



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

# Resource Glossary

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# Introduction

This resource glossary defines common terms and abbreviations used in the Sara Alert system documentation, trainings, videos, and informational meetings. Terms are organized alphabetically, and definitions are written in plain language. This glossary is intended to supplement other user documentation, like the User Guide and Data Dictionary, and not meant to replace them.

Visit [saraalert.org](https://saraalert.org) for more information about Sara Alert, including FAQs, tutorial videos, and fact sheets. To send questions, comments, or other feedback related to Sara Alert, email [sarasupport@aimsplatform.com](mailto:sarasupport@aimsplatform.com).

## Sara Alert™ Resource Glossary

**2FA:** A security feature for Sara Alert. It means that there are two ways the system makes sure you have permission to log in. When you log in to Sara Alert, you have to enter:

1. Your Sara Alert password
2. A seven-digit number (called a token) that is sent to your phone from Sara Alert

**2FA Enabled:** In the Sara Alert Admin Panel, shows if a user has configured their account for 2FA.

**active monitoring:** When a monitoree is currently being monitored by Sara Alert. A monitoree is under active monitoring if their record is on any line list except for “Closed.”

**Administrator:** Someone who manages the work of Sara Alert users in their jurisdiction. Along with Super Users, Administrators are the only users who can add new users to Sara Alert, change a user’s information, see users’ work history, and see a list of users in their jurisdiction.

**Admin Panel:** The main view for Administrator users; also accessible to Super Users. It shows a list of users in your jurisdiction and lets you manage things like password resets and locked accounts.

**Advanced Filter:** Allows you to find a specific group of monitorees based on some characteristic or data in their record. For example, you can create an advanced filter to find monitorees with the same primary language, age, and enroll date.

**Analytics view:** Reports summarizing system data for your jurisdiction. Analysts, Public Health users, Public Health Enrollers, and Super Users can access the Analytics view. Enroller users see a more limited analytics view.

**API:** Stands for Application Programming Interface. A set of software code, processes, and tools that allows two applications to talk to each other and exchange information. The Sara Alert API makes sharing monitoree information with other systems faster.

**API Access:** Being able to use the Sara Alert API. Some Sara Alert users have API access. Administrators and Super Users in jurisdictions using the API can grant API access.

**API Enabled:** In the Sara Alert Admin Panel, shows if a user has access to the API.

**Application Programming Interface (API):** See API.

**Assigned Jurisdiction:** See jurisdiction. The public health jurisdiction under which a monitoree is being monitored.

**Assigned User:** A number indicating a specific user or group assigned to monitor a monitoree in Sara Alert. Each organization using Sara Alert may have a different plan for how this is used.

**asymptomatic line list:** A list of Exposure monitorees who do not have a Symptom Onset Date. These monitorees have not reported symptoms of the disease of interest, or have reported symptoms that a public health user determined to be not related to the disease of interest.

**audit:** Examine or review. A Sara Alert Administrator or Super User can audit user account events to see edits and logins to user accounts.

**automated report:** See report. A report is an “automated report” if it was automatically sent to a monitoree by the system, using the monitoree’s contact information in their record.

**basic search:** Using the search bar on the Sara Alert dashboard to search for a monitoree by first or last name, date of birth, or certain state, local or other federal identification numbers.

**browser:** Also called web browser. The program you use to get to the internet. Examples of browsers are Chrome, Edge, Internet Explorer, Firefox, and Safari.

**Bulk Action:** Making a change from the Sara Alert dashboard to a group of records instead of changing each record one at a time.

**Case Status:** A field in Sara Alert that shows a monitoree’s disease status for the disease of interest, based on clinical criteria. The Case Status field determines the monitoring workflow for that monitoree.

**Centers for Disease Control and Prevention (CDC):** A federal government agency under the U.S. Department of Health and Human Services whose purpose is to protect the United States from health, safety, and security threats, both foreign and domestic. Provides general guidance information for public health diseases of interest. Sara Alert is designed to align with CDC guidelines for disease monitoring.

**close contact:** The specific public health term for a person who may have been exposed to someone with a disease of interest. The CDC releases guidance for being a close contact for certain diseases. You can add basic information for a close contact to a monitoree’s Sara Alert record in the Close Contacts table. The contact’s information is in the system, but they are not a monitoree and will not receive automated reports from Sara Alert unless they are enrolled as a monitoree.

**Close Contact with a Known Case:** A risk factor documented in a monitoree’s record that indicates the monitoree may have been exposed to someone who has a known case of the disease of interest. If you enroll a close contact from a monitoree’s Close Contacts table, Sara Alert will automatically add the original monitoree’s Sara Alert ID in this field.

**closed record/closed monitoree:** A monitoree no longer being monitored by Sara Alert. Closed records will not receive automated daily reports from Sara Alert (unless they are a Head of Household with actively monitored Household members). To close a record, you can set the Monitoring Status to Not Monitoring. Exposure monitorees will automatically be closed by Sara Alert if they are on the asymptomatic line list at the end of their monitoring period.

**Contact Tracer:** A type of Sara Alert user who can enroll monitorees and view and manage line lists and workflows. Contact Tracers have all of the capabilities of a Public Health Enroller but cannot import or export data and cannot access the Analytics view.

**Continuous Exposure:** When a monitoree has ongoing exposure to someone with the disease of interest. For example, a spouse or parent may have a continuous exposure if they are caring for someone with the disease. If a monitoree has Continuous Exposure checked, the Last Date of Exposure is blank and the End of Monitoring date is listed as “Continuous Exposure.”

**CSV file:** Stands for comma-separated values file. A kind of file that saves information in a table format. You can open or use a CSV file in a spreadsheet program, such as Excel.

**disease of interest:** In Sara Alert, the disease or health condition that is being monitored to prevent it from spreading to others. COVID-19 is an example of a disease of interest that jurisdictions use Sara Alert to monitor.

**duplicate records:** Records flagged by Sara Alert as possibly representing the same monitoree you are attempting to enroll or import. Sara Alert automatically compares enrolled or imported monitoree records to monitoree records already in the system. If there is a match based on duplicate criteria, Sara Alert shows the duplicates and asks you to accept or reject the imported record.

**Enroller:** A Sara Alert user who enrolls monitorees. This kind of user can add new monitorees; view and change details of monitorees they enter; and view summary information about monitorees they enter. Enrollers cannot access other monitoree data.

**Enrollment Wizard:** A set of six pages (screens) in Sara Alert that help you enroll a monitoree.

**export:** A process used to download information from Sara Alert to a computer or system.

**exposure:** Being near or having contact with someone who has a disease of interest. Exposure does not mean a monitoree has a disease—just that they’ve been around someone who has it.

**Exposure monitoree:** A monitoree in the Exposure Workflow (see Exposure Workflow).

**Exposure Workflow (exposure monitoring):** One of two monitoring workflows in Sara Alert. Monitorees in the Exposure Workflow are suspected to have been exposed to the disease of interest. Sara Alert monitors these monitorees to see if they develop symptoms or test positive for the disease of interest and might need medical care.

**Fast Healthcare Interoperability Resources (FHIR):** See FHIR.

**FHIR:** Stands for Fast Healthcare Interoperability Resources. FHIR is a standard way for health care data to be formatted so that systems can share information. Sara Alert’s API uses FHIR to make sure other systems can understand the data that is kept in Sara Alert.

**Flag for Follow-Up:** Feature that notes a monitoree needs follow up. You can manually set a record’s follow-up flag and provide reasons for why the monitoree needs follow up.

**History:** The section of a monitoree’s record that lists:

- Changes made to the record by users or the system
- Comments added to the record by users
- The date and time when the change or comment happened
- The name of the user who made the change or comment

**Head of Household (HoH):** The monitoree who reports to Sara Alert for all monitorees in their Sara Alert Household.

**Household (HH):** A specific group of monitorees who report to Sara Alert together. The Head of Household reports for all the monitorees in the Household.

**Household member:** A monitoree who is in a Sara Alert Household. The Head of Household reports to Sara Alert for all Household members.

**import:** A process used to move information from a computer or system into Sara Alert. You can import a group of monitorees into Sara Alert at the same time, using an import guidance spreadsheet (rather than enrolling those monitorees individually using the Enrollment Wizard).

**import guidance:** Tells you how to format monitoree information to import new records into Sara Alert. For the most current import guidance, log into Sara Alert and, from the Monitoring Dashboards, click “Import,” then “Sara Alert Format,” and finally “Download Formatting Guidance.”

**isolation:** Separation of sick people with a contagious disease from people who are not sick.

**Isolation monitoree:** An individual monitored by Sara Alert in the Isolation Workflow.

**Isolation Workflow (isolation monitoring):** One of two monitoring workflows in Sara Alert. Monitorees in this workflow have the disease of interest and are monitored by Sara Alert to see when they can safely end their isolation.

**jurisdiction:** The specific area that a public health organization serves. For example, a jurisdiction for a public health organization may be a state, a territory, a tribe, a county, or a city. A jurisdiction may have sub-jurisdictions (e.g., counties within a state). In Sara Alert, “jurisdiction” determines which users can see which monitorees. Each Sara Alert user is assigned to a specific jurisdiction and can only see the monitorees who have been assigned to that jurisdiction (or any sub-jurisdictions).

**lab results:** The findings from a lab test that provide information about a person’s health. You can enter lab results for a monitoree in the “Lab Results” section of their record. A lab result may be required when creating a record for an asymptomatic case. You might use this information to rule out or confirm the disease of interest. Sara Alert may automatically move Isolation monitorees to the Records Requiring Review line list based on lab result data (and other information) to indicate that it may be safe for that monitoree to end isolation.

**line list:** A list of monitorees grouped by certain descriptors, like symptom status or reporting status. You can use line lists to easily find monitorees who need follow-up, for example, using the Non-Reporting line list to reconnect with monitorees that have not submitted a report within the expected time-period.

**manual enrollment:** When you enroll a monitoree into Sara Alert with the Enrollment Wizard. Only Enrollers, Contact Tracers, Public Health Enrollers, and Super Users can manually enroll a monitoree.

**minor:** A Sara Alert monitoree who is under 18 years old.

**monitoree:** A person who has been enrolled in Sara Alert because they have been exposed to or have an active case of a disease of interest.

**Monitoree Details:** The section of the monitoree's record that shows a monitoree's personal information, including:

- Name and address
- Contact information
- Travel information
- Exposure and/or case information

**monitoree identifying information:** Personal information about a monitoree, like name, date of birth, or address, that either independently, or in combination with other information, could be used to identify that specific individual.

**monitoree messages:** Any automated message that a monitoree could receive from the Sara Alert system. This includes:

1. The welcome message, which may be sent when the monitoree is enrolled.
2. Automated reports, which are sent regularly to ask about the monitoree's status.
3. Reminder messages, which may be sent if a monitoree has not yet submitted a report.
4. Monitoring complete messages, which may be sent when a monitoree's monitoring ends.

**monitoree record (also called record or monitoree's record):** See **record**.

**Monitoring Actions:** A section of a monitoree's record which includes information about their:

- Monitoring period, including Monitoring Status and Case Status
- Record management, including Assigned User and Assigned Jurisdiction

**monitoring complete message:** The message a monitoree gets from Sara Alert telling them that they are no longer being monitored for the disease of interest. Monitorees are only eligible to receive monitoring complete messages under certain circumstances.

**Monitoring Dashboards:** The main Sara Alert views used for managing monitorees. The Monitoring Dashboards contain a list of all the monitoree records in your jurisdiction, organized by workflow and line list. Depending on your user role, you may also be able to enroll new monitorees, import monitorees, and export monitoree data from the Monitoring Dashboards.

**Monitoring Status:** A field in Sara Alert that determines whether the record is on an active line list (Actively Monitoring) or closed (Not Monitoring).

**Non-Reporting:** A line list of monitorees who do not have a symptom onset date and have not submitted a report within the expected time-period for the disease of interest.

**Notification Status:** An icon on the dashboard and in the Reports section that notes whether the monitoree is eligible to receive an automated report from Sara Alert. If a monitoree is eligible, the icon notes when the record may receive a notification, if the monitoree has been sent a report, and/or if the monitoree has submitted a report recently.

**optional field:** A data field that can be left blank when creating or saving a monitoree record, lab result, vaccination, or close contact. While these fields may not be required in Sara Alert, they may still be crucial to your organization.

**Person(s) Under Investigation (PUI):** A monitoree being investigated (followed up with) by a health department to find out their Case Status. In Sara Alert, there is a PUI line list that you can manually move Exposure monitorees to, in order to show their disease status is being actively investigated.

**Preferred Contact Time:** A field in Sara Alert that sets the time of day (morning, afternoon, evening, or a specific hour) when the monitoree will be sent automated reports. You can set the Preferred Contact Time based on the monitoree’s preference.

**Preferred Reporting Method:** A field in Sara Alert that sets how the monitoree will receive automated reports. Reports may be sent by E-mailed Weblink, SMS-Texted Weblink, SMS Text Message or Telephone Call. If the monitoree’s contact information is not known or they do not want to be contacted, you can choose Unknown, Opt-Out, or Blank in this field.

**Public Health Enroller:** A kind of Sara Alert user who can enroll monitorees and fully access monitoree records; view and manage line lists and workflows; import, export, and transfer records; and view analytics.

**Public Health user:** A type of Sara Alert user who can fully access monitoree records; view and manage line lists and workflows; import, export, and transfer records; and view analytics. Public Health users **cannot** enroll monitorees.

**purge:** Also called system purge. The removal of monitoree identifying information from old Sara Alert records. Monitoree identifying information is personal information, like name or address, that is specific to only that monitoree. A purge happens only after a monitoree record is closed and has no changes for a specific time-period defined for the disease of interest. See the Sara Alert User Guide’s “Record Retention” section for information about which information is kept after a monitoree’s record is purged.

**quarantine:** Separating and restricting the movement of a person exposed to a contagious disease to see if they become sick. A monitoree in the Exposure workflow may be in quarantine to help prevent the spread of a disease of interest.

**quick filters:** Search bars on the Sara Alert Monitoring Dashboards used to find monitorees with a specific Assigned User or Assigned Jurisdiction.

**record:** The information in Sara Alert about a monitoree. Each record has its own Sara Alert ID number and web address. Sara Alert users can see the following information in a monitoree’s record:

- Monitoree Details
- Monitoring Actions
- Reports
- Lab Reports
- Vaccinations
- Close Contacts
- History

**record access:** A user’s ability to view a monitoree’s record in Sara Alert. Users can only access records where the Assigned Jurisdiction matches or is in the user’s jurisdiction. Some users, like Administrators and Analysts do not have access to any records.

**recovery definition:** Specific criteria involving symptoms and/or lab tests that identifies if a person can be declared as recovered from (no longer has) a disease of interest. For example, if a monitoree with COVID-19 meets specific criteria regarding his or her symptoms and has not reported a fever in the last 24 hours, public health staff may need to review the case to see if the monitoree’s isolation can end. Recover definitions for the disease being monitored are built-in to

the Isolation workflow. Cases that meet recovery definition criteria appear on the Records Requiring Review line list.

**reminder message:** An automated telephone call Sara Alert will place to a monitoree if the monitoree did not answer an earlier automated call from Sara Alert that day.

**report:** The questionnaire asking about a monitoree’s status (including symptoms). Reports may be sent to the monitoree automatically via their Preferred Reporting Method (**automated report**), or manually entered by a user.

**required field:** A field in Sara Alert that you cannot leave blank when enrolling a monitoree or when saving a lab result, close contact, vaccination, or other data item. In Sara Alert, required fields have an asterisk (\*) next to them.

**review:** A user’s ability to mark a monitoree’s symptomatic report in the Reports table to show that you have reviewed it and found that it is not related to the disease of interest. You can review all reports at once using the “Mark All as Reviewed” button.

**SMART:** Stands for Substitutable Medical Applications, Reusable Technologies. A SMART healthcare application is designed to work with any data system at any healthcare organization, even with electronic health records (EHRs). With SMART, healthcare computer systems can share information with each other. Sara Alert’s API uses SMART standards.

**Super User:** A kind of Sara Alert user who has all the capabilities of both a Public Health Enroller and Administrator. Super Users are typically the top-level users in their jurisdiction.

**Symptom Onset Date:** The first date that a monitoree reported symptoms related to the disease of interest. For Exposure monitorees, the Symptom Onset Date will automatically be generated as the date of their first unreviewed symptomatic report. A user can also manually set the Symptom Onset Date for a monitoree. Exposure monitorees with a Symptom Onset Date will appear on the Symptomatic line list. For Isolation monitorees, the Symptom Onset Date may be used to help determine if a monitoree can safely discontinue isolation.

**symptomatic logic:** Determines if a monitoree has reported symptoms that are consistent with the defined logic for a disease of interest. If a monitoree submits a daily report that meets the symptomatic logic, that report will be highlighted in red in the Reports table with a “Yes” in the Needs Review column. If the monitoree did not have a Symptom Onset Date, that date will be populated with the date of the earliest symptomatic report. If a monitoree’s most recent report met the symptomatic logic, that monitoree will have a red “alert” icon in their Latest Report column on the Monitoring Dashboards. Exposure monitorees who have submitted an unreviewed symptomatic report (see “review”) will appear on the symptomatic line list.

**Symptomatic line list:** A list of Exposure monitorees who have a Symptom Onset Date. Exposure monitorees who are on the Asymptomatic or Non-Reporting line list are automatically moved to the Symptomatic line list when they gain a Symptom Onset Date. These monitorees require follow up from public health to confirm if the disease of interest is suspected.

**symptomatic report:** A report that meets the symptomatic logic and has not been reviewed (see “review”).

**system purge:** See purge.



**temporary password:** A password that your local administrator sends you to first log in to Sara Alert or if you have had your password reset. It is valid for 72 hours. After using it, you will be prompted to change your password. Make sure to manually type in your temporary password when logging in, as copying and pasting may not work.

**timestamp:** The date and time of an event recorded in Sara Alert.

**toggle:** Changing an “on/off” switch in Sara Alert to either “on” or “off.”

**token:** In the Two-Factor Authorization security for Sara Alert, the seven-digit number sent to your phone to use as part of your log in. Sometimes called a “pin.”

**tooltip:** A question mark icon that shows in certain places in Sara Alert. When you hover your cursor over a tooltip (stop your mouse over it), it gives tips and other information on that area or field.

**transfer:** Moving a monitoree’s record to a different jurisdiction.

**Two-Factor Authentication (2FA):** See 2FA.

**user:** A person who has a Sara Alert account.

**user interface:** The Sara Alert system as it appears to a user. Includes all the different dashboards, panels, and views that a user sees and interacts with when using Sara Alert.

**user role:** Also called “user type.” It defines what a Sara Alert user can do in the system and what kinds of information they can see and use. Sara Alert user roles include: Enrollers, Administrators, Analysts, Public Health users, Public Health Enrollers, Contact Tracers, and Super Users.

**username:** The unique email address that identifies a specific Sara Alert user. A user logs in using their username, which must be an email address they have access to.

**UTC:** Stands for Universal Coordinated Time and is the primary time standard for other time zones. Sara Alert exports dates and timestamps and flags records for purge in UTC. Sara Alert does a system purge each Saturday at 11:59 p.m. UTC. Use this chart to convert UTC time to your time zone:

Time Zone	Standard Time	Daylight Time
Alaska Time	Saturday, 2:59 p.m. AKST	Saturday, 3:59 p.m. AKDT
Arizona Mountain Time	Saturday, 4:59 p.m. MST	None (Same as Standard Time)
Atlantic Time	Saturday, 7:59 p.m. AST	Saturday, 8:59 p.m. ADT
Central Time	Saturday, 5:59 p.m. CST	Saturday, 6:59 p.m. CDT
Chamorro Time	Sunday, 9:59 a.m. ChST	None (Same as Standard Time)
Eastern Time	Saturday, 6:59 p.m. EST	Saturday, 7:59 p.m. EDT
Hawaiian-Aleutian Time	Saturday, 1:59 p.m. HAST	Saturday, 2:59 p.m. HADT
Mountain Time	Saturday, 4:59 p.m. MST	Saturday, 5:59 p.m. MDT
Pacific Time	Saturday, 3:59 p.m. PST	Saturday, 4:59 p.m. PDT
Palau Time	Sunday, 8:59 a.m. PWT	None (Same as Standard Time)
Samoa Time	Sunday, 12:59 pm SST	None (Same as Standard Time)

**Vaccinations:** A vaccination is the administration of a vaccine. In Sara Alert, the Vaccinations table in a monitoree's record shows any vaccinations that have been documented by a user. If a monitoree's vaccination record is important to a jurisdiction's protocols for the disease of interest, you can enter them in the Vaccinations table.

**view:** One of five system views in Sara Alert. The five views are: Monitoring Dashboards, Analytics, Admin Panel, Enroller Dashboard, Enroller Analytics. Each view serves a different function. For example, the Monitoring Dashboards let you view and manage monitorees, while the Admin Panel lets you manage users. Different user roles can access different views.

**welcome message:** The message a monitoree gets when they first enroll in Sara Alert. They receive the message via their Preferred Reporting Method (E-mailed Web Link, SMS-Texted Weblink or SMS Text Message). A monitoree who chooses Telephone Call as their Preferred Reporting Method does not get a welcome message.

**window:** A pop-up in Sara Alert that gives more information, asks for confirmation, or prompts you to update additional fields to complete an action.

**workflow:** See Exposure Workflow and Isolation Workflow.