



Sara Alert TM
Secure monitoring and reporting for public health

User Guide for Enrollers

Software Version 1.44
April 19, 2022

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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

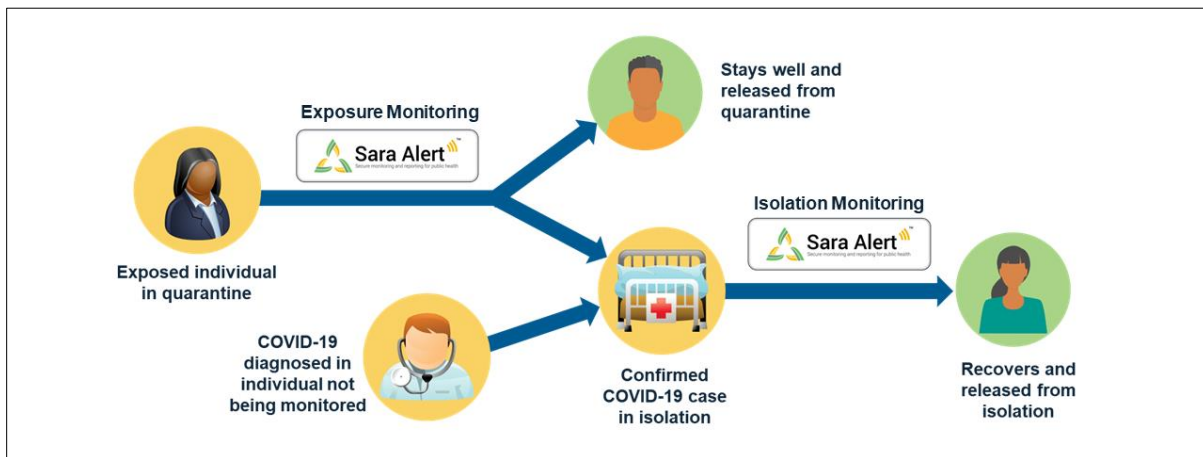


Figure 1: Sara Alert™ Concept of Operations

1.2 Workflow Summary

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

- **Exposure Monitoring Workflow:** allows public health to monitor **potentially exposed** individuals to determine if they become ill; for COVID-19 the monitoring period is 10 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.

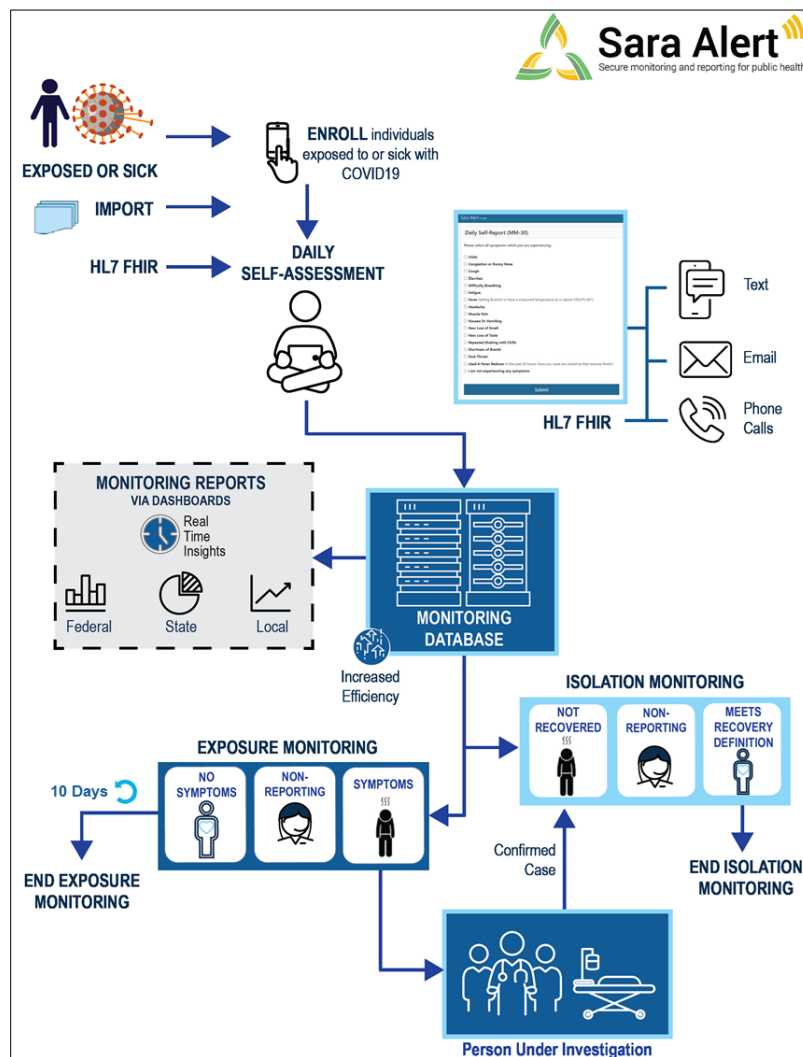


Figure 2. Sara Alert™ Workflow Summary

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.

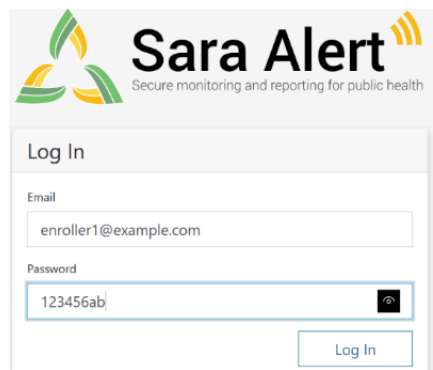
The image shows the Sara Alert login interface. At the top is the Sara Alert logo, which consists of three stylized leaves in green and yellow, followed by the text "Sara Alert" and the tagline "Secure monitoring and reporting for public health". Below the logo is a "Log In" section. It contains two input fields: "Email" with the placeholder text "enroller1@example.com" and "Password" with the placeholder text "123456ab". To the right of the password field is a small icon of a person. At the bottom right of the login section is a "Log In" button.

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.**"

The image shows the Sara Alert registration interface for 2-Factor Authentication. At the top is the Sara Alert logo, which consists of three stylized leaves in green and yellow, followed by the text "Sara Alert" and the tagline "Secure monitoring and reporting for public health". Below the logo is a "Register For 2-Factor Authentication" section. It contains two input fields: "Enter your country" and "Enter your cellphone #". To the right of these fields is a "Register" button.

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.

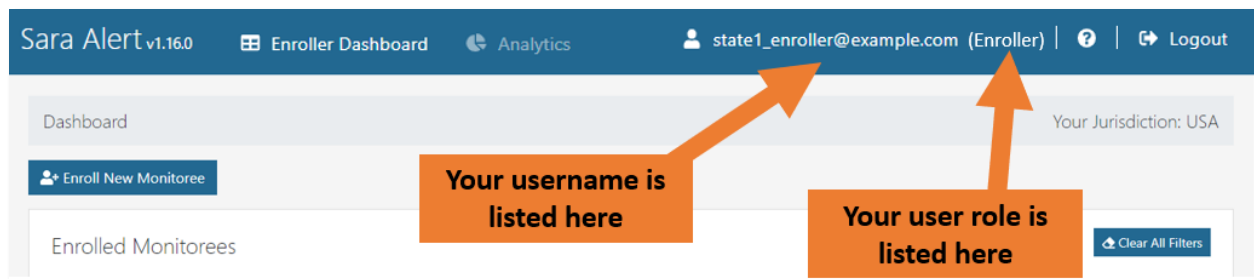


Figure 6: Your Sara Alert™ username and user role

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.

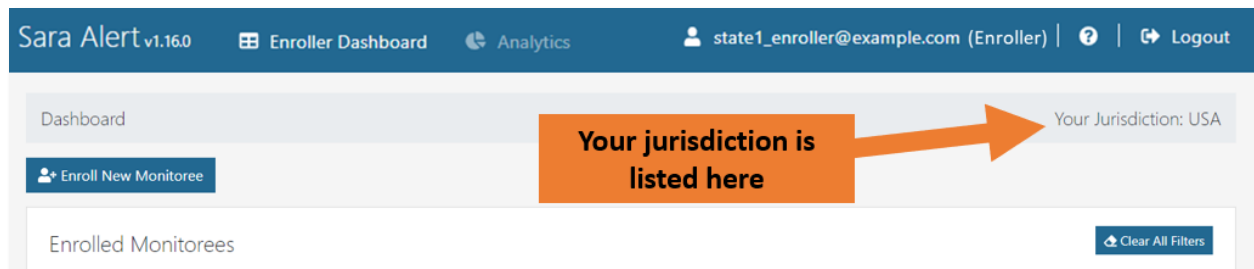


Figure 7: Your Sara Alert™ jurisdiction

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.

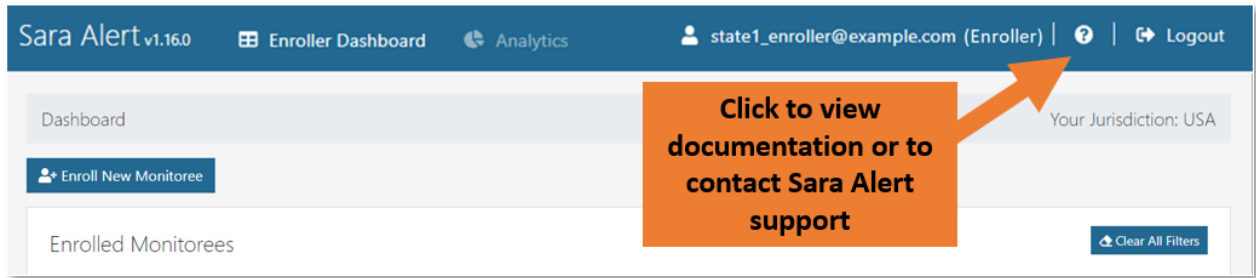


Figure 8: Access to Sara Alert™ resources

9) To end the session, click “**Logout.**” Be sure to log out of the system when you’re not using it. You will automatically be logged out of Sara Alert after 24 hours of inactivity in the system.

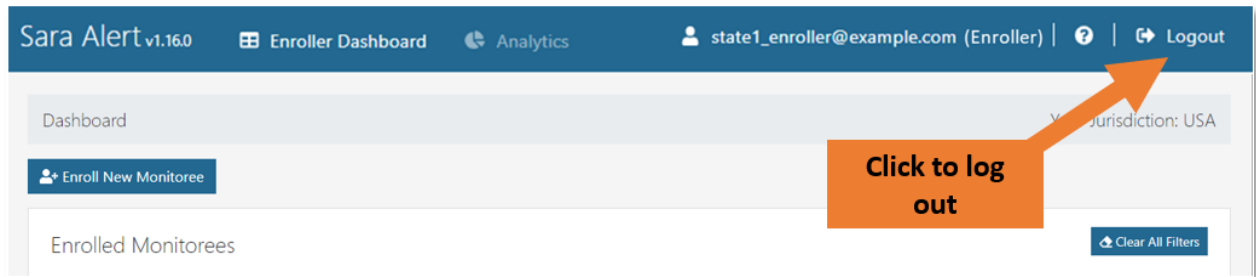


Figure 9: The logout button

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 Monitoree Address

- Home Address Within USA (U.S. Residents)
 - Address at Destination in USA Where Monitored: If this is the same as the home address, select “**Copy from Home Address.**”
- Home Address Outside USA (Non-Residents)
 - Address at Destination in USA Where Monitored: Enter information for monitorees who are temporarily staying in the U.S. during their monitoring period.

4.3 Monitoree Contact Information

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

4.3.1.1 Primary Contact

Sara Alert uses the information listed in the Primary Contact tab to send notifications to the monitoree.

- “**Contact Relationship Type**” indicates the relationship between the monitoree and the Primary Contact for monitoring (self, parent/guardian, spouse partner, caregiver, etc.). For self-reporters, use the “Self” option (this field will default to “Self” when you enroll a monitoree using the “Enroll” button. If you enroll a new household member for an existing monitoree, this field will default to “Unknown” (but may be changed) and the Primary Contact information will pre-populate with the Head of Household’s Primary Contact information.

- **“Contact Name”** indicates the name of the individual who owns the contact information listed. This field is only available for monitorees with a “Contact Relationship Type” value that is not “Self.”
- **“Preferred Reporting Method”** indicates how monitorees receive notifications to submit daily reports (by email, text, or voice call).
 - Some fields are required, depending on the selected “Preferred Reporting Method.”
 - Message and data rates may apply depending on the contact method.
 - If you don’t know the monitoree’s preferred reporting method, select **Unknown**, and the monitoree will not receive notifications. This is the system default value.
 - If the monitoree is enrolled in the system but has asked not to receive notifications, select **Opt-Out** for the preferred reporting method, and the monitoree will not receive notifications.
 - If you try to enter a phone number that is blocking Sara Alert™ texts, you’ll see a warning message in the monitoree’s record. See **page 33** 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: If “Unknown” or “Opt-Out” is the selected, update the reporting method (email, text, or phone) to start daily messages to the monitoree.

NOTE: If the monitoree’s **Preferred Reporting Method** and corresponding contact information (**phone number or email address**) matches another record that you have access to, the system links the two records as a reporting household. See **page 26** for instructions on how to remove a record from a household.

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

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

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

4.3.1.2 Alternate Contact

Sara Alert will not use the information listed in the Alternate Contact tab to message monitorees. The fields in this tab are optional and can be used to capture additional contact information about a monitoree’s alternate monitoring contact for user reference.

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.
 - Once a Last Date of Exposure is entered, the system calculates the end of the monitoring period. For COVID-19, the monitoring period ends 10 days after the Last Date of Exposure.
 - 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 10 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**” table to track up to ten different shared exposures (group home, workplace, etc.). Users can enter information on the cohort type, name/description, and location.

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 the start of the isolation monitoring period for symptomatic cases, as well as if the *symptomatic 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 the start of the isolation monitoring period for asymptomatic cases, as well as 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.
- The **Risk Assessment** field represents the risk assessment of the monitoree's exposure to disease based on CDC or local guidance.
 - This field is optional and can be updated later.
 - This field does not impact the type or frequency of messages sent by the system, it is intended to help jurisdictions prioritize responses to symptomatic and non-reporting individuals.
- The **Monitoring Plan** field represents the monitoring approach selected by public health based on CDC or local guidance.
 - The field is optional and can be updated later.
 - This field does not impact the type or frequency of messages sent by the system, it is intended to help jurisdictions prioritize responses to symptomatic and non-reporting individuals.

5 ENROLLER CAPABILITIES

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

- 1) Click the “Enroll New Monitoree” button.

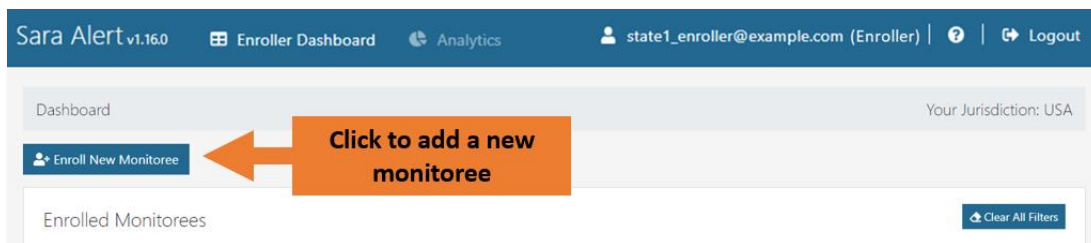


Figure 10: Enroll new monitoree

- 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.

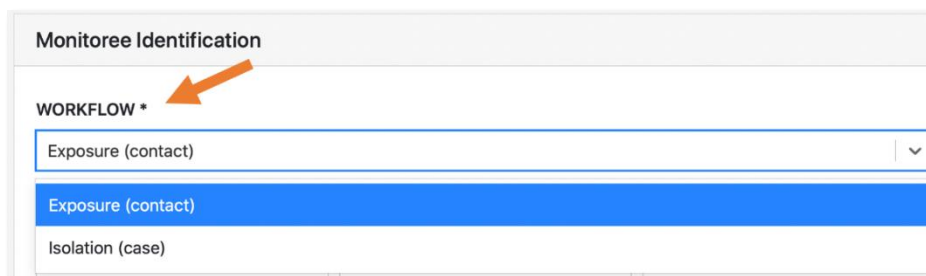


Figure 11: Select Exposure or Isolation workflow

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.

The screenshot shows the 'Monitoree Identification' form. It includes fields for WORKFLOW (Exposure (contact)), FIRST NAME (Donald), MIDDLE NAME(S), LAST NAME (Duck), DATE OF BIRTH (01/01/1970), AGE (51), SEX AT BIRTH, GENDER IDENTITY, SEXUAL ORIENTATION, RACE (checkboxes for White, Black or African American, American Indian or Alaska Native, Asian, Native Hawaiian or Other Pacific Islander, Other, Unknown, Refused to Answer), ETHNICITY, LANGUAGE (Primary and Secondary), INTERPRETATION REQUIRED, NATIONALITY, STATE/LOCAL ID, CDC ID, and NNDSS LOC. REC. ID/CASE ID. An orange callout box with the text 'Click “Next” to advance to the next section' has an arrow pointing to the 'Next' button at the bottom right.

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.

The screenshot shows the 'POTENTIAL EXPOSURE INFORMATION' and 'NOTES' section. The exposure information includes Last Date of Exposure (12/05/2020), Exposure Location (Unknown), and Exposure Country. The risk factors section shows 'Member of a C' and 'AA'. An orange callout box with the text 'Click “Edit” to edit that section' has an arrow pointing to the 'Edit' link above the exposure information. Another orange callout box with the text 'Click “Finish” to save the record' has an arrow pointing to the 'Finish' button at the bottom. The bottom of the form has buttons for 'Previous', 'Finish and Add a Household Member', 'Finish', and 'Cancel'.

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.

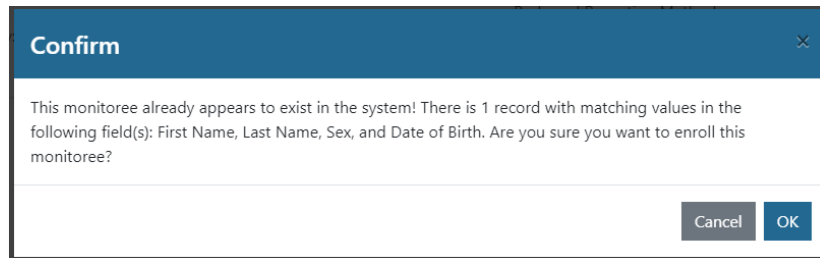


Figure 14: A confirmation box will appear for potential duplicate records

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.

You can use two different types of searches to find monitoree records you've enrolled:

1. **Basic Search**
2. **Dashboard Quick Filters:** You can filter records from the dashboard by Jurisdiction or Assigned user

You can use both types of search features at the same time. The dashboard will only show monitorees that meet ALL the active search parameters and filters. When filters are applied, the number of records that meet the current parameters appears at the bottom of the page.

If you enter a search term or set one of the quick filters, then open a record and later return to the dashboard, the search or filter you had set will still be active. You can clear all active filters and searches by clicking the "Clear All Filters" button. This will also reset the number of records shown to 25.

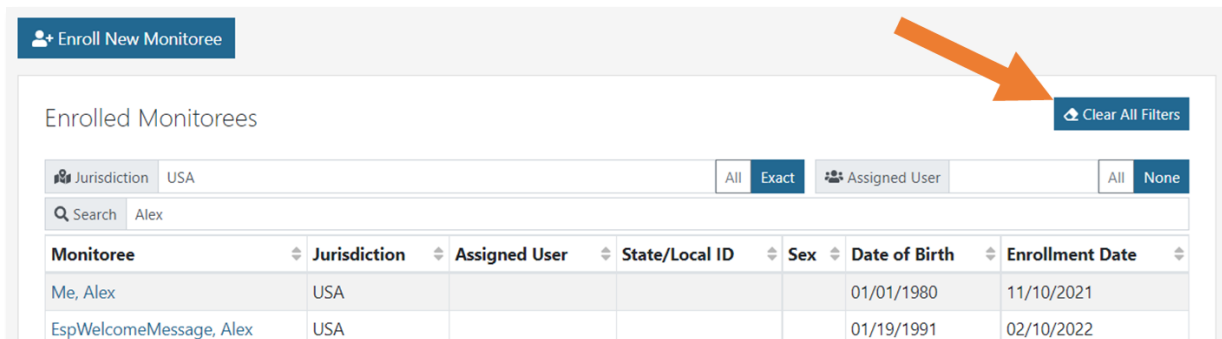


Figure 15: Click "Clear All Filters" to remove all filters

5.2.1.1 Basic Search

You can use the “Search” bar to find records that match search terms for any of the following:

- First Name
- Last Name
- Date of Birth (format: YYYY-MM-DD)
- State/Local ID
- Primary Contact Primary Telephone Number
- Primary Contact Email Address
- NNDSS/Case ID
- CDC ID

Once you have entered a search term, the dashboard will only show records where there is a match for what you entered in any of the fields listed above.

5.2.1.2 Filter by Assigned User or Jurisdiction (Dashboard Quick Filters)

You can also filter monitorees based on jurisdiction and user assignment directly from the dashboard.

To filter by Jurisdiction:

- Enter the Jurisdiction of interest in the **Jurisdiction** field, OR select the jurisdiction from the drop-down menu
 - The drop-down menu will auto-populate with sub-jurisdictions as you type
 - Click the “**All**” button to include all sub-jurisdictions within the jurisdiction you entered
 - Click the “**Exact**” button to filter for only monitorees in exactly the jurisdiction you select (i.e., does not include sub-jurisdictions)

To filter by Assigned User:

- Enter your Assigned User number in the **Assigned User** field, OR select the number from the drop-down menu
 - The drop-down menu will auto-populate with assigned user numbers that contain the value you entered
 - Click the “**All**” button to clear the current Assigned User filter
 - Click the “**None**” button will clear the current Assigner User filter and show only monitorees where the Assigned User field is blank

Enrolled Monitorees Clear All Filters

Jurisdiction USA, State 46 All Exact Assigned User 343 All None

Search

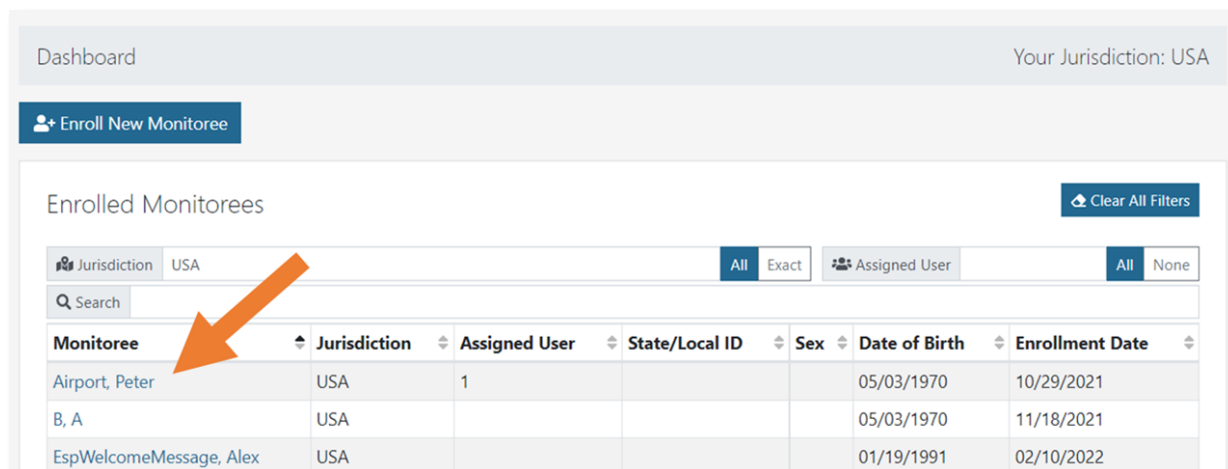
Monitoree	Jurisdiction	Assigned User	State/Local ID	Sex	Date of Birth	Enrollment Date
test, welcomemessagetest	State 46	343			04/20/2000	09/29/2021

Figure 16: Search and/or sort by jurisdiction and user assignment

5.3 How to Edit Monitoree Enrollment Information

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

- 1) To open a record, click on the monitoree's name in the “**Monitoree**” column.



Dashboard Your Jurisdiction: USA

[Enroll New Monitoree](#)

Enrolled Monitorees [Clear All Filters](#)

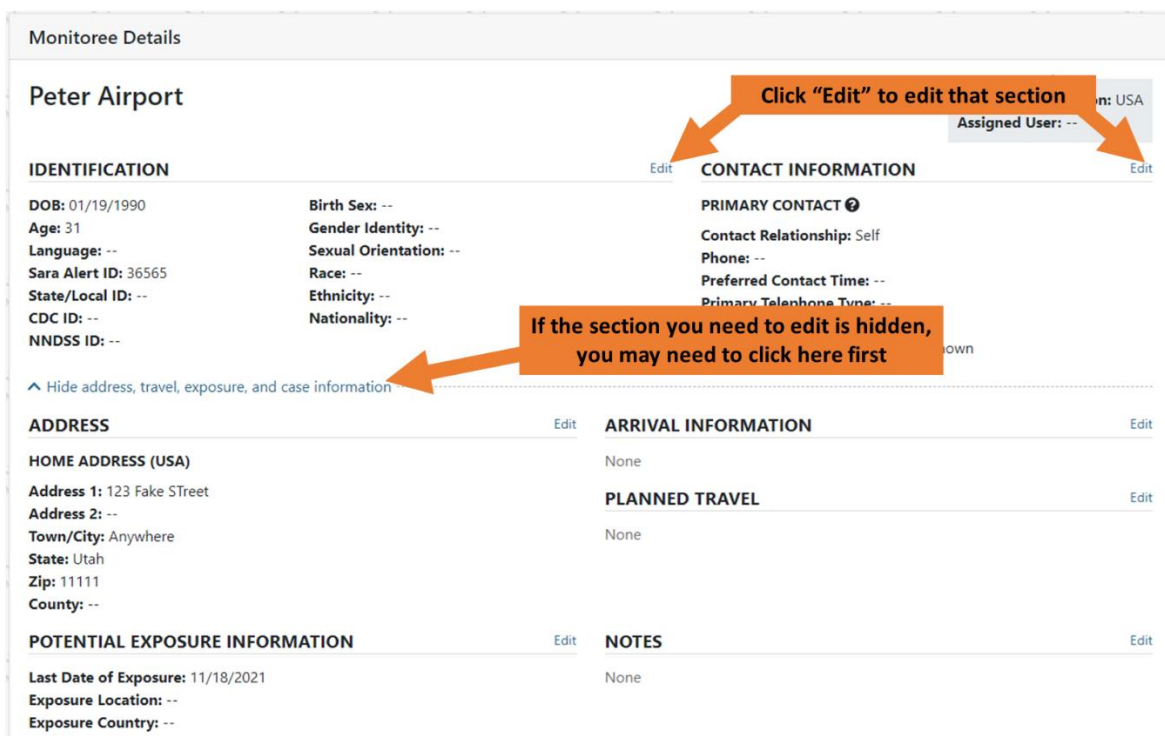
Jurisdiction: USA All Exact Assigned User: All None

Search

Monitoree	Jurisdiction	Assigned User	State/Local ID	Sex	Date of Birth	Enrollment Date
Airport, Peter	USA	1			05/03/1970	10/29/2021
B, A	USA				05/03/1970	11/18/2021
EspWelcomeMessage, Alex	USA				01/19/1991	02/10/2022

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.



Monitoree Details

Peter Airport

Assigned User: -- Edit

IDENTIFICATION Edit

DOB: 01/19/1990 Birth Sex: --
 Age: 31 Gender Identity: --
 Language: -- Sexual Orientation: --
 Sara Alert ID: 36565 Race: --
 State/Local ID: -- Ethnicity: --
 CDC ID: -- Nationality: --
 NNDSS ID: --

CONTACT INFORMATION Edit

PRIMARY CONTACT

Contact Relationship: Self
 Phone: --
 Preferred Contact Time: --
 Primary Telephone Type: --

ADDRESS Edit

HOME ADDRESS (USA)
 Address 1: 123 Fake Street
 Address 2: --
 Town/City: Anywhere
 State: Utah
 Zip: 11111
 County: --

POTENTIAL EXPOSURE INFORMATION Edit

Last Date of Exposure: 11/18/2021
 Exposure Location: --
 Exposure Country: --

ARRIVAL INFORMATION Edit

None

PLANNED TRAVEL Edit

None

NOTES Edit

None

[Hide address, travel, exposure, and case information](#)

Callouts:

- Click “Edit” to edit that section
- If the section you need to edit is hidden, you may need to click here first

Figure 18: Modify monitoree record

5.3.1 How to Add a Common Exposure Cohort

Users can document a monitoree's shared exposure groups (e.g., a workplace, facility, event, etc.) using the Common Exposure Cohort feature.

- 1) To add a Common Exposure Cohort, first open the monitoree's record and expand the Monitoree Details section by clicking "Show address, travel, exposure, and case information."

Monitoree Details

Peter Airport

Assigned Jurisdiction: USA
Assigned User: --

IDENTIFICATION Edit

DOB: 01/19/1990
Age: 31
Language: --
Sara Alert ID: 36565
State/Local ID: --
CDC ID: --
NNDSS ID: --

Birth Sex: --
Gender Identity: --
Sexual Orientation: --
Race: --
Ethnicity: --
Nationality: --

CONTACT INFORMATION Edit

PRIMARY CONTACT

Contact Relationship: Self
Phone: --
Preferred Contact Time: --
Primary Telephone Type: --
Email: --
Preferred Reporting Method: Unknown

[Show address, travel, exposure, and case information](#)

Click to expand Monitoree Details

Figure 19: Open the monitoree's record and expand the Monitoree Details section

- 2) Select "Edit" next to "Potential Exposure Information"

POTENTIAL EXPOSURE INFORMATION

Last Date of Exposure: 10/06/2021
Exposure Location: --
Exposure Country: --

[Edit](#)

Click "Edit" next to Potential Exposure Information

Figure 20: Select "Edit"

- 3) In the "Exposure Risk Factors" section and select "Add New Cohort".

Monitoree Potential Exposure Information

LAST DATE OF EXPOSURE * ⓘ EXPOSURE LOCATION EXPOSURE COUNTRY

10/06/2021 X

☐ CONTINUOUS EXPOSURE ⓘ

EXPOSURE RISK FACTORS (USE COMMAS TO SEPARATE MULTIPLE SPECIFIED VALUES)

☒ CLOSE CONTACT WITH A KNOWN CASE enter case ID

☐ TRAVEL FROM AFFECTED COUNTRY OR AREA

☐ WAS IN HEALTHCARE FACILITY WITH KNOWN CASES enter facility name

☐ LABORATORY PERSONNEL enter facility name

☐ HEALTHCARE PERSONNEL enter facility name

☐ CREW ON PASSENGER OR CARGO FLIGHT

☒ MEMBER OF A COMMON EXPOSURE COHORT

[Add New Cohort](#)

Select "Add New Cohort"

Figure 21: Select the toggle and click "Add New Cohort"

4) Update fields with available data. You will need to input information into a minimum of one Common Exposure Cohort field to add an entry. Click “Save”.

Figure 22: Enter Cohort data and click “Save”

5) Click “Next” and “Finish” to save your additions to the monitoree’s record. Additions and changes to the Common Exposure Cohort table **will not be saved** until you select “Next” and “Finish”. If a record has at least one Cohort table, the “Member of a Common Exposure Cohort” toggle will be enabled.

Figure 23: You must click “Next” and “Finish” to save any updates to the table

6) To edit a Common Exposure Cohort, click the “Edit” icon. Remember to click “Next” and “Finish” to save your updates to the Monitoree Details.

Figure 24: Click the “edit” icon to update an existing Cohort entry

7) To delete a Common Exposure Cohort, click the “Delete” icon and select “OK”. Remember to click “Next” and “Finish” to save your updates to the Monitoree Details.

The screenshot shows a table with the following columns: Cohort Type, Cohort Name/Description, and Cohort Location. The first row contains the text: Healthcare Facility, Example for User Guide, and Example for User Guide. Below the table is a button labeled 'Add New Cohort'. To the right of the table, an orange callout box with an arrow pointing to a trash can icon contains the text: 'Click the “Delete” icon to remove a Cohort entry from the table'.

Figure 25: Click the “delete” icon to remove an existing Cohort entry

5.4 How to Create a Reporting Household During Enrollment

Sara Alert allows a group of monitorees to **report symptoms as a single household unit called a “Household.”** If they choose to do this, the system links their records and contacts only the person chosen as Head of Household (HoH). The HoH agrees to report daily symptom information for all monitorees in the Household. If 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 22**) in the system.

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](#).

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

1) Enroll the HoH as you would a monitoree (see **page 12**).

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.

The screenshot shows the 'POTENTIAL EXPOSURE' screen with the following fields: Last Date of Exposure: 10/19/2020, Exposure Location: West Vesta, Exposure Country: North Mariana Islands, and Risk Factors: MEMBER OF A COMMON EXPOSURE COHORT: Match. At the bottom are four buttons: Previous, Finish and Add a Household Member, Finish, and Cancel. Two orange callout boxes are present: one above the 'Finish and Add a Household Member' button with the text 'Click to save this record and add another monitoree' and an arrow pointing to the button, and another to the right with the text 'The subsequent monitoree will be added to a household with the first monitoree as Head of Household'.

Figure 26: Create a reporting household during enrollment

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

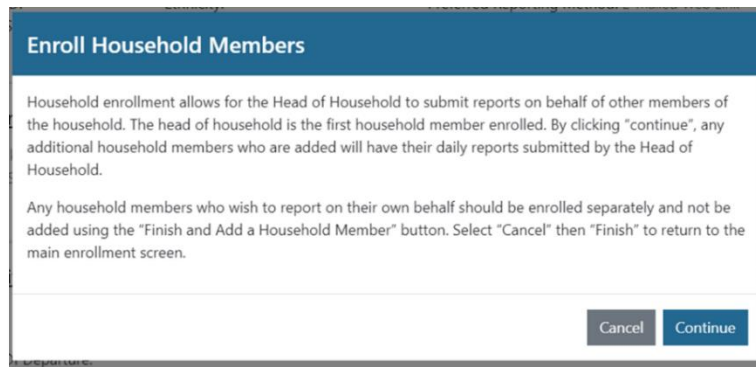


Figure 27: Note how Sara Alert™ handles household enrollment

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**.

If a HoH’s Contact Relationship is “Self,” their household member’s Primary Contact Name will be pre-populated with the HoH’s name. If a HoH’s Contact Relationship is a value other than “Self,” their household member’s Primary Contact Name will be pre-populated the HoH’s Primary Contact Name. These values can be edited, if different among household members, in each of the data entry screens or by clicking “**Edit**” at the monitoree review screen.

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.

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

Monitoree Details

Pepperoni Airport

Assigned Jurisdiction: USA, State 49
Assigned User: 12345

IDENTIFICATION Edit

DOB: 01/01/1976 Birth Sex: --
Age: 45 Gender Identity: --
Language: -- Sexual Orientation: --
Sara Alert ID: 36484 Race: --
State/Local ID: -- Ethnicity: --
CDC ID: -- Nationality: --
NNDSS ID: --

CONTACT INFORMATION Edit

PRIMARY CONTACT
Contact Type: Unknown
Contact Name: Peter Airport
Phone: --
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: 123 User Guide Example
Address 2: --
Town/City: Example
State: Tennessee
Zip: 11111
County: --

ARRIVAL INFORMATION Edit

DEPARTED	ARRIVAL
Port of Origin: London	Port of Entry: Washington D.C.
Date of Departure: 10/26/2021	Date of Arrival: 10/27/2021
Carrier: --	

ADDITIONAL PLANNED TRAVEL Edit

Type: Domestic
Place: Ohio
Port of Departure: --
Start Date: 11/03/2021
End Date: --

POTENTIAL EXPOSURE INFORMATION Edit

Last Date of Exposure: 10/06/2021
Exposure Location: --
Exposure Country: --

RISK FACTORS
None specified

NOTES Edit

User Guide Screenshot

This monitoree is a member of the following Household where the reporting responsibility is handled by the designated Head of Household:

Name	Date of Birth	Workflow	Monitoring Status	Continuous Exposure?
Airport, Peter	01/01/2000	Exposure	Actively Monitoring	No
Airport, Person	01/01/2000	Exposure	Actively Monitoring	No

Remove From Household

Figure 28: Sara Alert™ Automatically Pre-Populates Information for Household Members

- 5) To enroll more Household members, click **“Finish and Add Household Member”** at the bottom of the **Monitoree Review** screen. Repeat steps 3-5 for all remaining Household members.
- 6) After enrolling the last Household member, click **“Finish”** at the bottom of the **Enrollment Review** screen.

POTENTIAL EXPOSURE INFORMATION Edit

Last Date of Exposure: 10/19/2020
Exposure Location: West Vesta
Exposure Country: Northern Mariana Islands

RISK FACTORS
Member of a Common Exposure Cohort Match

NOTES Edit

sdgsdfadgafddddd

Click to save the record and add stop enrolling new household members

Previous Finish and Add a Household Member Finish Cancel

Figure 29: 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.

Monitoree Details
Pepperoni Airport

Assigned Jurisdiction: USA, State 49
Assigned User: 12345

IDENTIFICATION Edit

DOB: 01/01/1976
Age: 45
Language: --
Sara Alert ID: 36484
State/Local ID: --
CDC ID: --
NNDSS ID: --

Birth Sex: --
Gender Identity: --
Sexual Orientation: --
Race: --
Ethnicity: --
Nationality: --

CONTACT INFORMATION Edit

PRIMARY CONTACT ⓘ
Contact Type: Unknown
Contact Name: Peter Airport
Phone: --

▼ Show address, travel, exposure, and case information

This monitoree is a member of the following Household where the reporting responsibility is handled by the designated Head of Household:

Name	Date of Birth	Workflow	Monitoring Status	Continuous Exposure?
Airport, Peter	01/01/2000	Exposure	Actively Monitoring	No
Airport, Person	01/01/2000	Exposure	Actively Monitoring	No

Remove From Household

Figure 30: 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.

NNDSS ID: 999999 Nationality: --

▼ Show address, travel, exposure, and case information

This monitoree is responsible for handling the household members:

Name	Workflow	Monitoring Status	Continuous Exposure?
Badger, Bucky	Exposure	Actively Monitoring	No
White, Holly	Exposure	Actively Monitoring	No

Change Head of Household

Figure 31: 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.

Edit Head of Household

Select The New Head Of Household

Note: The selected monitoree will become the responder for the current monitoree and all others within the list

--

Badger, Bucky

Figure 32: Select the preferred Head of Household

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

3) Click **“Update”** to save the new HoH.

Figure 33: Click Update to save the Head of Household

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

1) Open one of these records:

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

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

Figure 34: 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 17.

5.7 How to Move an Existing Record into a Reporting Household

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

1) Open the monitoree record and click the “**Move to Household**” button.

Monitoree Details

Morpheus L Fishburne Assigned Jurisdiction: USA, State 46
Assigned User: 10

IDENTIFICATION		CONTACT INFORMATION
DOB: 07/30/1961 Age: 59 Language: English Sara Alert ID: 6951 State/Local ID: GA CDC ID: 23423465 NNDSS ID: 466	Birth Sex: Male Gender Identity: Male (Identifies as male) Sexual Orientation: Straight or Heterosexual Race: Black or African American Ethnicity: Not Hispanic or Latino Nationality: matrix	PRIMARY CONTACT Contact Type: Unknown Contact Name: -- Phone: 770-700-0000 Preferred Contact Time: Morning Primary Telephone Type: -- Email: -- Preferred Reporting Method: Telephone call

▼ Show address, travel, & other information

This monitoree is not a member of a household.

[Move To Household](#)
[Enroll Household Member](#)

Figure 35: 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)
 - Primary Contact Email Address
 - Primary Contact Primary Telephone Number
 - State/Local ID
 - NNDSS/Case ID
 - Sara Alert ID
- 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.

Move To Household

Please select the new monitree that will respond for **Testudo Terrapin**.

You may select from the provided existing Head of Households and monitrees who are self reporting. Testudo Terrapin will be immediately moved into the selected monitree's household.

Search for a monitree by name, ID, or DOB

Search

Monitree	State/Local ID	Jurisdiction	Date of Birth	
Terrapin, Testudo		USA	2001-01-01	Select
TTest, Test Exposre			1950-01-01	Select
HistoryNotifs, Testing	HoH		1990-01-01	Select
HistoryNotifs3, Testing		USA	2010-01-05	Select
Test1r110, Test1		USA	1990-03-08	Select

Click to sort that column

Can display up to 10 rows per page

Click to navigate to other pages

Showing 5 out of 4704 rows.

Previous 1 2 3 4 5 ... 941 Next

Cancel

Figure 36: Search for monitrees 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.

Move To Household

Please select the new monitree that will respond for **Testudo Terrapin**.

You may select from the provided existing Head of Households and monitrees who are self reporting. Testudo Terrapin will be immediately moved into the selected monitree's household.

Search

Monitree	State/Local ID	Jurisdiction	Date of Birth	
Terrapin, Testudo		USA	2001-01-01	Select
TTest, Test Exposre		USA		Select
HistoryNotifs, Testing	HoH	USA	1990-01-01	Select
HistoryNotifs3, Testing		USA	2010-01-05	Select
Test1r110, Test1		USA	1990-03-08	Select

Click to add the current monitree

Showing 5 out of 4704 rows.

Previous 1 2 3 4 5 ... 941 Next

Cancel

Figure 37: Click “Select” to move the monitree into the selected Household.

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

Monitoree Details

Pepperoni Airport

Assigned Jurisdiction: USA, State 49
Assigned User: 12345

IDENTIFICATION Edit

DOB: 01/01/1976
Age: 45
Language: --
Sara Alert ID: 36484
State/Local ID: --
CDC ID: --
NNDSS ID: --

Birth Sex: --
Gender Identity: --
Sexual Orientation: --
Race: --
Ethnicity: --
Nationality: --

CONTACT INFORMATION Edit

PRIMARY CONTACT ⓘ

Contact Type: Unknown
Contact Name: Peter Airport
Phone: --
Preferred Contact Time: Afternoon
Primary Telephone Type: Landline
Email: --
Preferred Reporting Method: Unknown

▼ Show address, travel, exposure, and case information

This monitoree is a member of the following Household where the reporting responsibility is handled by the designated Head of Household:

Name	Date of Birth	Workflow	Monitoring Status	Continuous Exposure?
Airport, Peter	01/01/2000	Exposure	Actively Monitoring	No
Airport, Person			Actively Monitoring	No

Remove From Household

Click the Head of Household's name to view their record

Figure 38: The selected HoH is now responsible for reporting on behalf of the monitoree

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

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

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

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

Monitoree Details

Morpheus L Fishburne

Assigned Jurisdiction: USA, State 46
Assigned User: 12345

IDENTIFICATION Edit

DOB: 07/30/1961
Age: 59
Language: English
Sara Alert ID: 6951
State/Local ID: GA
CDC ID: 23423465
NNDSS ID: 466

Birth Sex: Male
Gender Identity: Male (Identifies as male)
Sexual Orientation: Straight or Heterosexual
Race: Black or African American
Ethnicity: Not Hispanic or Latino
Nationality: matrix

CONTACT INFORMATION Edit

PRIMARY CONTACT ⓘ

Contact Type: Parent/Guardian
Contact Name: Ron Berry
Phone: 770-700-0000
Preferred Contact Time: Morning
Primary Telephone Type: --
Email: --
Preferred Reporting Method: Telephone call

ALTERNATE CONTACT ⓘ

Contact Type: Parent/Guardian
Contact Name: Neo Reeves
Phone: 222-222-2222
Preferred Contact Time: Morning
Primary Telephone Type: Smartphone
Email: --
Preferred Reporting Method: Telephone call

Click here to edit the monitoree's contact information

Figure 39: 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.

Figure 40: 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.

Name	Date of Birth	Exposure	Status	Continuous Exposure?
Berry, Ron	01/11/1961	Exposure	Actively Monitoring	No

Figure 41: 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.

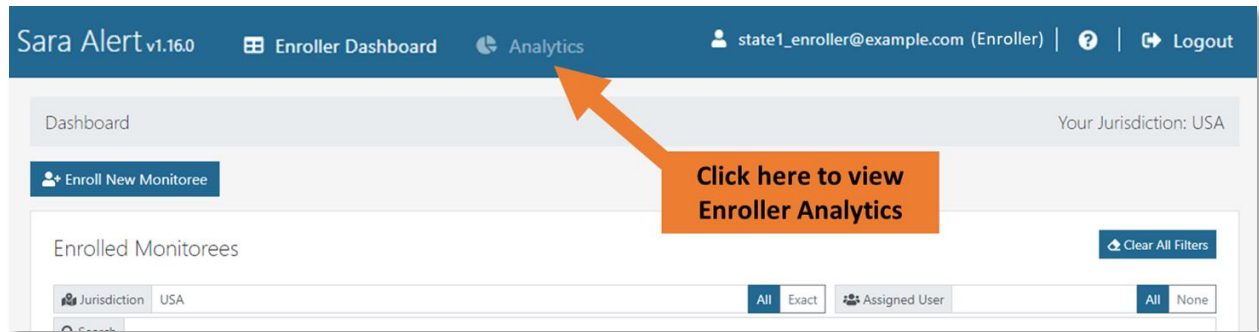


Figure 42: View Enroller analytics.

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 from Sara Alert™ (Email and SMS only)

It is important to coordinate the timing of system welcome messages with monitorees so that they know the message is legitimate. Whether or not a monitoree receives a welcome message depend on their Preferred Reporting Method:

- **Emailed Weblink:** Monitorees who have "E-mailed Web Link" set as the preferred reporting method **at the time of enrollment** will receive an initial welcome notification from the system immediately after enrollment is completed through the user interface or import. The email welcome message provides a link for the monitoree to submit their daily report. Each jurisdiction using Sara Alert can provide its own custom welcome message (the image below is an example).

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

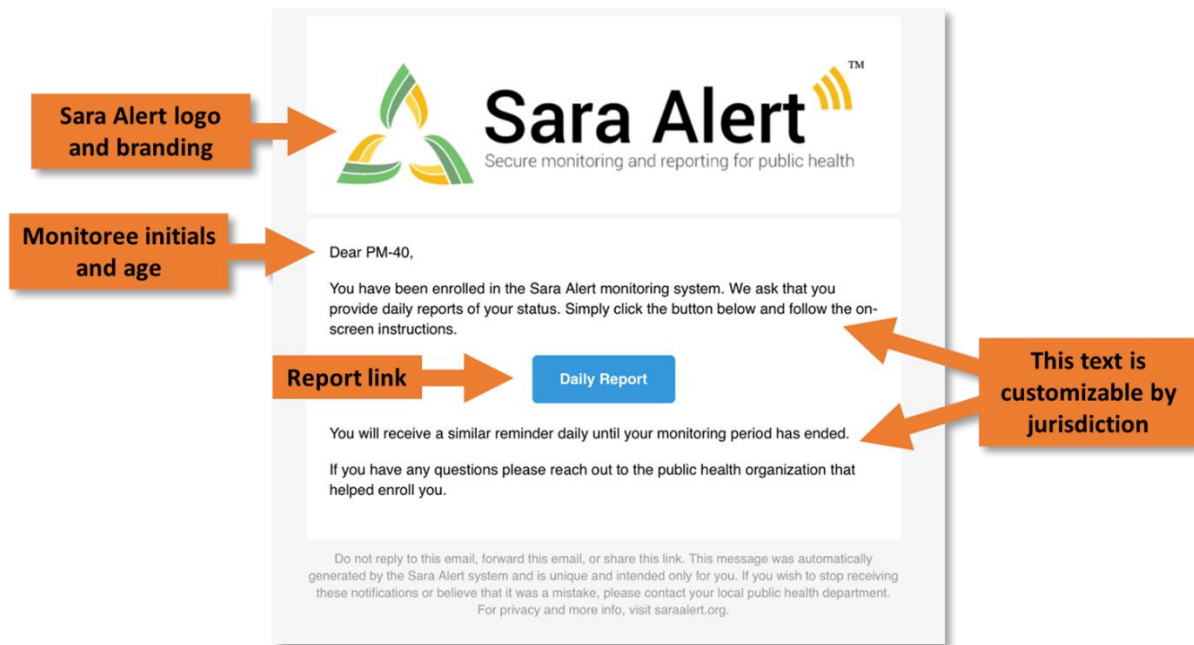


Figure 43: An example email welcome message received by an eligible monitoree

- SMS Texted Weblink and SMS Text-message:** Monitorees who have “SMS Texted Weblink” or “SMS Text-message” set as the preferred reporting method **at the time of enrollment** will receive an initial welcome notification from the system immediately after enrollment is completed through the user interface or import. Each jurisdiction using Sara Alert can provide its own custom welcome message, but it will always include the monitoree’s initials and age, as well as a link to the Sara Alert website/privacy policy.

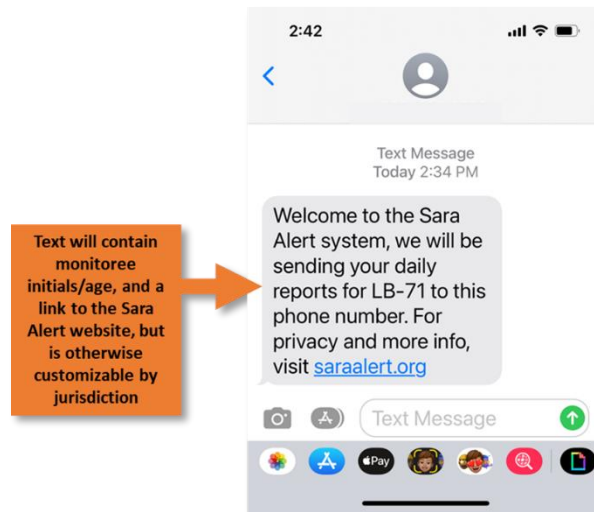


Figure 44: An example email welcome message received by an eligible monitoree

- Telephone Call:** Monitorees who have Telephone Call set as the preferred method at the time of enrollment **will not** receive a specific welcome call.
- Households (Email or SMS Weblink):** If a user enrolls a household in Sara Alert, a welcome message is only sent when the Head of Household is enrolled.

- **NOTE:** If the preferred reporting method is initially set to “Unknown,” “Opt-Out,” or “Telephone Call” and later updated to **Email** or **SMS Messages** (weblink or text), the monitoree **will not** receive a welcome message from the system.

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 monitorer’s time zone to US Eastern Time.

6.2.4 Reminder Message (Telephone Only)

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

- The system sends a Reminder Call once an hour during the monitorer’s “Preferred Contact Period” until the monitorer submits a report. If the monitorer doesn’t respond, the system calls back up to four times.
- If the system doesn’t understand the monitorer or the monitorer 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 monitorer as “non-reporting.”

6.2.5 Monitoring Complete Message (Email Only)

If a monitorer 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 monitorers who have an email address entered in Sara Alert™.

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

Monitorers 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 monitorer can re-start text messages by texting “Start” to the Sara Alert phone number.

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

Monitorer Details

Murphy Flynn

Assigned Jurisdiction: USA, Virginia, Central, Chickahominy
Assigned User: 4444

IDENTIFICATION	CONTACT INFORMATION
DOB: 04/27/1999 Age: 22 Language: English Sara Alert ID: 1409 State/Local ID: -- CDC ID: -- NNDSS ID: -- Birth Sex: Male Gender Identity: Male (Identifies as male) Sexual Orientation: -- Race: White Ethnicity: Not Hispanic or Latino Nationality: United States	PRIMARY CONTACT Contact Name: -- Contact Relationship: Unknown Phone: 555-555-5555 SMS Blocked Preferred Contact Time: Afternoon Primary Telephone Type: Smartphone Email: murphyflynn@smurf.com Preferred Reporting Method: SMS Texted Weblink

▼ Show address, travel, exposure, and case information

Blocked numbers are identified

Red text means SMS-based reporting method picked for blocked number

Figure 45: The Monitorer Details screen shows if a monitorer 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 the 'Monitoree Contact Information' form. At the top, there are tabs for 'Primary' and 'Alternate'. A blue informational box states: 'Sara Alert will use the primary contact for communication with the monitoree. Automated messages will be sent to the primary contact phone/e-mail entered here.' Below this, there are fields for 'CONTACT RELATIONSHIP' (set to 'Unknown'), 'CONTACT NAME', 'PREFERRED REPORTING METHOD' (set to 'SMS Texted We'), and 'PREFERRED CONTACT TIME' (set to 'Afternoon'). A red box with an arrow points to the 'PRIMARY TELEPHONE NUMBER' field, which contains '555-555-5555'. The red box contains the text: 'The system will indicate if a phone number has blocked text messages from Sara Alert'. Below the phone number field, a pink warning box states: 'Warning: SMS-based reporting selected and this phone number has blocked SMS communications with Sara Alert'. To the right of the phone number field, there is a label 'SMS Blocked' and a 'SECONDARY TELEPHONE NUMBER' field.

Figure 46: 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 30](#)).

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.

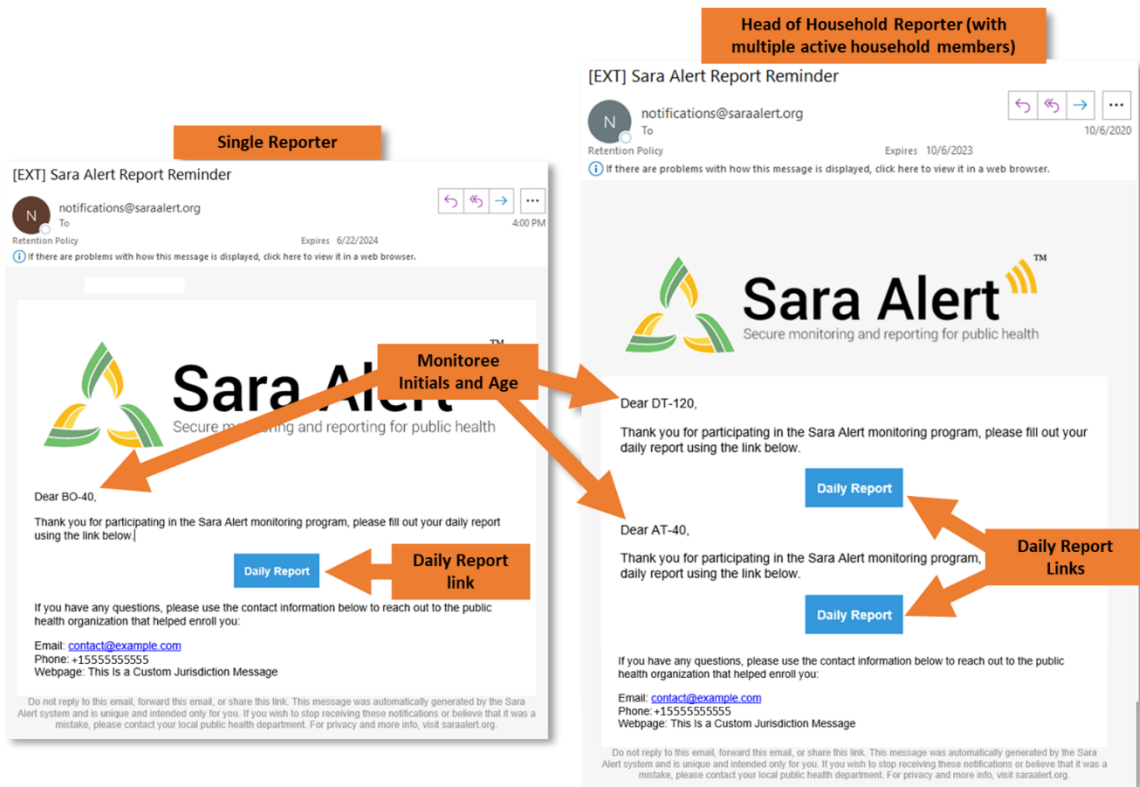


Figure 47: Example Daily Report message emails

To submit their Daily Report:

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

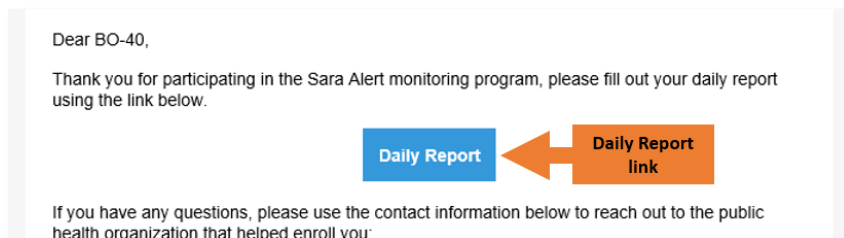


Figure 48: Example Daily Report Message email

- 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:

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- 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.

Sara Alert v1.16.0

Daily Self-Report (MM-40)

Please select all symptoms which you are experiencing.

- ☐ Chills
- ☐ Congestion or Runny Nose
- ☐ Cough
- ☐ Diarrhea
- ☐ Difficulty Breathing
- ☐ Fatigue
- ☐ Fever Feeling feverish or have a measured temperature at or above 100.4°F/38°C
- ☐ Headache
- ☐ Muscle Pain
- ☐ Nausea Or Vomiting
- ☐ New Loss of Smell
- ☐ New Loss of Taste
- ☐ Repeated Shaking with Chills
- ☐ Shortness of Breath
- ☐ Sore Throat
- ☐ Used A Fever Reducer in the past 24 hours, have you fevers?
- ☐ I am not experiencing any symptoms

Submit

Annotations: Symptom List, Monitoree initials and age, Click if no symptoms. Or leave all boxes unchecked and click Submit., Click to submit

Figure 49: Example Daily Report

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

Sara Alert v1.16.0

Daily Self-Report

Thank You For Completing Your Self Report

- If you did not report any symptoms, please continue to follow the recommendations provided by your local health department.
- If you reported any symptoms, your local health department will be reaching out soon. If you have any immediate concerns, please contact your medical provider or local health department. Avoid close contact with other people and stay at home.
- If you are experiencing a medical emergency, please call 911 and let them know you are being monitored by the health department.

Confirmation message with a large green checkmark icon.

Figure 50: Confirmation message

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.

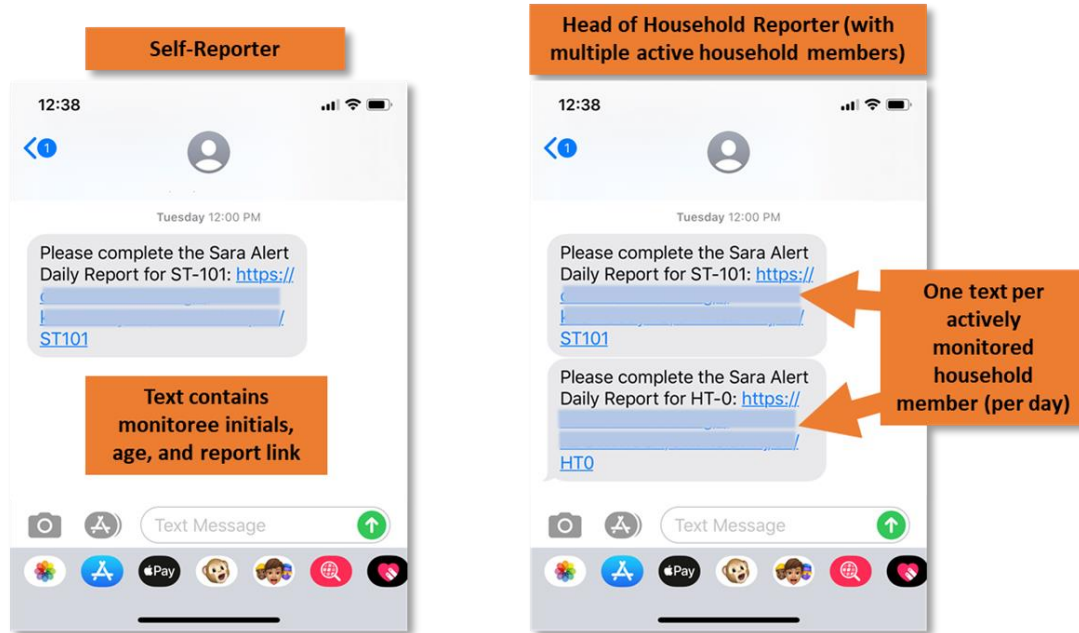


Figure 51: Example Daily Report Message by SMS-Texted Weblink

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

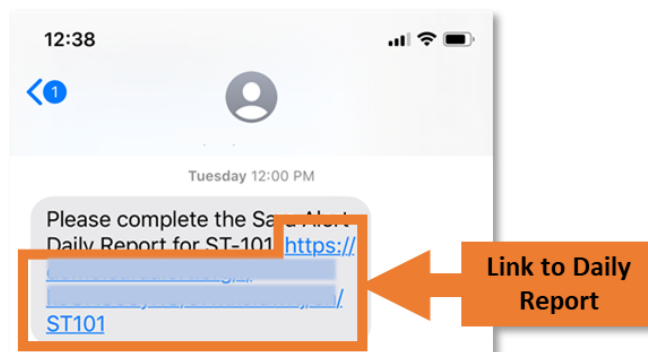


Figure 52: Daily Report weblink message for monitorees using SMS-Texted Weblink

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.

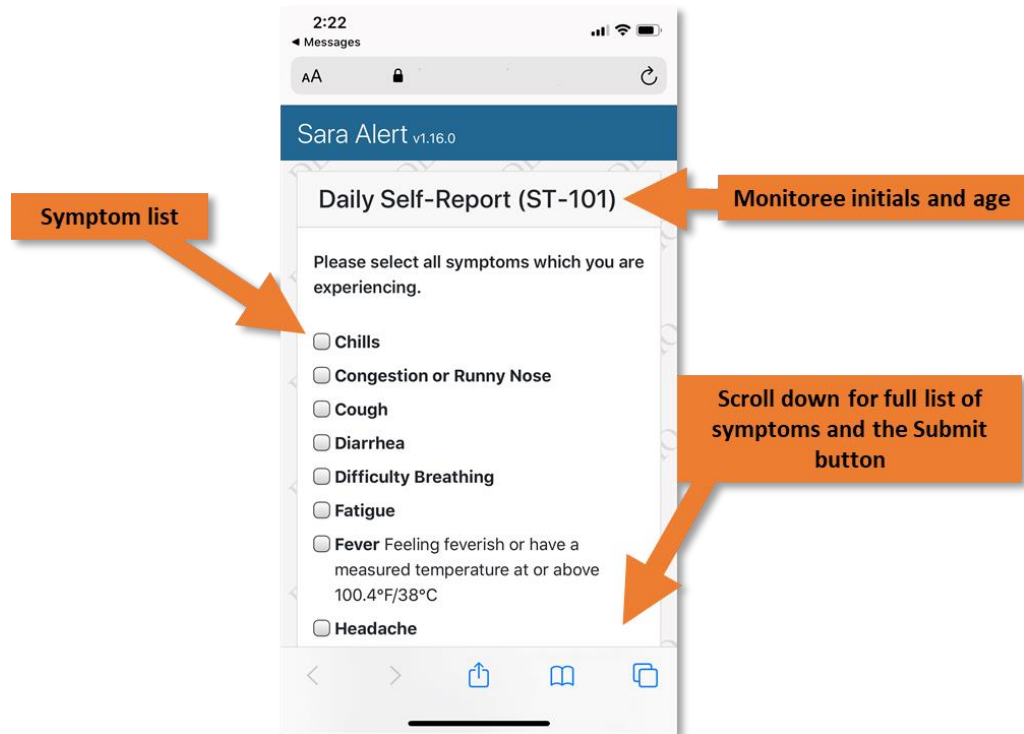


Figure 53: Example Daily Report for monitorees using SMS-Texted Weblink

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

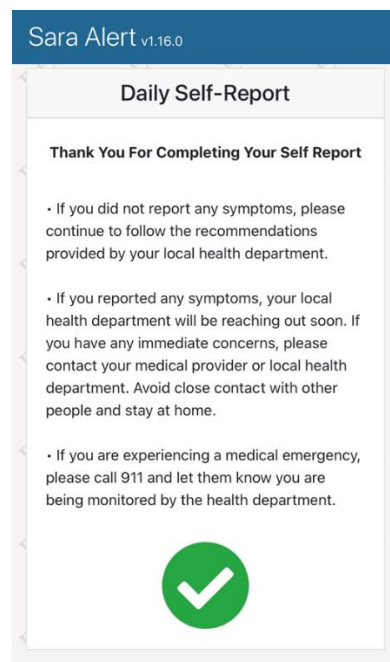


Figure 54: SMS-Texted Weblink confirmation message

6.4.3 SMS-Text Message

Monitorees who report their symptoms by SMS Text Message get a text from Sara Alert™ each day. If the monitorer 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 monitorer's cellphone.

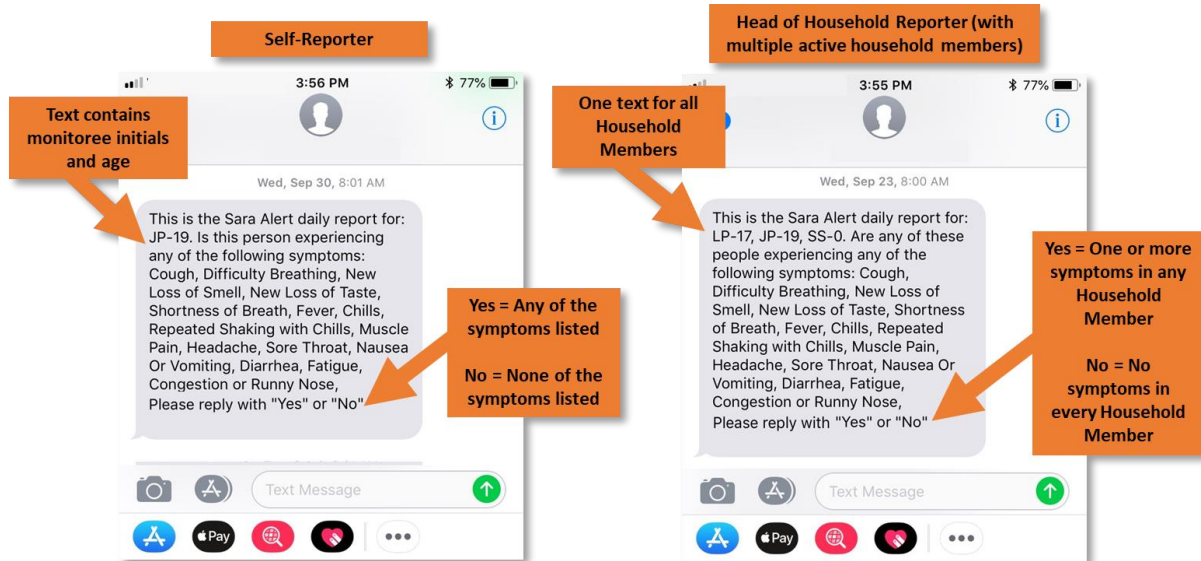


Figure 55: Example Daily Report text messages

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

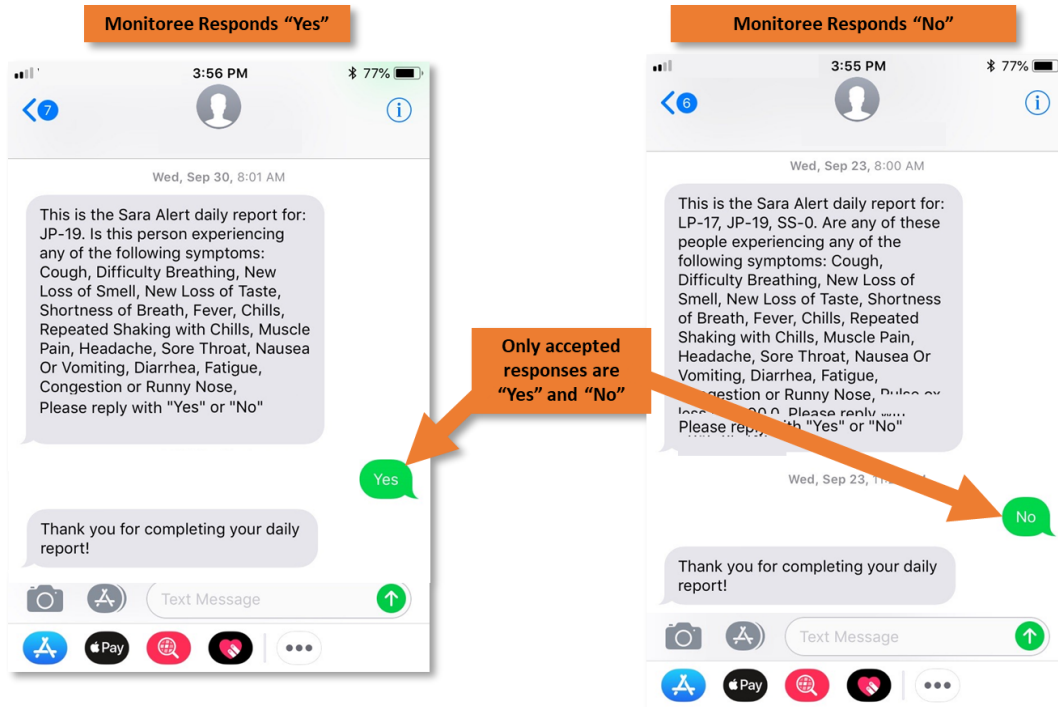


Figure 56: Monitoree responses to SMS-Text Daily Reports

- 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.

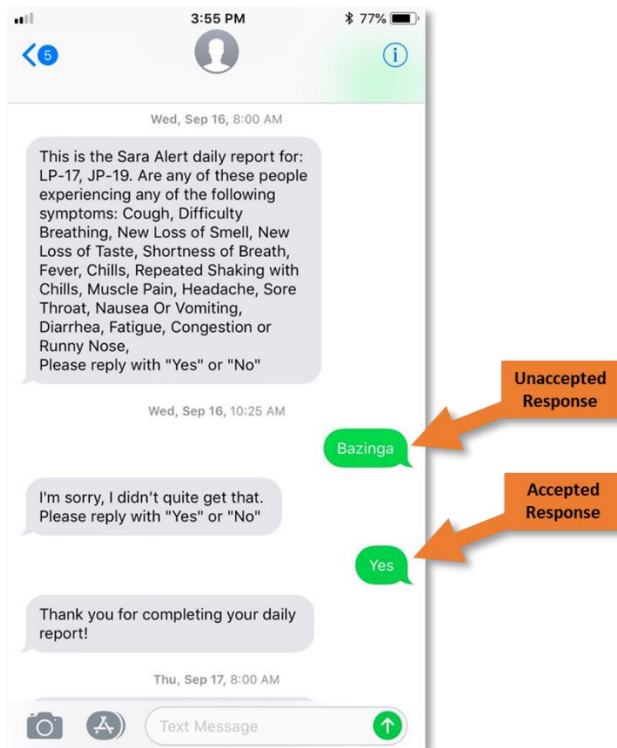


Figure 57: Invalid responses prompt a follow-up

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

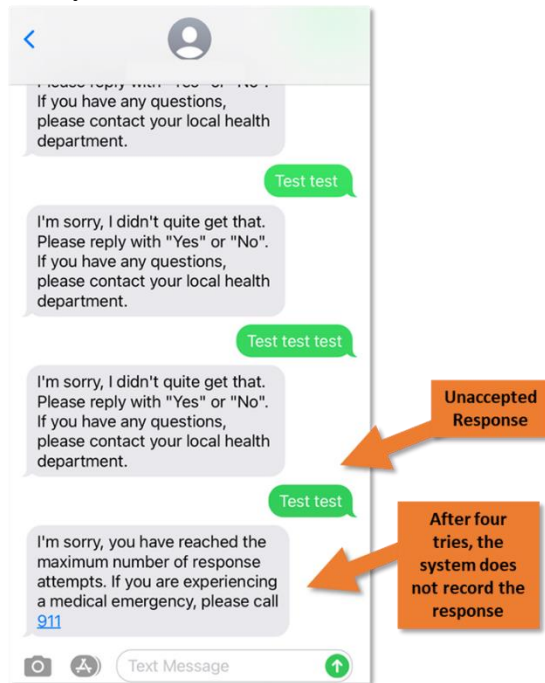


Figure 58: System response after four tries

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.