



Sara Alert TM
Secure monitoring and reporting for public health

User Guide for Enrollers

Software Version 1.37
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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

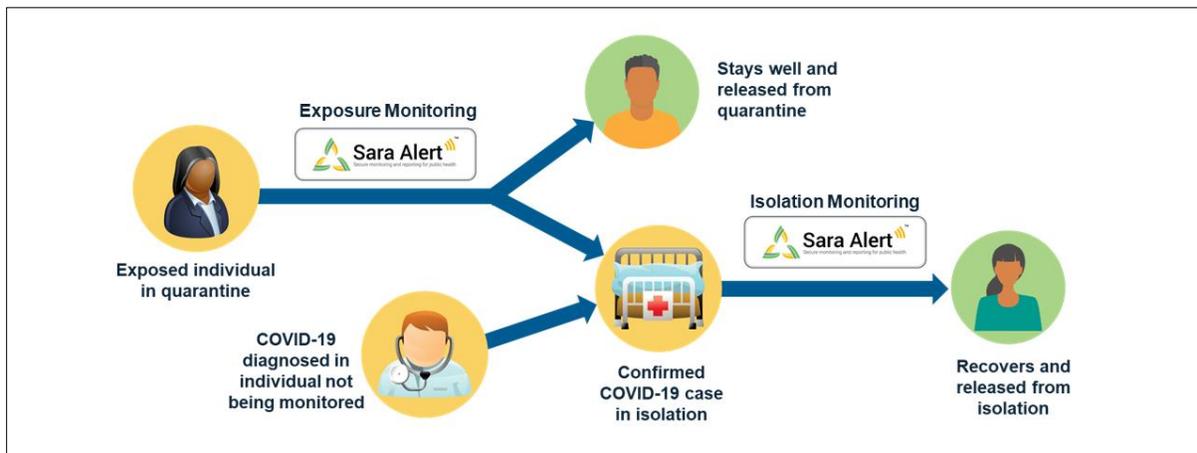


Figure 1: Sara Alert™ Concept of Operations

1.2 Workflow Summary

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

- **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.

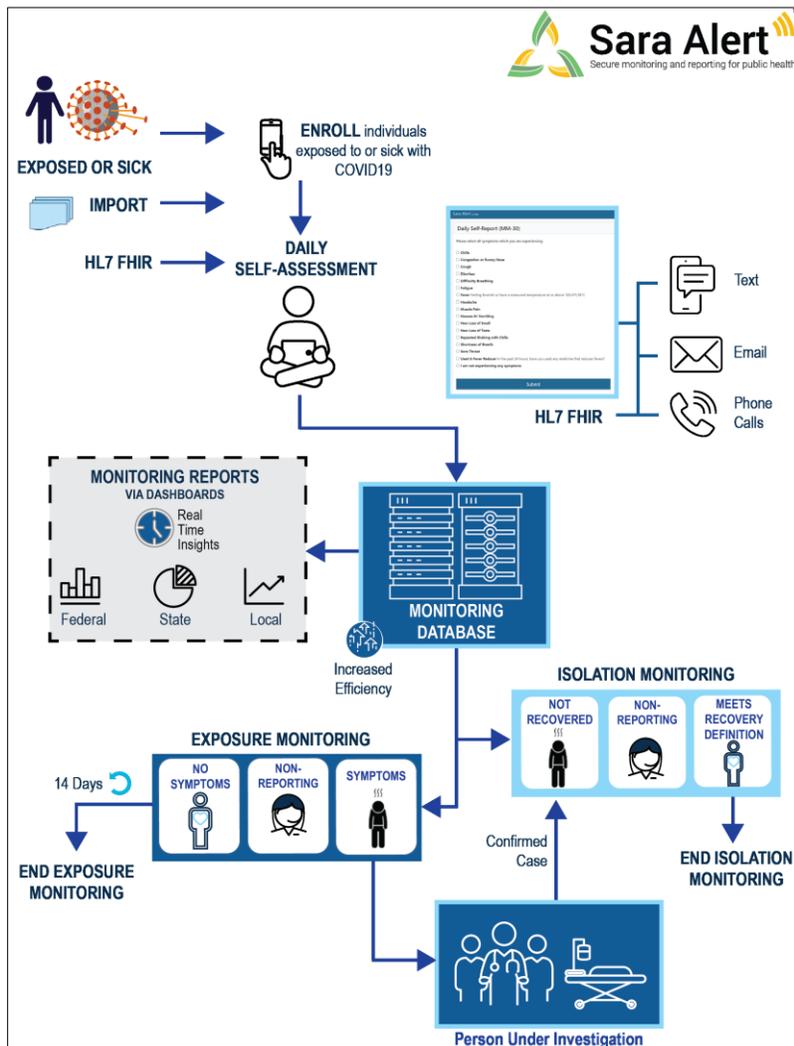


Figure 2. Sara Alert™ Workflow Summary

Visit saraalert.org 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.

2 ENROLLER ROLE OVERVIEW

As an enroller, you can add new people (called monitorees) into Sara Alert™. 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.

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

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 Alert™ 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 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

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.

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

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 Alert™.** 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.

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.

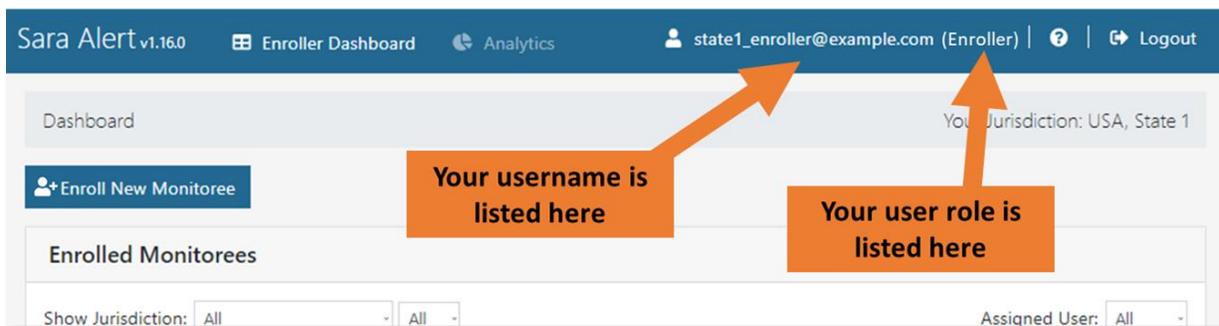


Figure 6: Your Sara Alert™ username and user role

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.

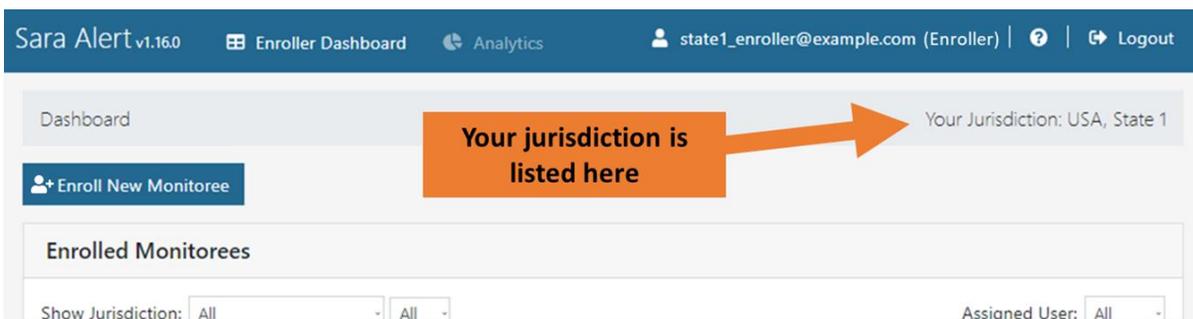


Figure 7: Your Sara Alert™ jurisdiction

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.

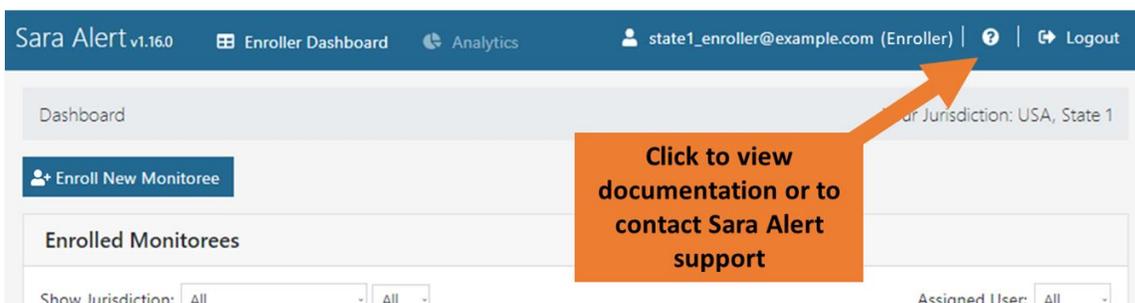


Figure 8: Access to Sara Alert™ resources

9) To end the session, click “**Logout**.” Be sure to log out of the system when you’re not using it.

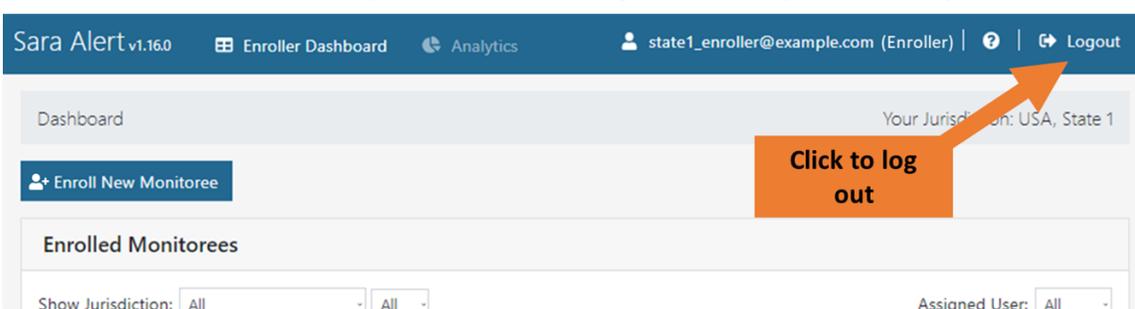


Figure 9: The logout button

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: saraalert.org/public-health/tutorial-videos/

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 menu into three categories (in order from top to bottom): fully supported languages (supported for all Preferred Reporting Methods), partially supported languages (supported for some Preferred Reporting Methods), and unsupported languages (not supported for any Preferred Reporting Methods). If a monitoree’s Primary Language is not supported for their selected Preferred Reporting Method, they will receive messages in English.

4.2 Monitree 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 Monitree 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 monitree’s preferred reporting method, select **Unknown**, and the monitree will not receive notifications. This is the system default value.
 - If the monitree is enrolled in the system but has asked not to receive notifications, select **Opt-Out** for the preferred reporting method, and the monitree will not receive notifications.
 - If you try to enter a phone number that is blocking Sara Alert™ texts, you’ll see a warning message in the monitree’s record. See **page 28** for more details.
 - For monitorees with an **SMS** or **Telephone** method selected, the system will send notifications only to the Primary Telephone Number. Numbers entered in the Secondary Telephone Number or International Telephone Number fields are not used by Sara Alert for monitoring.

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

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

NOTE: If the monitree’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 monitree 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 monitree’s state entered on the “Monitree Address” screen. If the state field is blank, the Eastern Time Zone is used.

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. For 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: <https://www.cste.org/page/PositionStatements>.

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 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.

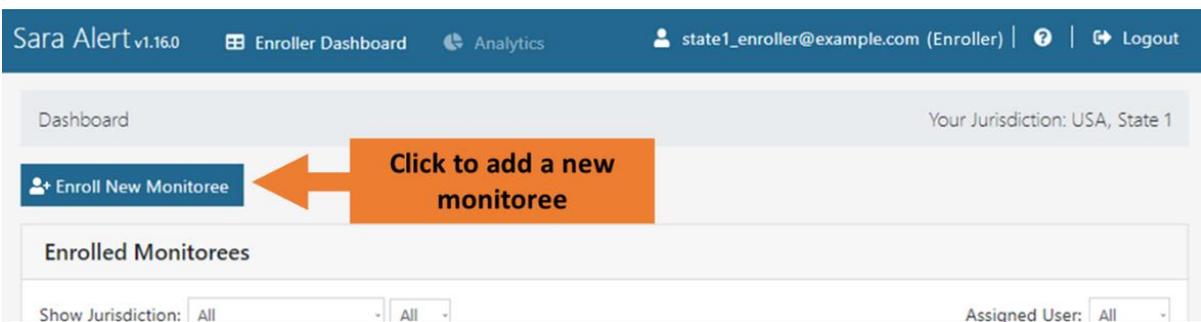


Figure 10: Enroll new monitoree

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.



Figure 11: Select Exposure or Isolation workflow

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) | v

FIRST NAME *
Donald

MIDDLE NAME(S)
|

LAST NAME *
Duck

DATE OF BIRTH *
01/01/1970

AGE
51

SEX AT BIRTH ?
| v

GENDER IDENTITY ?
| v

SEXUAL ORIENTATION ?
| v

RACE (SELECT ALL THAT APPLY)
 WHITE
 BLACK OR AFRICAN AMERICAN
 AMERICAN INDIAN OR ALASKA NATIVE
 ASIAN
 NATIVE HAWAIIAN OR OTHER PACIFIC ISLANDER
 OTHER
 UNKNOWN
 REFUSED TO ANSWER

ETHNICITY
| v

LANGUAGE
Languages that are not fully supported are indicated by a (*) in the below list.

PRIMARY LANGUAGE ?
| v

SECONDARY LANGUAGE ?
| v

INTERPRETATION REQUIRED

NATIONALITY
|

STATE/LOCAL ID
|

CDC ID
|

NNDSS LOC. REC. ID/CASE ID
|

Click "Next" to advance to the next section

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.

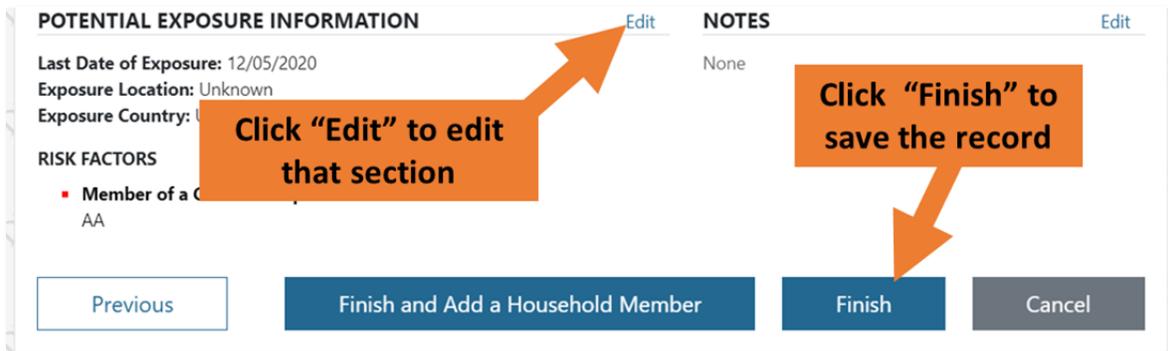


Figure 13: Click “Finish” to save the record

5) Sara Alert™ 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.

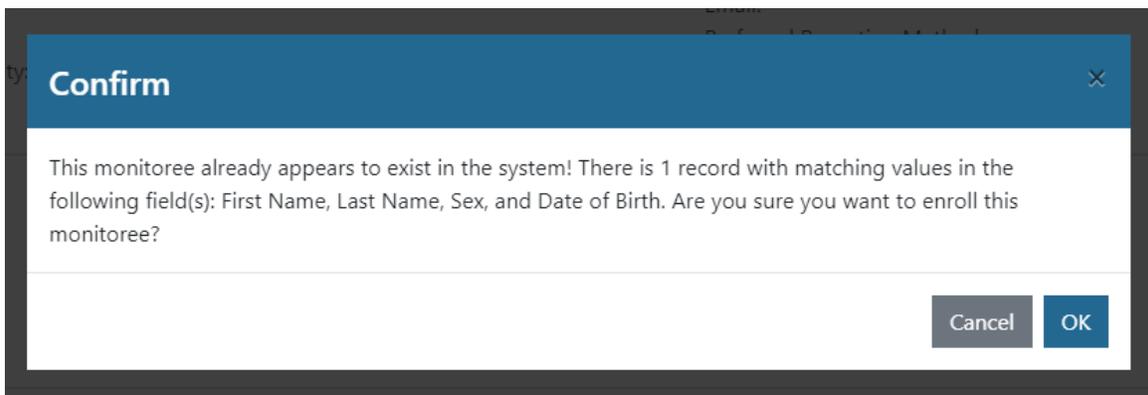


Figure 14: A confirmation box will appear for potential duplicate records

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

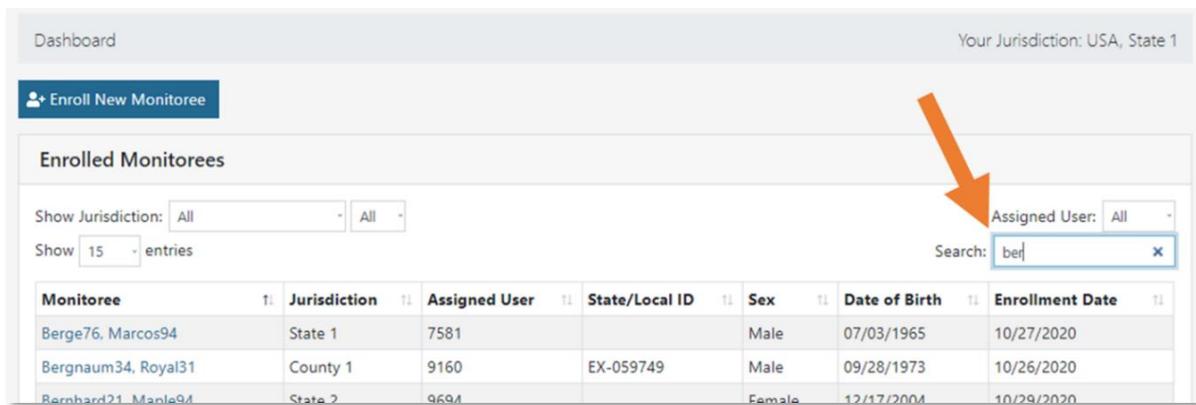


Figure 15: Search enroller dashboard

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



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.

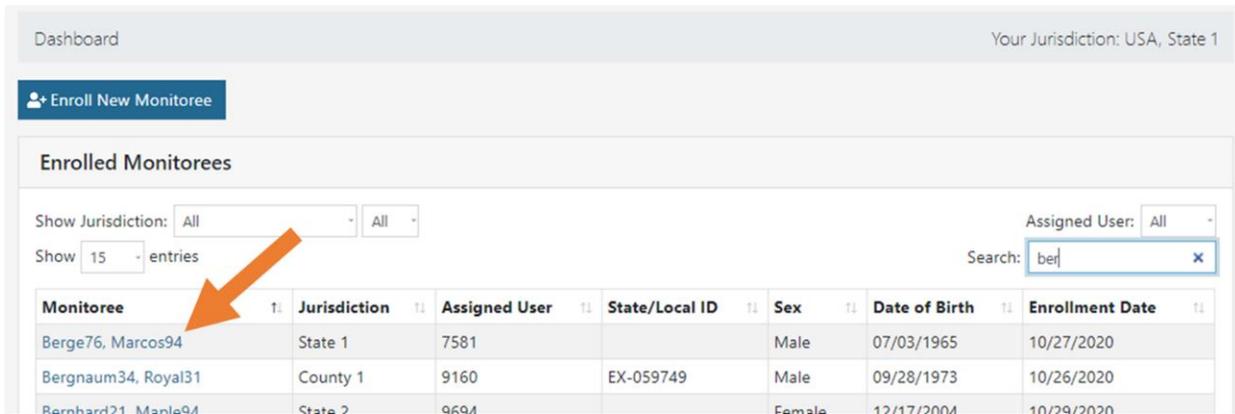


Figure 17: Select monitoree record

- 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.

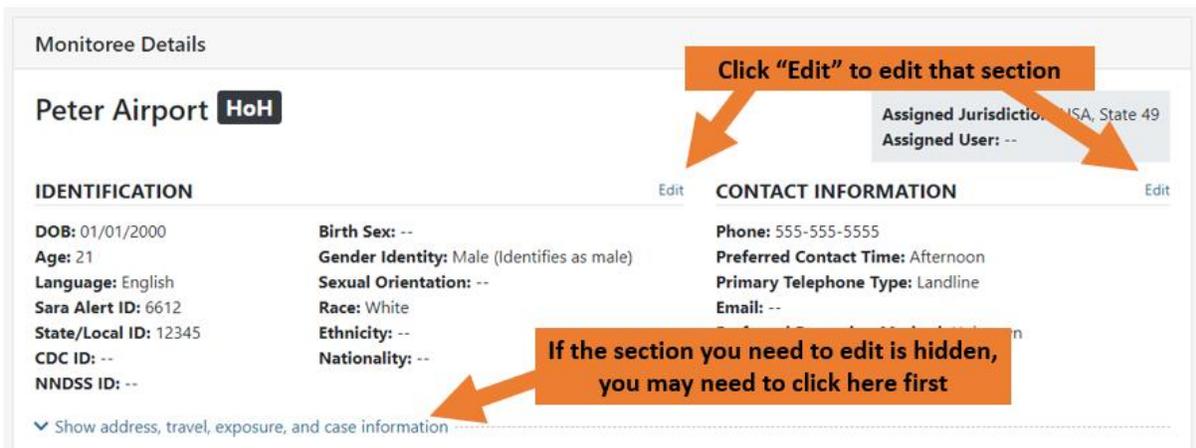


Figure 18: Modify monitoree record

5.4 How to Create a Reporting Household During Enrollment

Tip: A reporting household means that more than one person has the same phone number or email address. See the [Quick Start Guide for Household Reporting](#).

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 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.

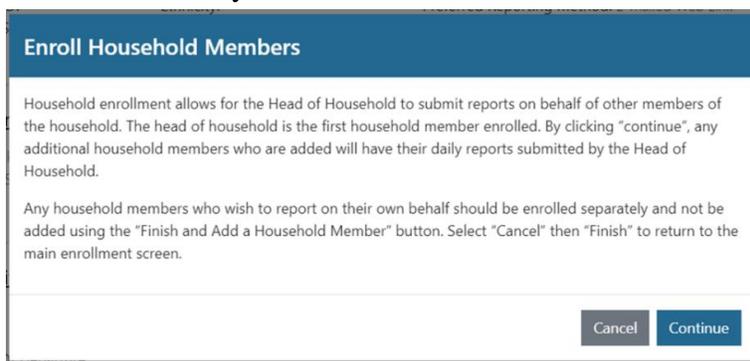


Figure 20: Note how Sara Alert™ handles household enrollment

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

Pepperoni Airport

Assigned Jurisdiction: USA, State 49
Assigned User: 6478

IDENTIFICATION Edit

DOB: 01/01/1976 **Birth Sex:** Male
Age: 45 **Gender Identity:** Male (Identifies as male)
Language: French **Sexual Orientation:** --
Sara Alert ID: 6627 **Race:** White, Asian
State/Local ID: 12345 **Ethnicity:** Not Hispanic or Latino
CDC ID: 67899 **Nationality:** --
NNDSS ID: 12346

CONTACT INFORMATION Edit

Phone: 555-555-5555
Preferred Contact Time: Afternoon
Primary Telephone Type: Landline
Email: --
Preferred Reporting Method: Unknown

Hide address, travel, exposure, and case information

ADDRESS Edit

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: --

ARRIVAL INFORMATION Edit

DEPARTED

Port of Origin: London
Date of Departure: 03/22/2021
Carrier: himself
Flight or Vessel #: --

ARRIVAL

Port of Entry: --
Date of Arrival: 03/22/2021

ADDITIONAL PLANNED TRAVEL Edit

Type: Domestic
Place: Illinois
Port of Departure: --
Start Date: 05/12/2021
End Date: --

NOTES

UG Screenshot

POTENTIAL EXPOSURE INFORMATION Edit

Last Date of Exposure: 03/30/2021
Exposure Location: --
Exposure Country: Algeria

RISK FACTORS

- Close Contact with a Known Case
865
- Member of a Common Exposure Cohort
- Was in Healthcare Facility with Known Cases
UG Hospital

The reporting responsibility for this monitoree is handled by Peter Airport Edit

[Remove From Household](#)

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.

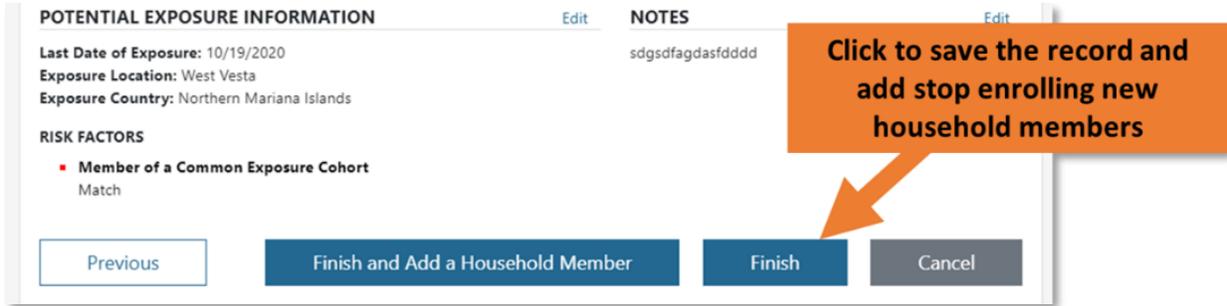


Figure 22: Click “Finish” when all household members have been enrolled.

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

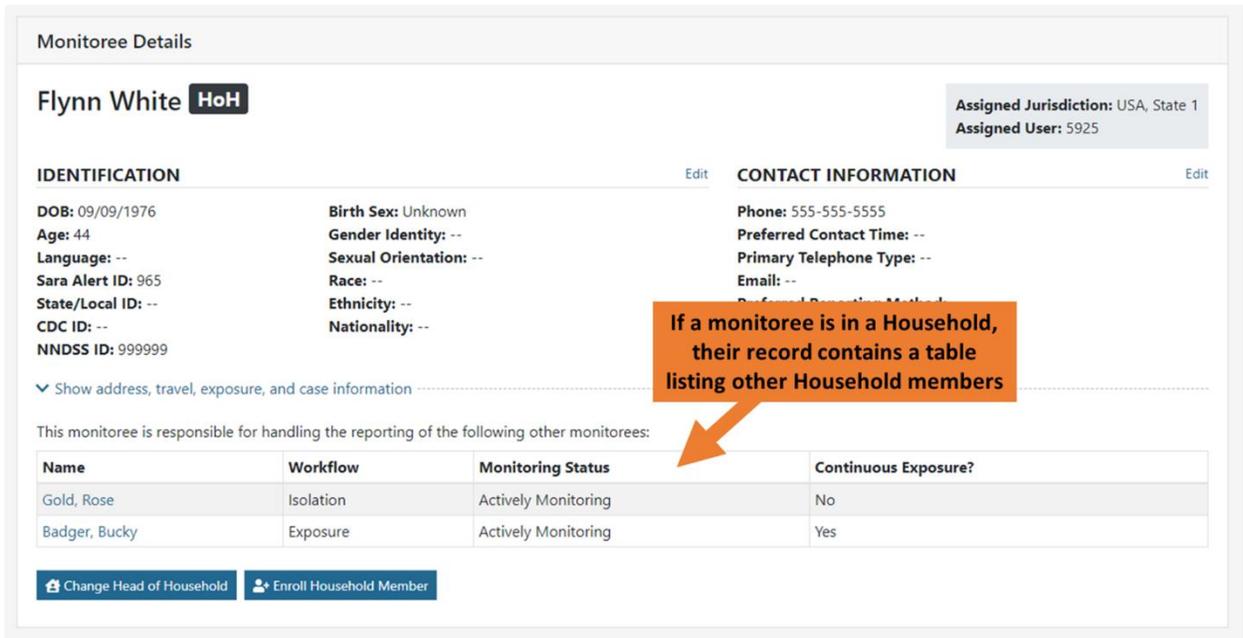


Figure 23: If a monitoree is in a Household, their record contains a table listing other Household members

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.

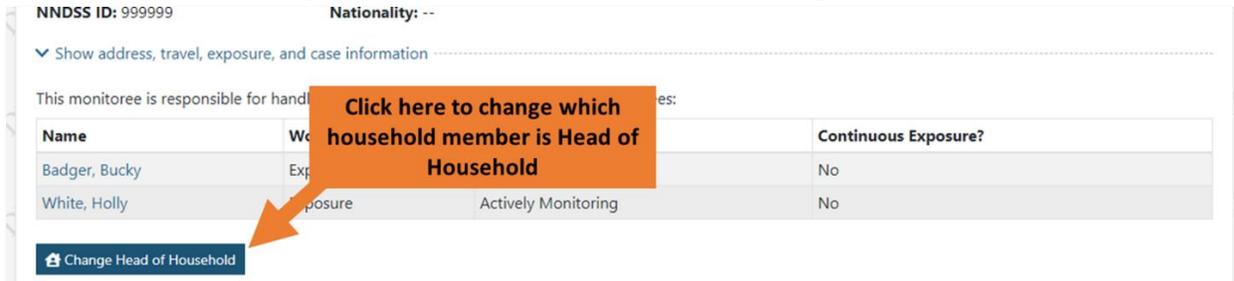


Figure 24: Click “Change Head of Household”

- 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.

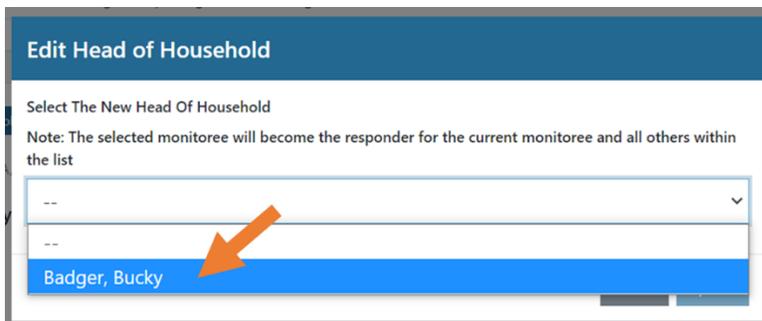


Figure 25: Select the preferred Head of Household

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.

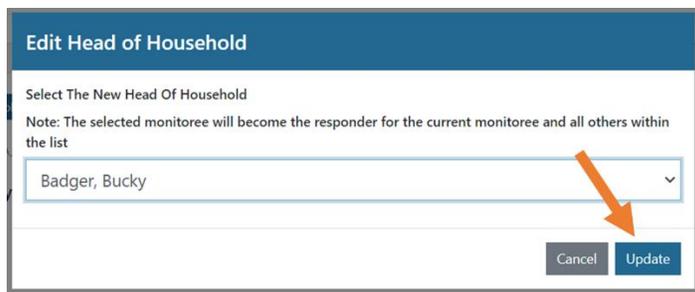


Figure 26: Click Update to save the Head of Household

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

1) Open one of these records:

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

2) On the Monitree Details screen, click “Enroll Household Member.”

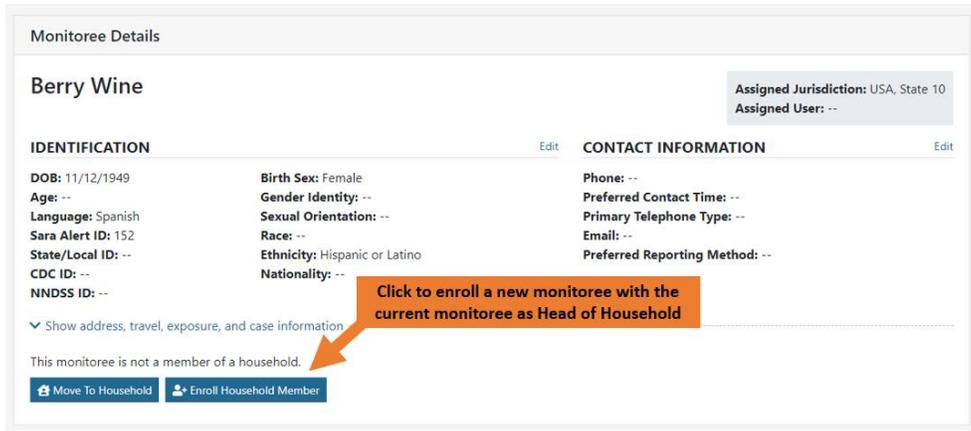


Figure 27: Select "Finish and Add a Household Member" to add new household member

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 monitree record and click the “**Move to Household**” button.

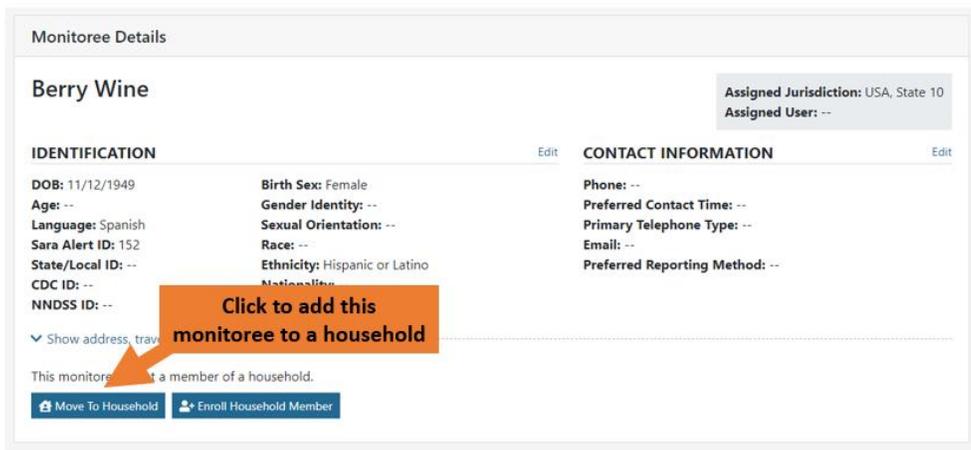


Figure 28: Click "Move to Household"

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
 - Last Name
 - Date of Birth (format: YYYY-MM-DD)
 - 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.

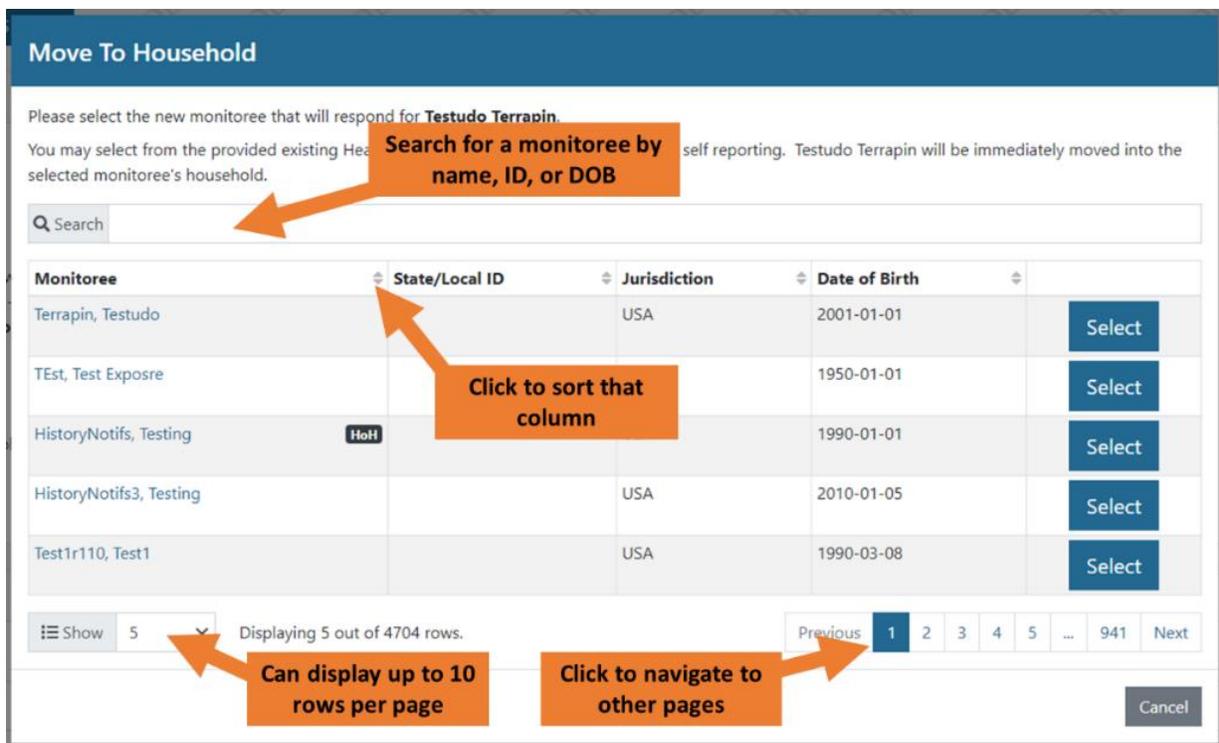


Figure 29: Search for monitorees the same way as in the Monitoring Dashboards.

3) Click “Select” to add the monitree to the selected monitree’s Household. This makes that selected monitree the HoH.

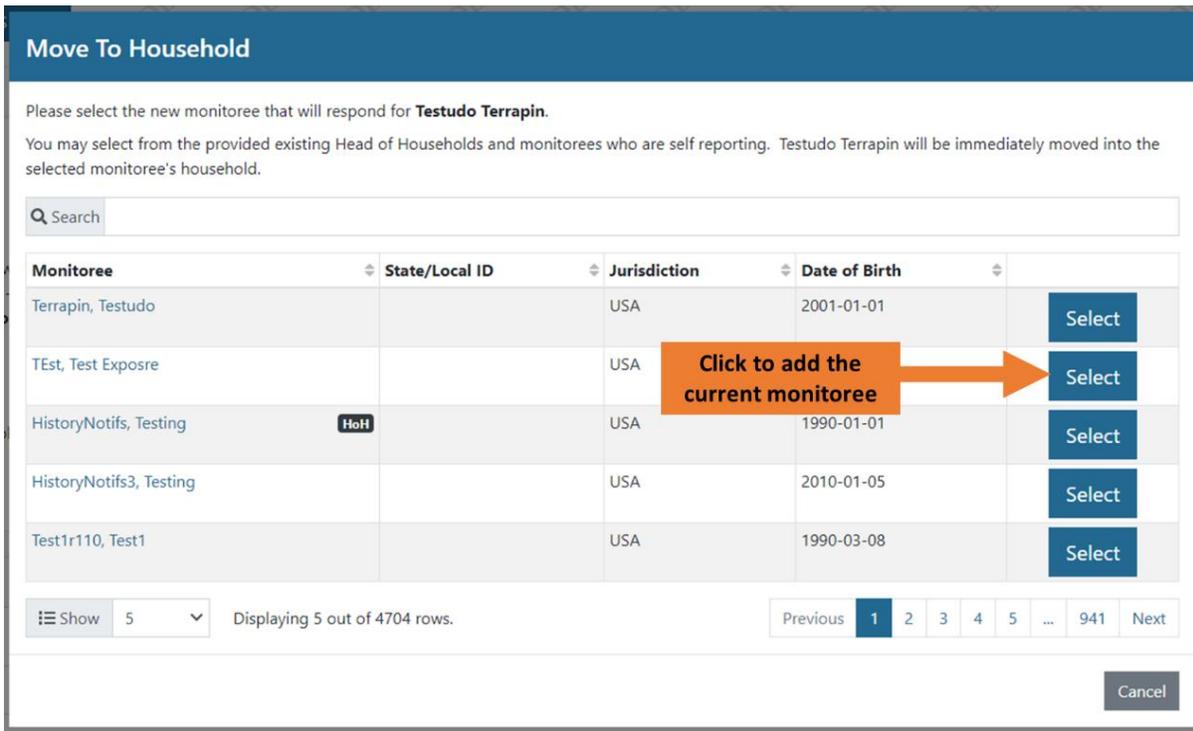


Figure 30: Click “Select” to move the monitree into the selected Household.

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

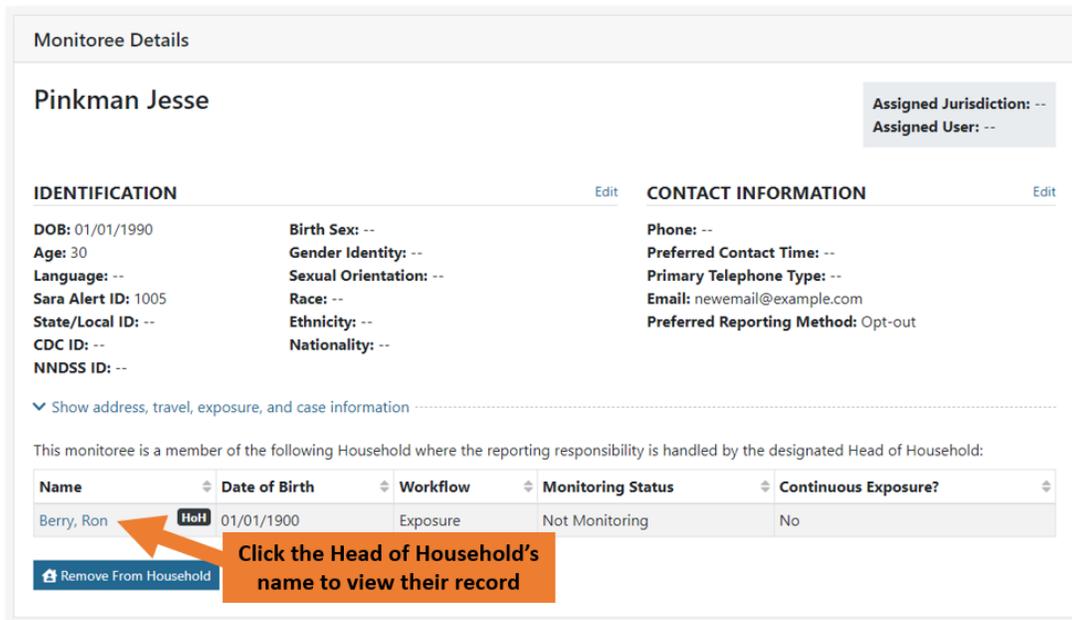


Figure 31: The selected HoH is now responsible for reporting on behalf of the monitree

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

Pinkman Jesse

Assigned Jurisdiction: USA
Assigned User: --

IDENTIFICATION		CONTACT INFORMATION
DOB: 01/01/1990	Birth Sex: --	Phone: 999-999-9999
Age: 30	Gender Identity: --	Preferred Contact Time: --
Language: --	Sexual Orientation: --	Primary Telephone Type: --
State/Local ID: --	Race: --	Email: example11@example.com
CDC ID: --	Ethnicity: --	Preferred Reporting Method: Opt-out

Figure 32: Edit contact information to remove a record from a household.

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
+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 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.

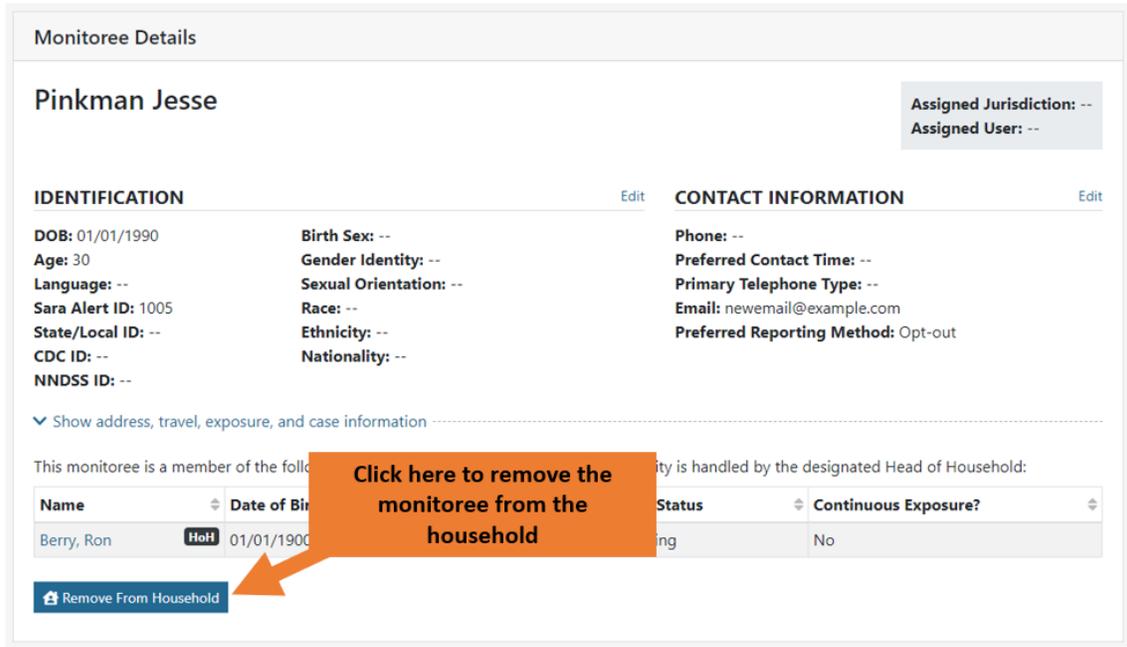


Figure 34: Select “Remove Household.”

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.

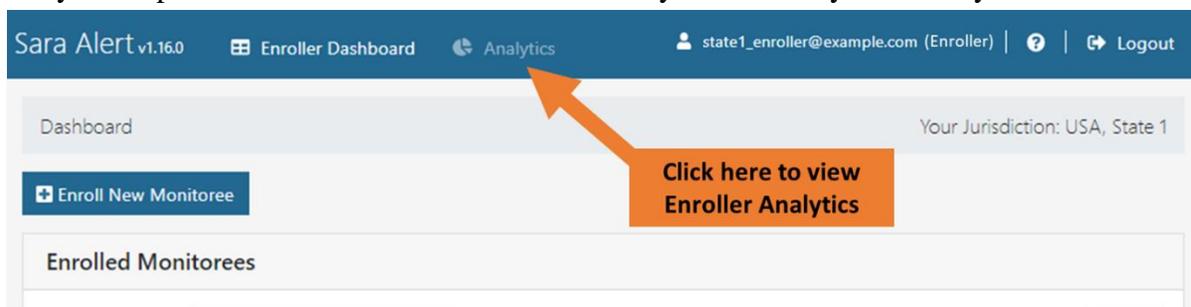


Figure 35: View enroller analytics.

6 MONITOREE SELF-REPORTING OVERVIEW

Monitorees are the people you enroll in Sara Alert™ 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 [Quick Start Guide for Preferred Reporting Method](#)

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 Alert™ messages and are not listed in the table.

Table 1: Messages Sent to Monitorees

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: <ul style="list-style-type: none"> • Monitoree initials and age (for example AH-42) • A link to the Sara Alert privacy policy 	Sent right after enrollment; includes: <ul style="list-style-type: none"> • Monitoree initials and age (for example, AH-42) • A link to the Sara Alert™ privacy policy 	None sent
Daily Report Message	<ul style="list-style-type: none"> • 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. <p>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).</p>	<ul style="list-style-type: none"> • 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. <p>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.</p>	<ul style="list-style-type: none"> • 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. <p>If HoH: The HoH gets one text message with one yes/no response for all symptoms for all Household members.</p>	<ul style="list-style-type: none"> • 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. <p>If HoH: The HoH gets one phone call with one yes/no question for all symptoms for all Household members.</p>

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 Alert™ messages in the primary language you entered for them during enrollment. Sara Alert isn’t available in all languages. Languages are organized in the drop-down by supported languages, partially supported languages, and unsupported languages. If a language is supported, Sara Alert can send a monitoree’s automated reports in that language. If the language is partially supported, Sara Alert can send automated reports in that language via some preferred reporting methods, and a message will appear on enrollment with more details. If a language is selected that is currently unsupported, the system will send messages to the monitoree in English.

6.2.2 Welcome Message (Email and SMS Texts only)

Monitorees need to know when to expect the Sara Alert™ 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 Alert™ 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 Alert™.

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

Monitorees can opt-out of Sara Alert™ 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.

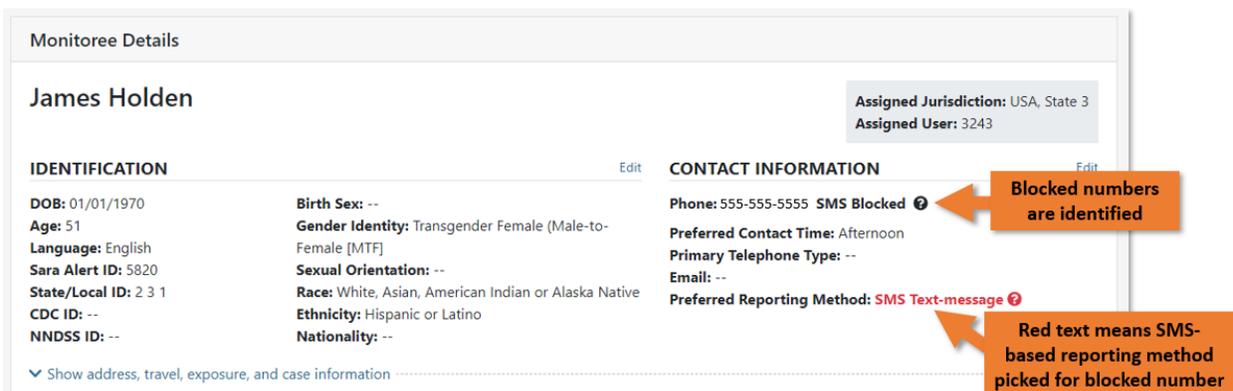


Figure 36: The Monitoree Details screen shows if a monitoree has blocked texts from Sara Alert™

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

The screenshot shows a form titled "Monitoree Contact Information". It has two columns: "PREFERRED REPORTING METHOD" and "PREFERRED CONTACT TIME". The "PREFERRED REPORTING METHOD" dropdown is set to "SMS Texted Web". The "PREFERRED CONTACT TIME" dropdown is empty. Below these are fields for "PRIMARY TELEPHONE NUMBER" (containing "555-555-5555") and "SECONDARY TELEPHONE NUMBER" (empty). A red warning banner at the bottom reads: "Warning: SMS-based reporting selected and this phone number has blocked SMS communications with Sara Alert". An orange callout box with arrows pointing to the "SMS Blocked" status and the warning banner contains the text: "The system will indicate if a phone number has blocked text messages from Sara Alert".

Figure 37: On the Monitoree Contact Information screen, SMS Blocked message for a phone number that has opted out Sara Alert™ 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 Alert™. The Sara Alert website has a fact sheet aimed at monitorees, which explains what to expect when being contacted by Sara Alert. See [How Sara Alert Works: Protecting Your Information](#). 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:
 - Social Security number
 - Bank account or credit card numbers
 - 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 descriptions and screenshots of how monitorees submit Daily Reports using each of the four Preferred Reporting Methods.

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

6.4.1 E-mailed Web Link

Monitorees who report their symptoms by E-Mailed Web Link get an email from Sara Alert™ 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.

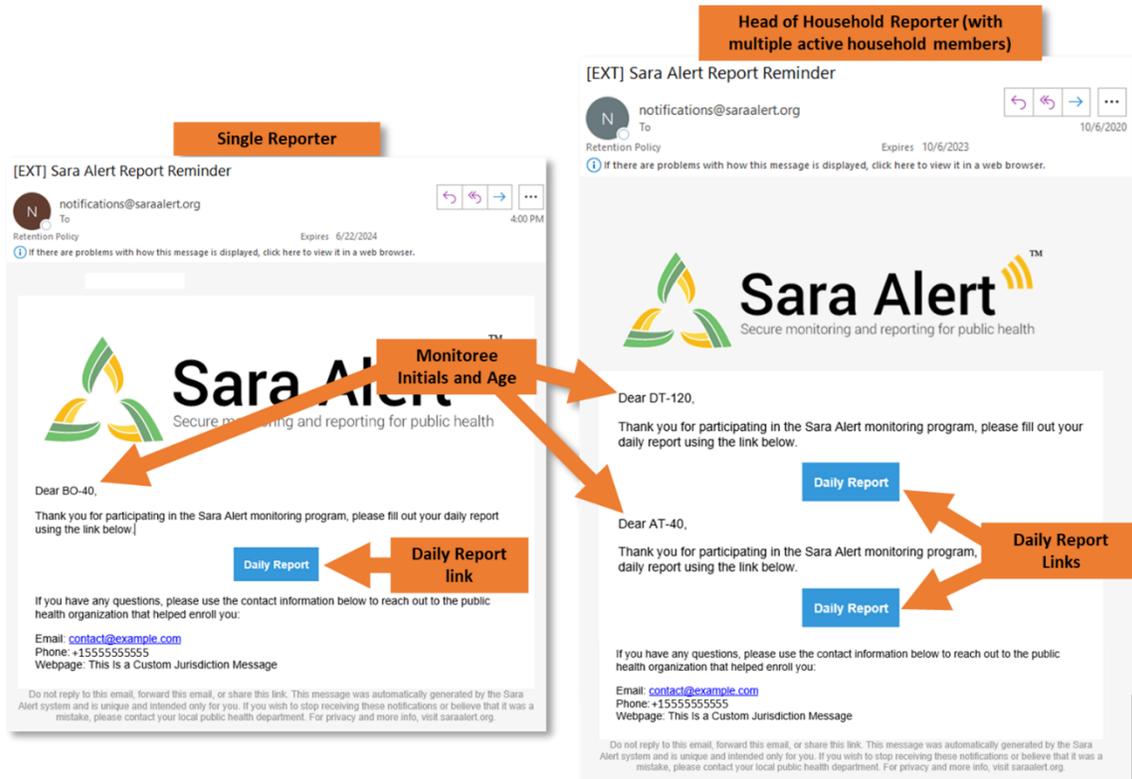


Figure 38: Example Daily Report message emails

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.

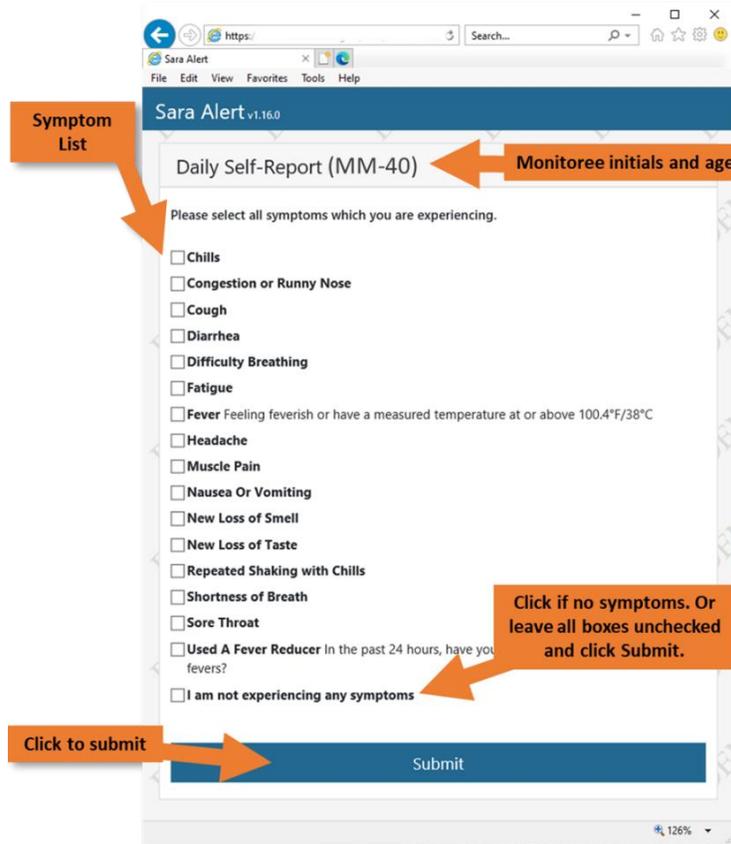


Figure 40: Example Daily Report

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

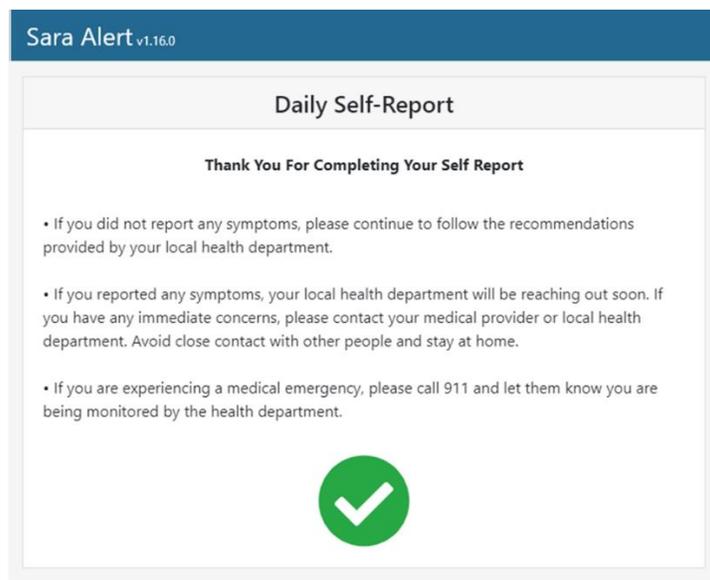


Figure 41: Confirmation message

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6.4.2 SMS-Texted Weblink

Monitorees who report their symptoms by SMS-Texted Weblink get a text from Sara Alert™ 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.

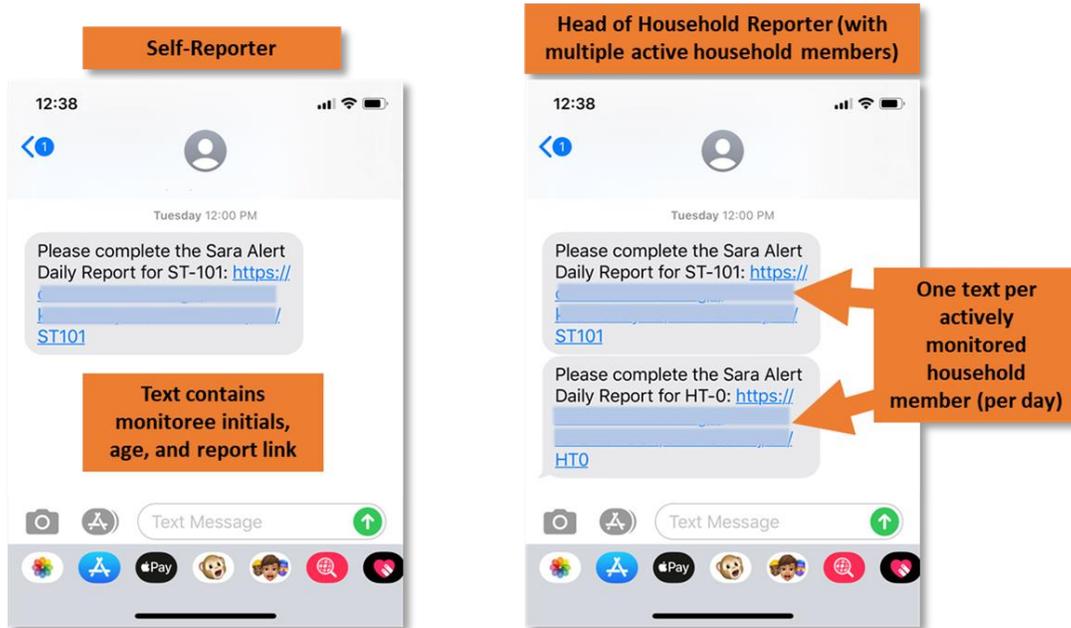


Figure 42: Example Daily Report Message by SMS-Texted Weblink

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

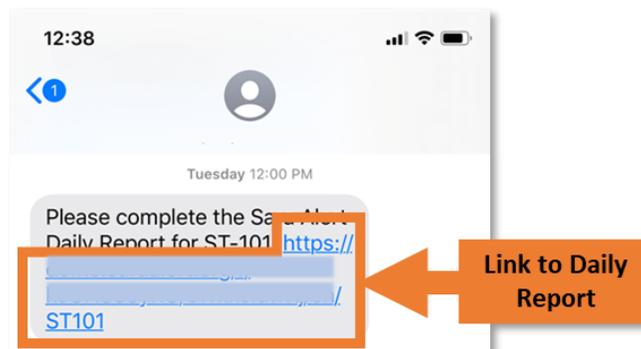


Figure 43: Daily Report weblink message for monitorees using SMS-Texted Weblink

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.

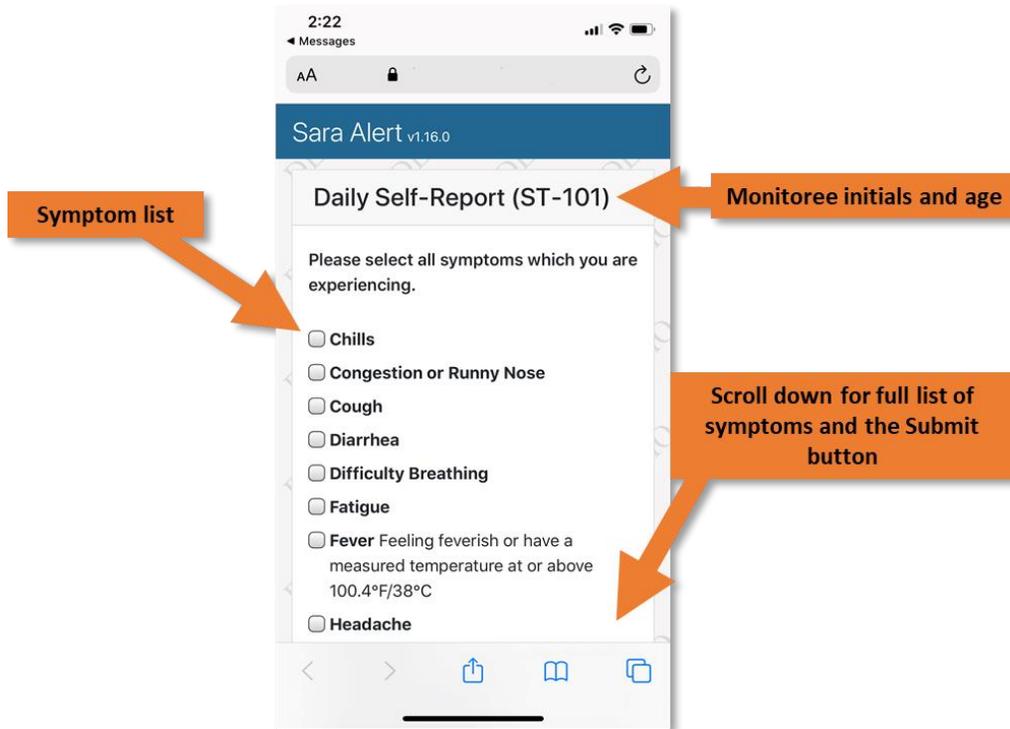


Figure 44: Example Daily Report for monitorees using SMS-Texted Weblink

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



Figure 45: SMS-Texted Weblink confirmation message

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6.4.3 SMS-Text Message

Monitorees who report their symptoms by SMS Text Message get a text from Sara Alert™ 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.

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

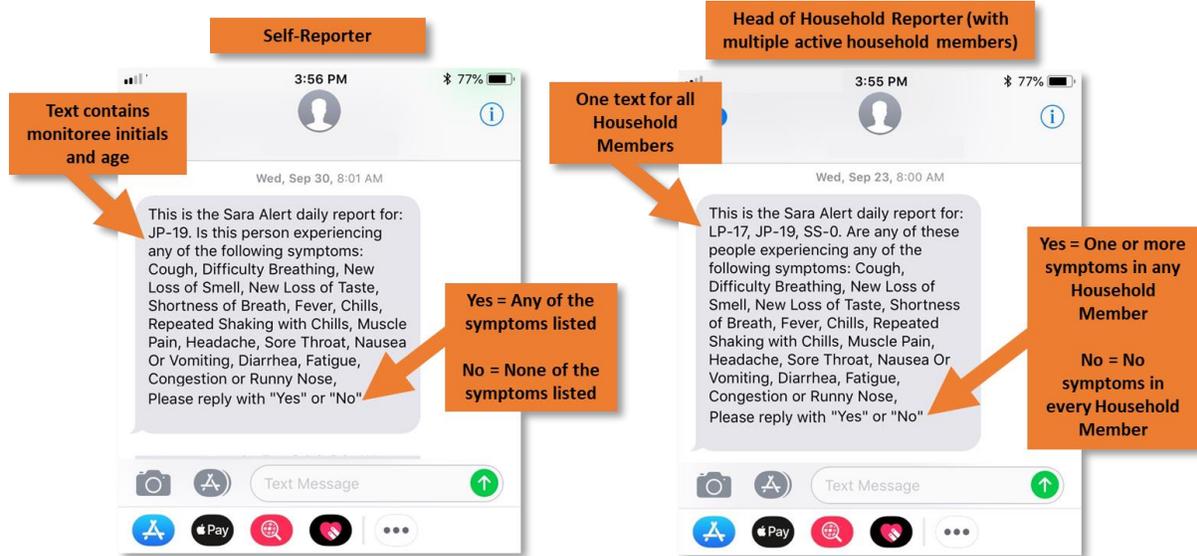


Figure 46: Example Daily Report text messages

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

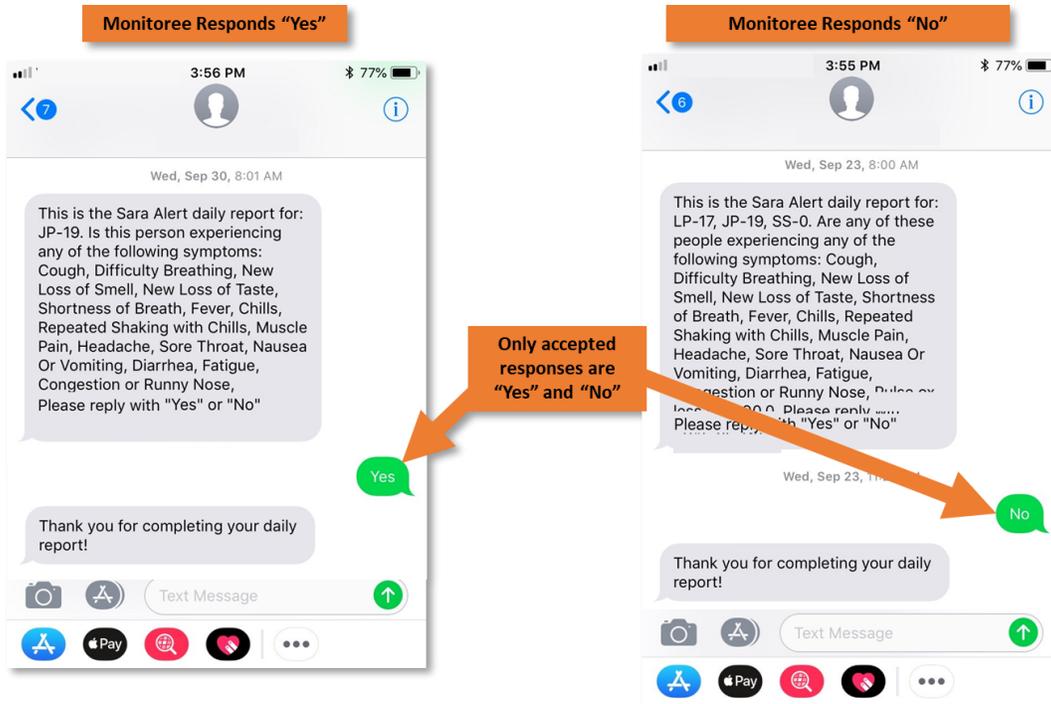


Figure 47: Monitoree responses to SMS-Text Daily Reports

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.

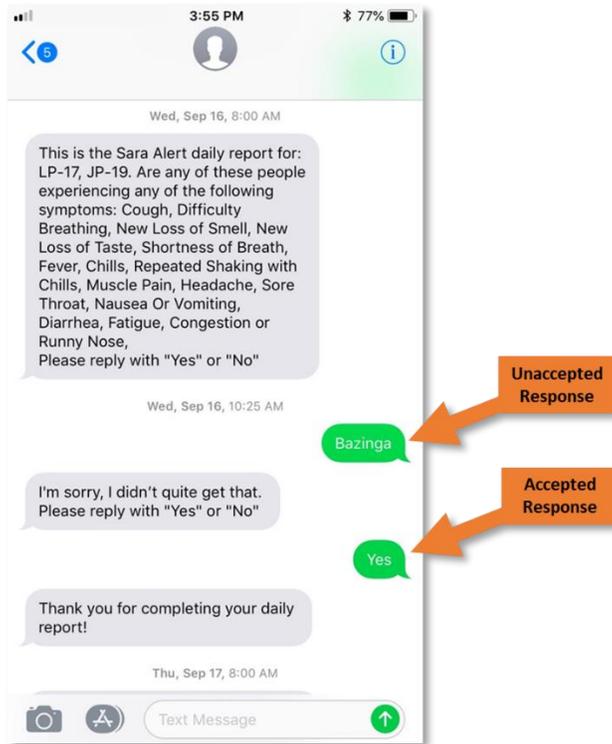


Figure 48: Invalid responses prompt a follow-up

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

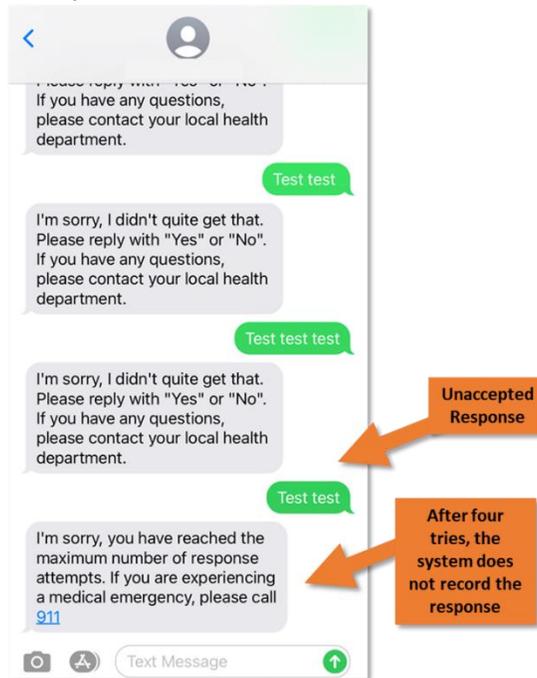


Figure 49: System response after four tries

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 giving the 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.