1 **Which user types can view Exposure Monitoring dashboard?**

Public Health User **Public Health Enroller** **Contact Tracer** **Super User**

Exposure Monitoring

- Monitorees are enrolled by public health because of potential exposure.

- Monitorees receive notifications to submit daily report during monitoring period.

- COVID-19 configuration: Monitorees are automatically closed if Asymptomatic 14 days after Last Date of Exposure, or on Non-Reporting with no updates for 30 days.

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

Data Access
- Monitorees associated with your assigned jurisdiction.

Actions
- Toggle between Exposure / Isolation / Global Dashboards
- View monitoring line lists in your assigned jurisdiction
- Modify/view record details of monitorees in jurisdiction
- View and export analytics summary for your jurisdiction
- Batch import new monitorees
- Export monitoree records
- Create and modify reporting households
- Manage monitorees, to include:
  - Move monitorees between line lists, view/add/modify daily reports, add comments, document public health actions, transfer monitoree to another jurisdiction, end exposure monitoring
- 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 Monitorees" list.

Symptomatic	Non-Reporting	Asymptomatic	PUI
Criteria: Reported symptom(s) which require review by a public health user to determine if disease is suspected. **Daily Notifications Sent?** Yes, if eligible.	**Criteria**: Have not reported within expected time period (e.g., 24 hours for COVID) and have no symptom reports that require review. May require public health follow-up. **Daily Notifications Sent?** Yes, if eligible.	**Criteria**: Have reported an absence of symptoms within expected time period OR reported a symptom within expected time period that has been marked as reviewed. **Daily Notifications Sent?** Yes, if eligible.	**Criteria**: Currently under active investigation; a public health action has been documented in the record to move it to PUI line list. **Daily Notifications Sent?** Yes, if eligible.

Closed	Transferred In	Transferred Out	All Monitorees
Criteria: Not being monitored. Sara Alert automatically moves records to the closed line list if they are on Asymptomatic line list after the monitoring period expires, or on Non-Reporting line list if they have not been updated for a specified period of time. **Daily Notifications Sent?** No, unless eligible as Head of Household.	**Criteria**: Has been transferred from another jurisdiction within the last 24 hours. Will also appear on the appropriate line list (e.g., Symptomatic, Non-Reporting, etc.) depending upon record values. **Daily Notifications Sent?** Depends on which monitoring line list record is on	**Criteria**: Has been transferred to another jurisdiction. Originating jurisdiction will no longer have access to record details. Will remain on this line list until record is purged. Will not appear on any other line lists for the originating jurisdiction. **Daily Notifications Sent?** N/A	**Criteria**: Lists monitorees across all line lists in the exposure workflow. The status column shows which line list a record is also on. **Daily Notifications Sent?** Depends on which monitoring line list (e.g., status) record is on

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Scenario	Starting Line List	Ending Line List	Action
Monitoree symptom report has been evaluated and public health determines disease of interest not suspected (e.g., inaccurate report, explained by other causes)	Symptomatic	Asymptomatic or Non-reporting (If a Symptom Onset Date was not manually entered)	1. Open monitoree record 2. Click "Mark All as Reviewed" (will apply to all reports) or "Review" (will apply to a single report) in reports section 3. Document reasoning 4. Click "Submit" to save the change
User wants to identify COVID-19 monitorees who may be able to end monitoring after day 7 or 10	Non-Reporting, Asymptomatic, PUI	Same as starting line list	1. Open Advanced Filter and select "Candidate to Reduce Quarantine after 7 Days or 10 Days. 2. Select "True" and click "Apply"
Monitoree report of symptoms has been evaluated by public health and person is now under investigation for disease of concern	Symptomatic, Non-Reporting	PUI	1. Open monitoree record 2. Change "Latest Public Health Action" to any value other than "None" 3. Document reason for change 4. Click "Submit" to save the change
PUI in exposure monitoring meets case definition. Sara Alert will be used to monitor case until recovery definition met.	PUI	Reporting or Non-Reporting (Isolation Workflow)	1. Open monitoree record 2. Change "Case Status" to Confirmed or Probable 3. Select "Continue Monitoring…"
User wants to move a monitoree off the PUI line list after individual did not meet case definition	PUI	Symptomatic, Non-Reporting, Asymptomatic	1. Open monitoree record 2. Change "Case Status" to Suspect, Not a Case, or Unknown **OR** change Latest Public Health Action to "None" 3. Click "Submit"
User contacts monitoree 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	Symptomatic or Asymptomatic based on report	1. Open monitoree record 2. Click "+ Add New Report" 3. Complete report 4. Click "Submit" to save report
Monitoree does not report directly to Sara Alert through web-link, text, or phone call. Public health contacts monitoree manually and needs to add report information.	Symptomatic, Non-Reporting, Asymptomatic	Symptomatic or Asymptomatic based on report	1. Open monitoree record 2. Click "+ Add New Report" 3. Complete report 4. Click "Submit" to save report
Users wants to document contact attempt to monitoree	Symptomatic, Non-Reporting, Asymptomatic, PUI	Same as starting line list	1. Open monitoree record 2. Select "Log Manual Contact Attempt" 3. Select "Successful" or "Unsuccessful"
User wants to pause or resume daily report reminders to a monitoree eligible to receive notifications **(NOTE:** Pausing notifications for a Head of Household will pause for all household members)	Symptomatic, Non-Reporting, Asymptomatic	Same as starting line list	1. Open monitoree record 2. Select "Pause Notifications" or "Resume Notifications" **(NOTE:** Pause notifications is only available for monitorees on active line lists who are Head of Households or self-reporters)
User wants to manually close a record to end active monitoring *(Note: The system will stop sending daily report reminders for this monitoree after closed)*	Symptomatic, Non-Reporting, Asymptomatic, PUI	Closed	1. Open monitoree record 2. Change "Monitoring Status" from "Actively Monitoring" to "Not Monitoring" 3. Document reason for change 4. Click "Submit" to save the change
Close records that meet specified criteria to end active monitoring *(Note: The system will stop sending daily report reminders for selected monitorees after closed)*	Symptomatic, Non-Reporting, Asymptomatic, PUI	Closed	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
Monitoree should be monitored by another jurisdiction	Symptomatic, Non-Reporting, Asymptomatic, PUI, or Closed	Transferred Out	1. Open monitoree record 2. Click "Download Excel Export" to save record locally (if required for record retention) 3. Change "Assigned Jurisdiction" to the new jurisdiction (from drop down list) 4. Click "Change Jurisdiction" to transfer
Monitoree's last date of exposure is unknown due to a continuous exposure (e.g., healthcare personnel, household case)	Symptomatic, Non-Reporting, Asymptomatic, PUI	Same as starting line list	1. Open monitoree record 2. Click "Continuous Exposure" and "Submit" 3. Update last date of exposure when known

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