means SMS based reporting meth picked for blocked nun	

Figure 36: The Monitoree Details screen shows if a monitoree has blocked texts from Sara AlertTM

If you enter a phone number for a monitoree who has blocked text messages from Sara Alert, the system displays an "SMS Blocked" message.

PREFERRED REPORTING METHOD		PREFERRED CONTACT TIME
SMS Texted We The system will indicate if a phone number has blocked text messages from Sara Alert	ř	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 JUMBER *	SMS Blocked 😧	SECONDARY TELEPHONE NUMBER
555-555-5555		

Figure 37: On the Monitoree Contact Information screen, SMS Blocked message for a phone number that has opted out Sara AlertTM text messages

6.3 Protecting Monitorees from Text and Email Scams

You can help protect monitorees from phone and email scams by helping them know how to make sure a message is from Sara AlertTM. The Sara Alert website has a fact sheet aimed at monitorees, which explains what to expect when being contacted by Sara Alert. See <u>How Sara</u> <u>Alert Works: Protecting Your Information</u>. The fact sheet includes the phone number that the APHL-hosted version of Sara Alert uses to contact monitorees, as well as a description of how to identify if a message is really from Sara Alert.

Remember, Sara Alert will NEVER:

- Ask for a monitoree's:
 - o Social Security number
 - Bank account or credit card numbers
 - o Passwords or answers to security questions
- Threaten a monitoree
- Ask a monitoree to pay for anything

NOTE: Sara Alert is able to send notifications to monitorees in several languages (see page 26).

6.4 Submitting Daily Reports to Sara Alert™

This section contains contains descriptions and screenshots of how monitorees submit Daily Reports using each of the four Preferred Reporting Methods. Tip: See the <u>Quick Start</u> <u>Guide for Helping</u> <u>Monitorees with Daily</u> <u>Reports</u>

6.4.1 E-mailed Web Link

Monitorees who report their symptoms by E-Mailed Web Link get an email from Sara AlertTM each day that includes a link to the Daily Report. If the monitoree is sent to a HoH, the email includes a link for each monitoree in the Household. The monitoree's age and initials appear at the end of each weblink and at the top of the Daily Report.

NOTE: Exact formatting may vary depending on the email client the monitoree uses. A jurisdiction's contact information will only appear if they have provided it to Sara Alert.



Figure 38: Example Daily Report message emails

To submit their Daily Report:

1) Monitorees click on the **Daily Report** link in the email.



Figure 39: Example Daily Report Message email

- 2) The monitoree's Daily Report opens in a browser window.
 - If the monitoree has any symptoms, they check all they are experiencing in the symptom list.
 - If the monitoree has no symptoms, they can either:
 - Leave all the symptom boxes unchecked and click "Submit."
 - Or check the "I am not experiencing any symptoms" box and click "Submit."

NOTE: The exact appearance of the daily 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. The daily report below is for COVID-19.

Symptom	Bearch P Bearch Bearch	슈 종 ()
List	Daily Self-Report (MM-40) Monitoree initials a Please select all symptoms which you are experiencing. Chills Congestion or Runny Nose Const.	and age
	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	(2) (2) (2)
Click to submit	Click if no symptom Sore Throat Used A Fever Reducer In the past 24 hours, have you fevers? I am not experiencing any symptoms Submit	is. Or ecked t.
	₹, 1	26% • ₁

Figure 40: Example Daily Report

3) After submitting their report, the monitoree is shown a confirmation message that says their report is complete.



Figure 41: Confirmation message

6.4.2 SMS-Texted Weblink

Monitorees who report their symptoms by SMS-Texted Weblink get a text from Sara AlertTM each day that includes a link to the Daily Report. If the monitoree is a HoH, they get a separate text message and link for each monitoree in the Household. The monitoree's age and initials appear at the end of each weblink and at the top of the Daily Report.

NOTE: The text messages may look different depending on the monitoree's cellphone.



Figure 42: Example Daily Report Message by SMS-Texted Weblink

1) Monitorees click on the link to open their Daily Report:



Figure 43: Daily Report weblink message for monitorees using SMS-Texted Weblink

2) The monitoree's Daily Report opens in a browser window.

- If the monitoree has any symptoms, they check all they are experiencing in the symptom list.
- If a monitoree has no symptoms, they can either:
 - Leave all the symptom boxes unchecked and click "Submit."
 - Or check the "I am not experiencing any symptoms" box and click "Submit."

NOTE: The Daily Report may look different depending on the monitoree's internet browser. In most cases, monitorees need to scroll down to see the full list of symptoms and the **Submit** button.



Figure 44: Example Daily Report for monitorees using SMS-Texted Weblink

3) After submitting their report, the monitoree gets a confirmation message that their report is complete.



Figure 45: SMS-Texted Weblink confirmation message

6.4.3 SMS-Text Message

Monitorees who report their symptoms by SMS Text Message get a text from Sara AlertTM each day. If the monitoree is a HoH, they get one text that applies to all the monitorees in the Household. Monitoree age and initials appear at the beginning of the text message.

Head of Household Reporter (with Self-Reporter multiple active household members) 3:56 PM \$ 77% 🔳 all 3:55 PM * 77% One text for all **Text contains** (i) (i) Household monitoree initials Members and age Wed, Sep 23, 8:00 AM Wed, Sep 30, 8:01 AM This is the Sara Alert daily report for: This is the Sara Alert daily report for: LP-17, JP-19, SS-0. Are any of these JP-19. Is this person experiencing Yes = One or more people experiencing any of the following symptoms: Cough, any of the following symptoms: symptoms in any Cough, Difficulty Breathing, New Loss of Smell, New Loss of Taste, Difficulty Breathing, New Loss of Household Yes = Any of the Shortness of Breath, Fever, Chills, Repeated Shaking with Chills, Muscle Smell, New Loss of Taste, Shortness of Breath, Fever, Chills, Repeated Member symptoms listed Pain, Headache, Sore Throat, Nausea Shaking with Chills, Muscle Pain, Or Vomiting, Diarrhea, Fatigue, Congestion or Runny Nose, Headache, Sore Throat, Nausea Or No = NoNo = None of the Vomiting, Diarrhea, Fatigue, symptoms in Please reply with "Yes" or "No" symptoms listed Congestion or Runny Nose every Household Please reply with "Yes" or "No" Member (A) (A) 0

NOTE: The text messages may look different depending on the monitoree's cellphone.



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



Figure 47: Monitoree responses to SMS-Text Daily Reports

2) If a monitoree responds with a response other than **Yes** or **No**, they get a message asking for a "Yes" or "No" answer. The system only accepts a **Yes** or **No** response.

•••• <5	3:55 PM	* 77% ••	
	Wed, Sep 16, 8:00 AM		
This is the LP-17, JP- experience symptoms Breathing Loss of Ta Fever, Chi Chills, Mu Throat, Na Diarrhea, Runny No Please rer	e Sara Alert daily report for: 19. Are any of these people ing any of the following :: Cough, Difficulty , New Loss of Smell, New ste, Shortness of Breath, Ils, Repeated Shaking with scle Pain, Headache, Sore ausea Or Vomiting, Fatigue, Congestion or se, by with "Yes" or "No"		
	Wed, Sep 16, 10:25 AM		Unaccepted Response
		Bazinga	5
l'm sorry, Please rep	I didn't quite get that. bly with "Yes" or "No"		Accepted Response
		Yes	
Thank you report!	o for completing your daily		
	Thu, Sep 17, 8:00 AM		
	Text Message		

Figure 48: Invalid responses prompt a follow-up

3) If the monitoree answers four times with something other than "Yes" or "No," the system does not record their response that day.



Figure 49: System response after four tries

6.4.4 Telephone Call

Monitorees who report their symptoms by Telephone Call have a short conversation with Sara, an automated voice. Sara starts by introducing herself. She also identifies the monitoree by initials and age:

- **EXAMPLE:** Hello, this is Sara, the automated public health assistant calling for your daily report. This is the report for: AB, age 29."
- **EXAMPLE for a HoH:** 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 then gives a list of symptoms. This is an example for COVID-19:

- **EXAMPLE:** Is this person 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?
- **EXAMPLE for an HoH**: 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 givingthe full list of symptoms, Sara says:

Please reply with Yes or No.

The monitoree says:

- Yes if they or anyone in the Household has any symptoms
- No if they don't have or no one in the Household has any symptoms

Sara then says:

Thank you for completing your daily report. Goodbye.

If the monitoree says anything other than **Yes** or **No** Sara asks to try again:

I'm sorry, I didn't quite get that. Let's try again.

If the monitoree says something other than Yes or No for four tries, Sara says:

I'm sorry, you've reached the maximum number of response attempts. If you are experiencing a medical emergency, please call 911."

If this happens, the monitoree can't submit a Daily Report until the next day.