



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

# User Guide

Software Version 1.44  
April 19, 2022

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# 1 CAPABILITY INDEX BY ROLE

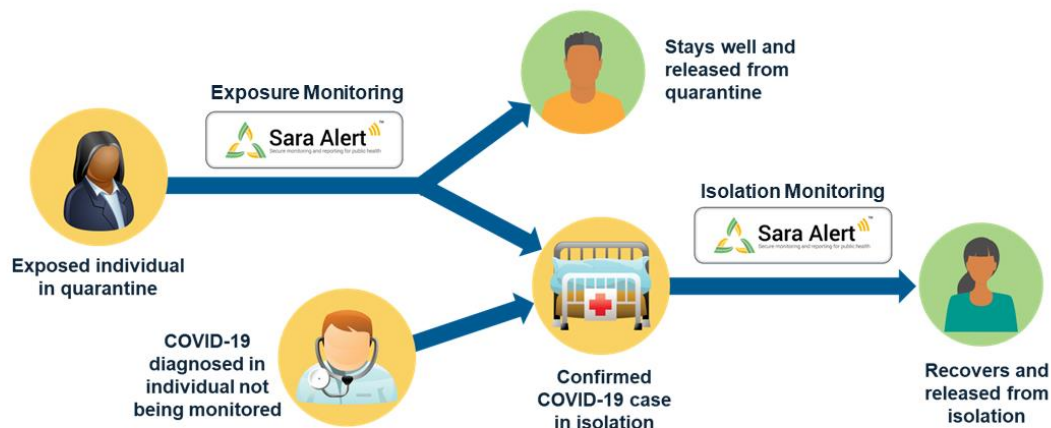
Capability	Enroller	Public Health	Public Health Enroller	Contact Tracer	Analyst	Administrator	Super User	Page #
Enroll New Monitoree in Either Workflow	●		●	●			●	50
View and Edit Enrollment Details	●	●	●	●			●	61
View and Export Analytics Summary		●	●		●		●	145
Export Records		●	●				●	133
• <i>Single Record</i>		●	●				●	142
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View Monitoring Line Lists		●	●	●			●	61
Advanced Filter		●	●	●			●	66
Update Multiple Records from Dashboard		●	●	●			●	77
Create Reporting Household	●		●	●			●	117
Remove a Monitoree From a Household	●		●	●			●	125
Change a Head of Household	●		●	●			●	126
Create/Modify a Household from Existing Records	●		●	●			●	123
Update Monitoring Actions for an Entire Household		●	●	●			●	128
Transfer Record to Other Jurisdiction		●	●				●	92
Log a Manual Contact Attempt		●	●	●			●	96
Manually Add a Daily Report		●	●	●			●	97
Modify a Daily Report		●	●	●			●	98
Add a New Close Contact		●	●	●			●	103
Enroll a Close Contact as a Monitoree			●	●			●	103
Add Comments to a Record		●	●	●			●	106
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Update Case Status to change record workflow		●	●	●			●	112
Pause or Resume Notifications		●	●	●			●	101
Add Laboratory Test Results		●	●	●			●	101
Add Vaccinations		●	●	●			●	103
Flag a Monitoree for Follow-Up		●	●	●			●	80
Add Users						●	●	151
View List of Users						●	●	150
Export a List of Users						●	●	152
Reset User Passwords						●	●	157
Edit User Account Info						●	●	153
View User Account Event History						●	●	154
Reset User 2-Factor Authentication						●	●	158
Enable API Access						●	●	160

## 2 ABOUT SARA ALERT™

Sara Alert™ serves as a force multiplier that supports public health response to emerging disease threats, including active monitoring of home quarantine and isolation for disease containment or mitigation. This open-source tool allows public health resources to be directed where they are most needed.

Sara Alert enables public health officials to enroll individuals (“monitorees”) at risk of developing a disease of interest, for example COVID-19. Once enrolled, monitorees 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.

Sara Alert also enables public health officials to enroll cases who require monitoring to determine when it is safe to discontinue home isolation. Cases also receive automated reports asking about their status. If a monitoree 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**.



**Figure 1: Sara Alert™ Concept of Operations**

Visit <https://www.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).

## 2.1 The Sara Alert™ API

To support interoperability and exchange of information with other information technology (IT) systems, the Sara Alert™ system has implemented an Application Programming Interface (API) using [SMART on HL7 Fast Healthcare Interoperability Resources \(FHIR\) API standards and specifications](#).

Additional standards used to support the API include:

- [FHIR Release 4 \(R4\)](#), its components, and specifications
- [SMART application launch framework](#)
- C# FHIR [library](#)
- [OAuth 2.0](#)

The Sara Alert API documentation is available to users on GitHub [here](#).

### 2.1.1 Get Started Using the API

No matter the workflow, in order to use the Sara Alert™ API and ensure security of application data, the client must go through a three-step process before reading or writing any data.

1. **Registration:** Register as a Client Application with Sara Alert™ (one-time step) by emailing [sarasupport@aimsplatform.com](mailto:sarasupport@aimsplatform.com) to request access. The registration process allows Sara Alert™ to pre-authorize and curate the clients that will be using the Sara Alert API. Registration is a manual step, as is [traditional](#).
2. **Authorization:** Go through an authorization process to obtain access token for API requests.
3. **Authentication:** Use the obtained access token to make API requests to the Sara Alert API.

### 2.1.2 Supported Workflows

Sara Alert™ currently supports two different workflows for API use. Both of these workflows are [SMART-on-FHIR standards](#).

1. [SMART on FHIR App Launch Framework "standalone launch"](#). This expects and requires a user in the loop. For Sara Alert™, this means that a user must be logged in to the Sara Alert User Interface, which requires 2 factor-authentication to have been completed (See **page 158**). After an application is authorized, users must individually be given "API access" by their local jurisdiction administrators. Please contact your local administrator to be granted this access.
2. [SMART on FHIR Backend Services](#). This is complementary to the above flow and does not require a user in the loop.

## 3 GETTING STARTED

### 3.1 Terms to Know

Before logging in and getting started using Sara Alert™, you should understand how these basic terms are used in Sara Alert. These terms are used frequently throughout the Sara Alert system, as well as this guide; each has a very specific meaning in Sara Alert. For a full list of terms used in this guide, download the Sara Alert Resource Glossary at <https://saraalert.org/guides>.

**Household:** A specific group of monitorees who report to Sara Alert together. A special monitoree in the group, the Head of Household, reports for all the monitorees in the Household. **Section 11** starting on **page 116** covers Households.

**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).

**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.

**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.

**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

**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.

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

**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.

**workflow:** One of two ways monitorees are monitored in Sara Alert, depending on whether they are exposed to or are sick with the disease of interest. See the **Workflow Summary** on **page 5** for more information.

## 3.2 Workflow Summary

The Sara Alert™ system contains two parallel public health workflows that track two types of monitorees shown in Figure 2:

- **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. This workflow is described in more detail starting on **page 39**.
- **Isolation Monitoring Workflow:** allows public health to monitor cases daily to determine when they preliminarily meet a recovery definition and it may be safe to discontinue isolation. This workflow is described in more detail starting on **page 44**.

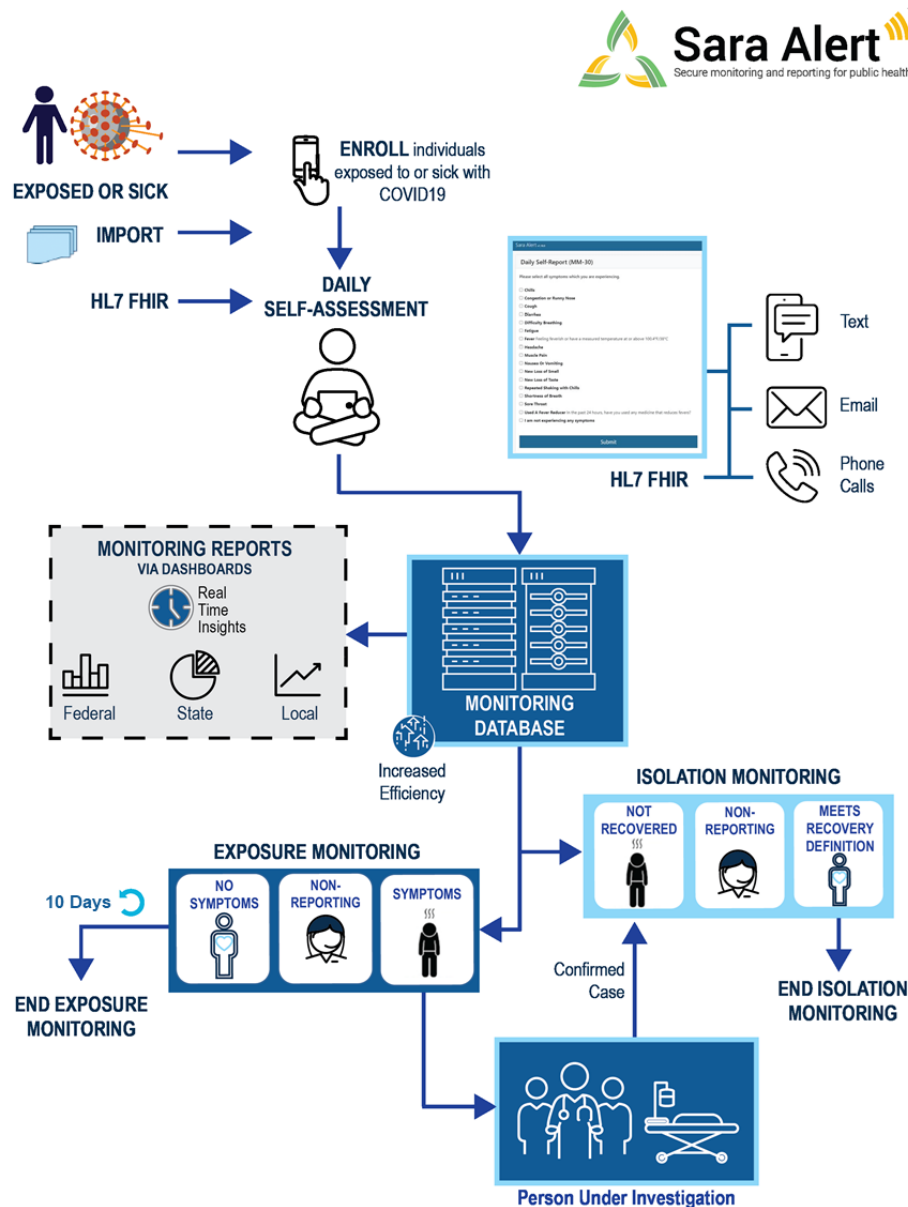


Figure 2: Sara Alert™ Workflow Summary

### 3.3 How to Log In to Sara Alert™

1) Open Sara Alert™ in a web browser. Compatible web browsers include Chrome, Microsoft Edge, Microsoft Internet Explorer 11, Mozilla Firefox, and Safari. If using Microsoft Internet Explorer 11, you may need to turn off compatibility mode.

2) Log in using your credentials.

If this is your *first login attempt*, use the temporary password you were issued; you will be prompted to change it. Temporary passwords **expire after 72 hours**. If your temporary password has expired, contact your jurisdiction administrator for a password reset.

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

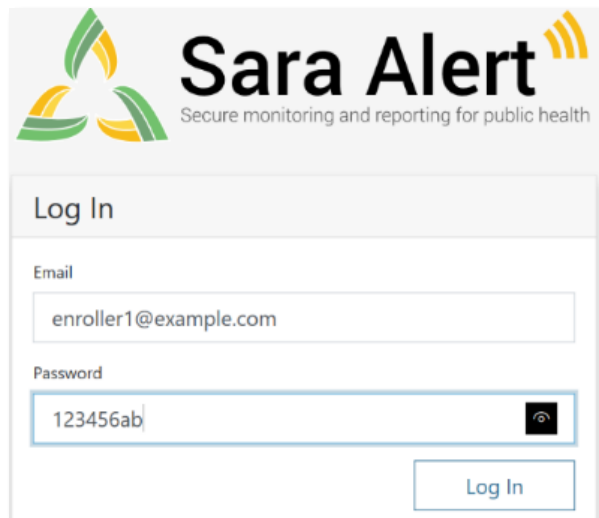
The image shows the Sara Alert login interface. At the top is the Sara Alert logo, which consists of three stylized leaves in green and yellow, followed by the text "Sara Alert" and a small signal icon. Below the logo is the tagline "Secure monitoring and reporting for public health". The main section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

Figure 3: Log in screen

3) Register for two-factor authentication (2FA) by providing a phone number. (**NOTE:** this is only required the first time you use Sara Alert). This is how you will receive your 7-digit 2FA token number. Once you have entered your phone number and country (for the country code), click “**Register**.”

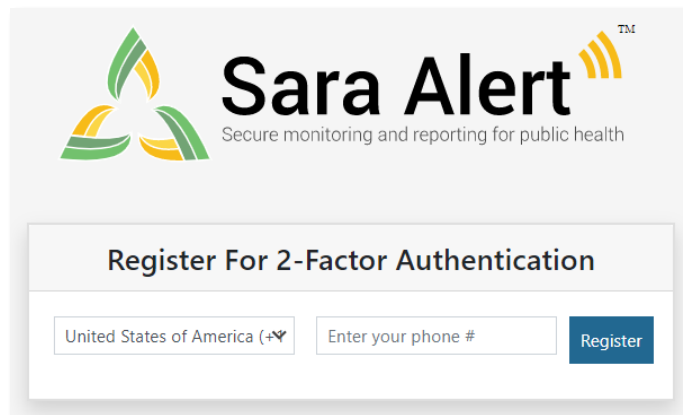
The image shows the Sara Alert registration interface for two-factor authentication. At the top is the Sara Alert logo and tagline. The main section is titled "Register For 2-Factor Authentication". It contains two input fields: "United States of America (+)" and "Enter your phone #". There is a "Register" button at the bottom right of the form.

Figure 4: Enter your phone number

4) For all login attempts after initial registration, you will be prompted to choose how to receive the 7-digit 2FA token (i.e., SMS/Text or through a phone call).

- Select your preferred method to receive the 2FA token
- Enter the 7-digit token when you receive it and click “Submit”

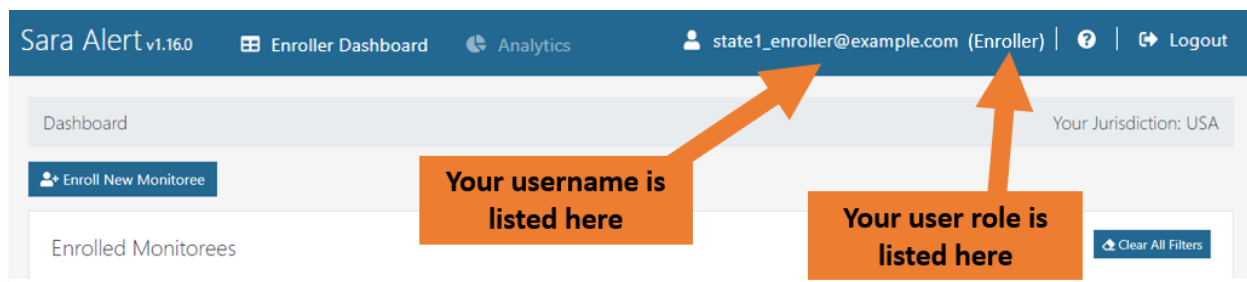
**Figure 5: Choose your 2FA method**

5) Depending on your assigned system role, you will be taken to a different view:

- **Enroller:** Enroller Dashboard
- **Public Health, Public Health Enroller, Contact Tracer, or Super User:** Monitoring Dashboards
- **Analyst:** Analytics
- **Administrator:** Admin Panel

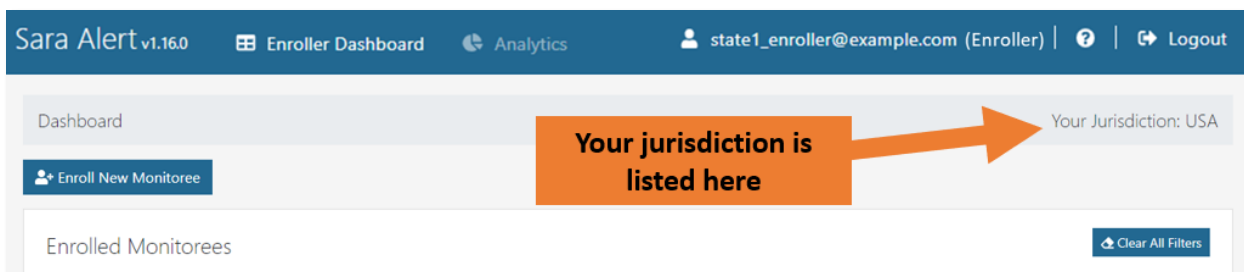
**Page 9** provides an overview of each Sara Alert view.

6) Your username and user role are listed in the upper right-hand corner of the screen.



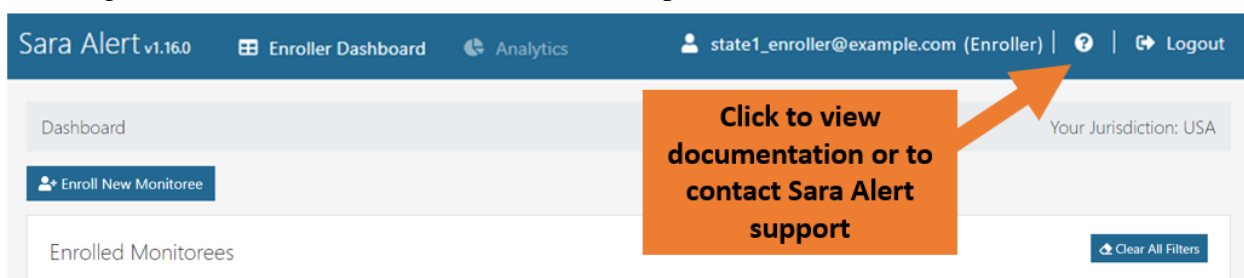
**Figure 6: Your Sara Alert™ username and user role**

7) Your assigned jurisdiction is listed in the upper right-hand corner of the screen. Your record view is restricted to what you have access to based on your jurisdiction and role assignments (see Role Overview starting on **page 17**).



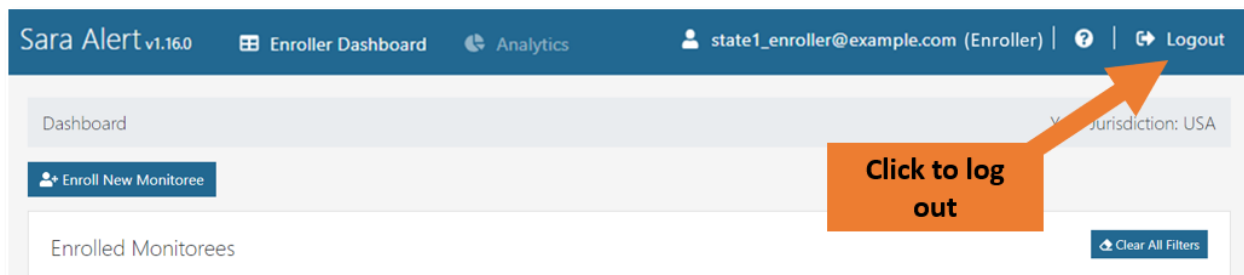
**Figure 7: Your Sara Alert™ jurisdiction**

8) The “**Help**” button provides 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**.” Users should log out of the system when they are not using it. Users are automatically logged out of Sara Alert 24 hours after their last activity in the system.



**Figure 9: The logout button**



### 3.4 Sara Alert™ Views

Once you have logged into Sara Alert™, you will be able to start accessing data in the system. Data in Sara Alert is organized into “views.” There are five different views in Sara Alert. Each view lets you see or manage different types of data for your jurisdiction. The five views are:

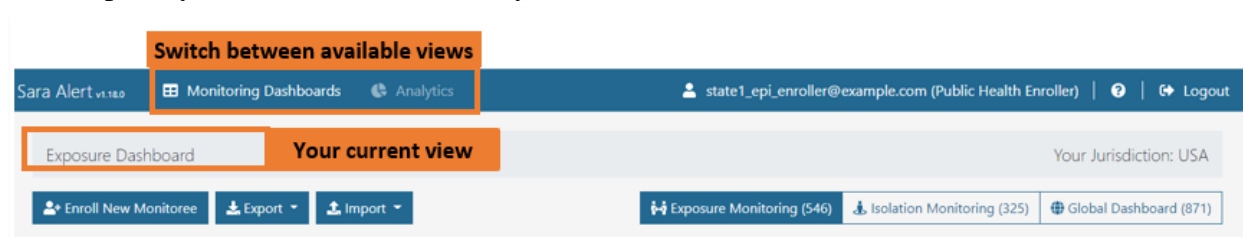
- **Monitoring Dashboards:** A detailed list of monitorees in your jurisdiction, organized into line lists based on their status. Depending on your user role, you may be able to find and view monitoree records, enroll monitorees, import records, and export record data from the Monitoring Dashboards. Depending on the disease you are monitoring, the Monitoring Dashboards may include the following:
  - **Exposure Dashboard:** Contains the line lists of monitorees who are being monitored for potential exposure to a disease.
  - **Isolation Dashboard:** Contains the line lists of cases who are being monitored.
  - **Global Dashboard:** Shows all monitorees in your jurisdiction.
- **Analytics:** Contains tables, charts, and maps summarizing monitoring data for your jurisdiction.
- **Admin Panel:** Contains all user management functions, including a list of users in your jurisdiction.
- **Enroller Dashboard:** A simplified list of monitorees the user has enrolled. You can find and view enrollment information for these monitorees.
- **Enroller Analytics:** A simplified summary how many monitorees you have enrolled.

Not every user can see every view. Your user role determines which view(s) you can access. Table 1 shows which user roles can see which views. If you need access to a view that your role cannot access, contact your jurisdiction’s Administrator or Super User.

**Table 1: Access to Sara Alert™ views by user role**

View	Enroller	Public Health	Public Health Enroller	Contact Tracer	Analyst	Adminis- trator	Super User
Monitoring Dashboards		✓	✓	✓			✓
Analytics		✓	✓		✓		✓
Admin Panel						✓	✓
Enroller Dashboard	✓						
Enroller Analytics	✓						

If you have access to multiple views, you can switch between them by clicking on the view name at the top left your screen, above where your current view is shown.



**Figure 10: You can switch between views and see your current view at the top of your screen.**

### 3.4.1 Monitoring Dashboards

The Monitoring Dashboards views are the main views used for managing monitorees. These views contain a list of all the monitoree records in your jurisdiction, organized by workflow and line list. The Monitoring Dashboard views are configurable based on the disease being monitored. For COVID-19, there are dashboard views for the Exposure Workflow and the Isolation Workflow, as well as a combined Global Dashboard, which shows all monitorees in the jurisdiction, across both workflows.

#### Which users can access the Monitoring Dashboards views?

- Public Health users
- Public Health Enrollers
- Contact Tracers
- Super Users

#### 3.4.1.1 How do I navigate the Monitoring Dashboards views?

You can navigate the Monitoring Dashboards using the areas of the screen highlighted in Figure 11 below.

- **View your current workflow** in the top left of the screen.
- **Switch between different workflow views** by clicking the tabs at the top right of the screen (see [page 62](#) for more information).
- **Switch between line lists** by clicking the line list tabs or **see all records in the workflow** by clicking the tab at the far right (see [page 62](#) for more information).
- **Change the number of records displayed per page** at the bottom left of the screen.
- **Navigate to different pages of records** at the bottom right of the screen.

The screenshot shows the 'Exposure Dashboard' interface. At the top, there's a header with 'Exposure Dashboard' and 'Current view/workflow'. Below this are buttons for 'Enroll New Monitoree', 'Export', and 'Import'. To the right, there are tabs for 'Exposure Monitoring (10)', 'Isolation Monitoring (1)', and 'Global Dashboard (11)'. Below the tabs, there are filters for 'Symptomatic' (5), 'Non-Reporting' (3), 'Asymptomatic' (0), 'PUI' (1), 'Closed' (1), 'Transferred In' (0), and 'Transferred Out' (0). A 'Switch between line lists' callout points to the 'Symptomatic' filter. Below the filters, there's a 'Monitorees' section with a 'See all records in dashboard' callout. The main table lists monitorees with columns: Monitoree, Jurisdiction, Assigned User, State/Local ID, Date of Birth, Phone Number, End of Monitoring, Risk Level, Monitoring Plan, and Latest Report. At the bottom left, a 'Change the number of records displayed per page' callout points to the 'Show 10' dropdown. At the bottom right, a 'Navigate to view more records' callout points to the pagination controls.

Monitoree	Jurisdiction	Assigned User	State/Local ID	Date of Birth	Phone Number	End of Monitoring	Risk Level	Monitoring Plan	Latest Report
Example, UAT	State 29	30	test	01/01/1986	703-505-8352	11/03/2021	Low	None	10/18/2021 12:07 EDT
History, UAT	State 29		State/Local	01/01/2013	703-505-8352	10/09/2020		None	10/27/2021 11:59 EDT
Fishburne, Morpheus	State 29		GA	07/30/1961	770-000-0000	Continuous Exposure		Daily active monitoring	
Dietrich, A	State 29			11/10/1957	555-555-0173	12/26/2021	Medium	Self-monitoring with public health supervision	12/03/2021 14:08 EST
				11/12/1989		11/23/2020			

Figure 11: You can navigate the Monitoring Dashboards using the highlighted areas.

### 3.4.1.2 How do I find records of interest?

You can use a few different search features on the Monitoring Dashboards to find specific records. The Monitoring Dashboards also use icons and symbols to highlight priority records. Some of these features are highlighted in Figure 12.

- **Search for specific records** using the search bar, jurisdiction filter, assigned user filter, and Advanced Filters. **Clear all filters and searches** using the “Clear All Filters” button. Section 10.2.4 on **page 63** covers how to search and filter for records.
- **Sort a column** by clicking the arrows in the column header.
- The **“HoH” icon** indicates a Head of Household.
- The **“Alert” icon** indicates a monitoree’s latest report was symptomatic.
- The **“Flag” icon** indicates a monitoree was manually flagged for follow-up.
- The **“Child” icon** indicates a monitoree is a minor (under 18 years of age).
- The **total number of records meeting search and filter criteria** is shown at the bottom of the page.

The screenshot shows the 'Exposure Dashboard' for 'Your Jurisdiction: USA, State 29'. It includes a top navigation bar with buttons for 'Enroll New Monitoree', 'Export', and 'Import'. Below this is a summary bar showing counts for Symptomatic (5), Non-Reporting (3), Asymptomatic (0), PUI (1), Closed (1), Transferred In (0), and Transferred Out (0). A 'Clear all searches and filters' button is also present.

The main content area displays a table of monitorees. The table has columns for Monitoree, Jurisdiction, Assigned User, State/Local ID, Date of Birth, Phone Number, End of Monitoring, Risk Level, Monitoring Plan, and Latest Report. Several rows are visible, including 'Example, UAT', 'History, UAT', 'Fishburne, Morpheus', 'Dietrich40, Shawn54', and 'Test, Elvis'.

Orange callouts highlight the following features:

- Search or filter for specific records:** Points to the search bar and filter options at the top of the table.
- Click arrows in column header to sort:** Points to the sort arrows in the 'Date of Birth' column header.
- “HoH” icon indicates a Head of Household:** Points to the 'HoH' icon in the 'Monitoree' column for 'Example, UAT'.
- “Flag” icon indicates follow-up needed:** Points to the flag icon in the 'Monitoree' column for 'Dietrich40, Shawn54'.
- “Child” icon indicates a minor:** Points to the child icon in the 'Monitoree' column for 'History, UAT'.
- “Alert” icon indicates latest report was symptomatic:** Points to the red triangle icon in the 'Latest Report' column for 'Example, UAT'.
- Total number of records on line list that meet search and filter criteria:** Points to the 'Displaying 14 out of 127 rows' text at the bottom of the table.

Figure 12: You can use the highlighted areas to find records of interest.

### 3.4.1.3 What else can I do from the Monitoring Dashboards?

You may be able to do some or all of the following, depending on your user role:

- Public Health users, Public Health Enrollers, Contact Tracers, and Super Users can:
  - **View a monitoree’s record** by clicking their name. See Section 10.1.1 on **page 60** for more information.

- **View a monitoree’s notification eligibility status** by hovering over the icon in the column with the “speech bubble” header. Section 10.2.8 on **page 76** covers how these icons are used.
- **Select and update multiple records** using Bulk Actions. Section 10.2.10 on **page 81** covers Bulk Actions.
- Public Health Enrollers, Contact Tracers, and Super Users can:
  - **Manually enroll new monitorees** using the enrollment wizard. Manual enrollment is covered in Section 9.1, starting on **page 50**.
- Public Health users, Public Health Enrollers, and Super Users can:
  - **Import** records to enroll multiple monitorees at once. Import is covered in section 9.2, starting on **page 52**.
  - **Export** record data. See section 12 on **page 133** for more information.

The screenshot displays the 'Monitoring Dashboards' interface. At the top, there's a header 'Your Jurisdiction: USA, State 29'. Below it, a navigation bar includes 'Create, export, and import records' with buttons for 'Enroll New Monitoree', 'Export', and 'Import'. A secondary bar shows filters for 'Exposure Monitoring (10)', 'Isolation Monitoring (1)', and 'Global Dashboard (11)'. A status bar below lists categories like 'Symptomatic 5', 'Non-Reporting 3', 'Asymptomatic 0', 'PUI 1', 'Closed 1', 'Transferred In 0', 'Transferred Out 0', and 'All Monitorees 10'. The main content area shows a message: 'Monitorees who have reported symptoms, which need to be reviewed. You are currently in the exposure workflow.' Below this is a search bar and a table of monitorees. The table has columns: Monitoree, Jurisdiction, Assigned User, State/Local ID, Date of Birth, Phone Number, End of Monitoring, Risk Level, Monitoring Plan, and Latest Report. The first row is 'Example, UAT' with a 'Holi' icon. A callout 'Click a name to open that record' points to the 'Example, UAT' cell. Another callout 'View notification eligibility status' points to the 'Latest Report' column. A third callout 'Select and update records' points to the 'Bulk Actions' dropdown. The bottom of the table shows 'Showing 10 out of 127 rows' and a pagination bar with 'Previous', '1', '2', '3', '4', '5', '...', '13', and 'Next'.

**Figure 13: Some users can perform other capabilities from the Monitoring Dashboards.**

### 3.4.2 Analytics

The Analytics view shows a summary of data for monitorees in your jurisdiction. The data is displayed in charts, tables, and maps and is aggregated, so it does not contain information about specific monitorees. Analytics are updated daily.

#### Which users can access the Analytics view?

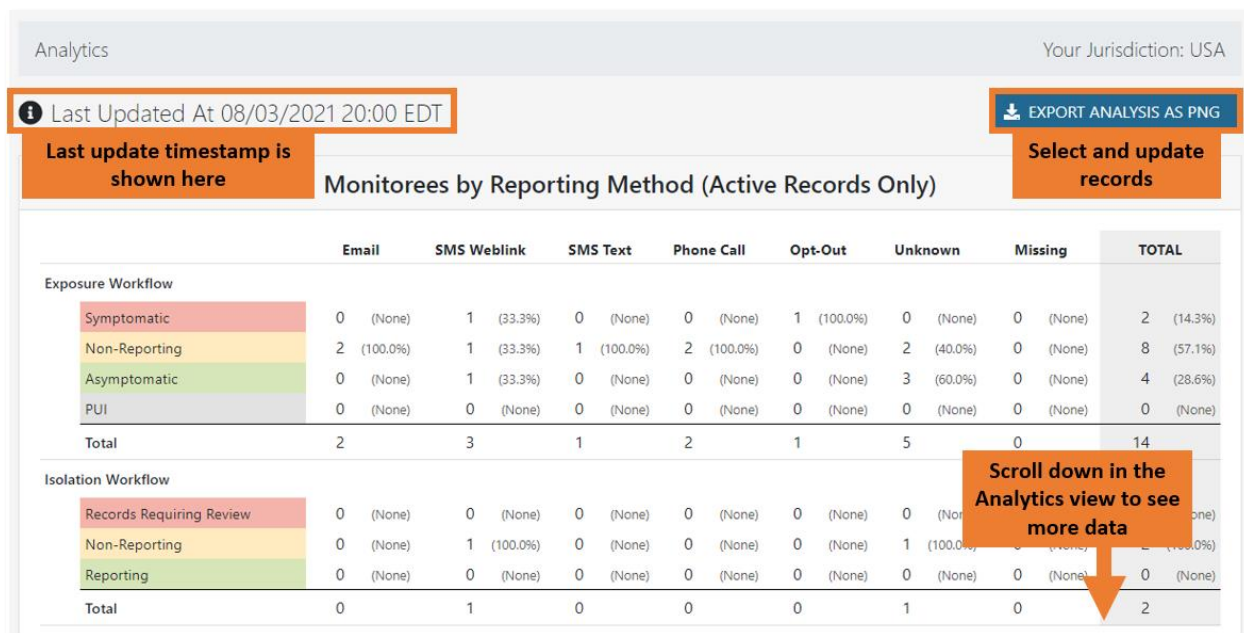
- Analysts
- Public Health users
- Public Health Enrollers
- Super Users

### 3.4.2.1 What can I do and see in the Analytics view?

The following capabilities are highlighted in Figure 19 below:

- **View the last time the Analytics view was updated** at the top left of the screen.
- **Export the Analytics view** as an image using the button at the top right (see [page 145](#) for more details)
- **You will need to scroll down** to see the full view.

Section 13 starting on [page 144](#) covers the Analytics view in greater detail.



**Figure 14: You can see high-level data summaries in the Analytics view.**

## 3.4.3 Admin Panel

The Admin Panel lets you see and manage users in your jurisdiction. You can use the Admin Panel to set up accounts and help users with locked accounts and password resets. This view is typically only accessible by top level users in a jurisdiction.

### Which users can access the Admin Panel?

- Administrators
- Super Users

### 3.4.3.1 What can I do and see in the Admin Panel?

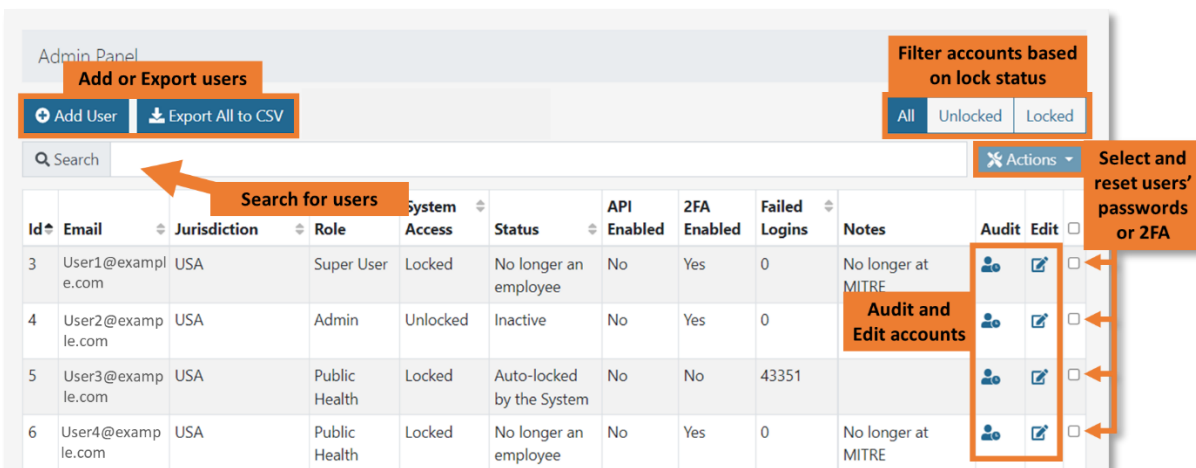
You can use the Admin Panel to do the following:

- View account information about users in your jurisdiction.
- Add a new user to your jurisdiction.
- Export a list of users in your jurisdiction.
- Lock or unlock a user's account.
- Edit a user's account information, jurisdiction, or role.



- See a log of changes to a user's account.
- Give a user access to the Sara Alert API.

Section 14, starting on **page 150**, covers how to use the Admin Panel.



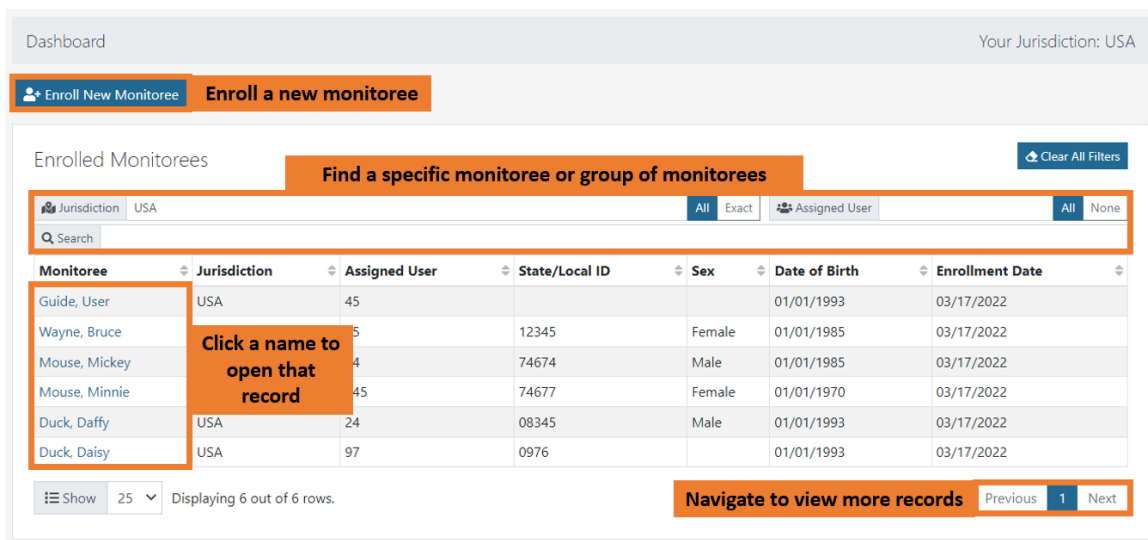
**Figure 15: You can manage users from the Admin Panel.**

### 3.4.4 Enroller Dashboard

The Enroller Dashboard is a limited view that you can only access as an Enroller user to see and manage the monitorees you have enrolled, as well as to enroll new monitorees.

You can use the Enroller Dashboard to:

- **Manually enroll new monitorees** using the enrollment wizard. Manual enrollment is covered in Section 9.1, starting on **page 50**.
- **View and edit enrollment information for monitorees you enrolled** by clicking their name. See Section 10.1.1 on **page 60** for more information.



**Figure 16: Enroller users have a special dashboard view.**

### 3.4.5 Enroller Analytics

The Enroller Analytics view is a limited view that you can only access as an Enroller user to see basic information about the monitorees you have enrolled and all monitorees enrolled in your jurisdiction.

The Enroller Analytics view shows:

- **The number of monitorees enrolled** by you (right) and your jurisdiction overall (left).
- **The total reports submitted** for monitorees you enrolled (right) and all monitorees in your jurisdiction (left)

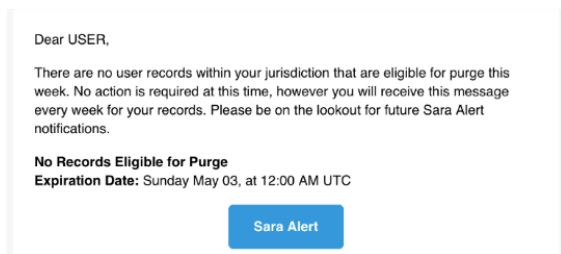
Analytics		# of monitorees enrolled		Your Jurisdiction: USA	
System Statistics		Your Statistics			
TOTAL MONITOREES	NEW LAST 24 HOURS	TOTAL MONITOREES	NEW LAST 24 HOURS		
626	6	6	6		
TOTAL REPORTS	NEW LAST 24 HOURS	TOTAL REPORTS	NEW LAST 24 HOURS		
106	0	0	0		
		# of reports submitted			

**Figure 17: Enroller users have a special analytics view.**

### 3.5 Record Retention

To minimize the amount of identifiable information stored on the production servers, Sara Alert™ will **purge records of identifiers** if there have been no changes to a record for a defined time period, provided that a monitoree is no longer being actively monitored. For COVID-19, the time has been configured for 10 days after the last record update (e.g., an update includes any action on the record, including adding comments or updating any fields). All records that have met the purge criteria since the last system purge date will be eligible for purge unless the record is updated. The expected purge date for a record is displayed on the closed line list. If a jurisdiction would like to retain the records, users will need to select **“Export for Purge Eligible Monitorees.”**

On **Thursdays at noon UTC**, the system will flag all records that are forecasted to be eligible to be purged of identifying information on Saturday at 11:59 pm UTC (e.g., For COVID-19, records that at Saturday 11:59 UTC will have not been updated for 14 days). An email notification will be sent to local Administrators and Super Users indicating how many, if any, purge-eligible records are in the user’s jurisdiction. Administrators will need to coordinate with a Public Health user, Public Health Enroller, Contact Tracer, or Super User to export records for retention before purge if necessary while Super Users are able to export records themselves.



**TIP:** Use an online converter to convert UTC to your local time zone.

**Figure 18: Sample notification to administrators**

The system will purge records flagged Thursday on **Saturday at 11:59 pm UTC**. If a record flagged for purge is updated before Saturday at 11:59 pm UTC, the record will not be purged.

The system retains a subset of information after purging identifiers from a monitoree’s record to enable the Sara Alert™ system to aggregate data for all monitorees that have ever been monitored within a jurisdiction. Monitoree records that have been purged of identifiers will no longer appear in the monitoring line lists. The data elements listed below are kept for each record after purge:

- Age
- Sex at Birth
- Race(s)
- Ethnicity
- Record Creation Time
- Last Record Update Time
- Record Creator (username)
- Assigned jurisdiction
- Symptom onset date
- Sara Alert ID of HoH (if applicable)
- Workflow (at time of purge)
- Address county
- Reason for closure
- Exposure Risk Assessment
- Monitoring Plan
- Was a close contact of a known case (true/false)
- Was a member of Common Exposure Cohort (true/false)
- Traveled to affected country or area (true/false)
- Laboratory personnel (true/false)
- Healthcare personnel (true/false)
- Was in a healthcare facility with known cases (true/false)
- Was crew member of a passenger or cargo flight (true/false)



## 4 USER ROLE OVERVIEWS

Each jurisdiction using Sara Alert™ can create and manage accounts for their users. The **Administrator** and **Super User** roles control who in your jurisdiction has a Sara Alert account. They also can set the role for each user. There are seven Sara Alert user roles, each with a different set of capabilities. A user may only have one role per account/email address. A user should be assigned a role with the fewest capabilities and least record access required to perform their job (i.e., if a user only needs to be able to enroll monitorees, a Super User account would not be appropriate). See **page 150** for more information on how Administrators and Super Users manage users in their jurisdiction.

**TIP:** See the [Quick Start Guide for User Types](#)

Table 2 gives an overview of the different capabilities available to each role:

**Table 2 Functional Summary by Role**

Capability	Enroller	Public Health	Public Health Enroller	Contact Tracer	Analyst	Administrator	Super User
Enroll New Exposed Monitoree	✓		✓	✓			✓
Enroll New Case	✓		✓	✓			✓
Add Close Contacts		✓	✓	✓			✓
Enroll Close Contacts			✓	✓			✓
View/Modify Enrollment Details	✓	✓	✓	✓			✓
View Monitoring Line Lists		✓	✓	✓			✓
View/Modify Monitoring Actions		✓	✓	✓			✓
View/Add/Modify Daily Reports		✓	✓	✓			✓
View/Add Lab Reports		✓	✓	✓			✓
View/Add Vaccinations		✓	✓	✓			✓
Flag Monitoree for Follow-Up		✓	✓	✓			✓
Transfer Records		✓	✓				✓
View History/Add Comments		✓	✓	✓			✓
Import records		✓	✓				✓
Export Records		✓	✓				✓
View and export analytics		✓	✓		✓		✓
Add/modify system users						✓	✓
View list of system users						✓	✓
Record Access	Only records added by the user	All records in jurisdiction	All records in jurisdiction	All records in jurisdiction	None; View Aggregate Data Only	None; Manage users in jurisdiction	All records and users in jurisdiction

### 4.1 Enroller Role



An **Enroller** is a trusted user who can add new monitorees into Sara Alert™ who require public health monitoring. Enrollers can enroll monitorees into either the exposure or isolation workflow.

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

### 4.1.1 What Data can Enrollers Access?

- ✓ Enrollers can access these views:
  - Enroller Dashboard
  - Enroller Analytics
- ✓ Enrollers have limited access to records that they added to the system only.
- ✓ Enrollers can only view or modify data elements that can be entered during enrollment including demographics, exposure history, and planned travel;
- ✗ Enrollers **cannot** view monitoring actions, report information, lab reports, vaccinations, close contacts, or history.

### 4.1.2 What can Enrollers do?

- ✓ Enroll a new monitoree
- ✓ Assign record to another jurisdiction that the enroller has access to (e.g., State enroller can assign cases to local jurisdiction within state)
  - The user's jurisdiction is the default jurisdiction assigned to a record.
- ✓ View and modify enrollment details of monitorees enrolled by user
- ✓ View summary enrollment statistics by user and user jurisdiction
- ✗ **Cannot** see or edit monitoring actions, daily reports, close contacts, lab reports, vaccinations, or history
- ✗ **Cannot** view the analytics summary
- ✗ **Cannot** view the monitoring dashboards or line lists
- ✗ **Cannot** import monitorees into Sara Alert
- ✗ **Cannot** export any data from Sara Alert
- ✗ **Cannot** manage users
- ✗ **Cannot** set or see a monitoree's follow-up flags

## 4.2 Public Health Role



A **Public Health** user is a trusted user who can manage the public health monitoring of enrolled monitorees in both the exposure and isolation workflows.

**TIP:** See the [Monitoring Dashboards Quick Start Guide](#)

### 4.2.1 What Data can Public Health Users Access?

- ✓ Public Health users can access these views:
  - Monitoring Dashboards
  - Analytics
- ✓ Public Health users can view all data elements associated with a record.
- ✓ Public Health users can only access records associated with their assigned jurisdiction.

### 4.2.2 What can Public Health Users do?

- ✓ View the monitoring dashboards and line lists of monitorees in their jurisdiction
- ✓ View and modify enrollment details of monitorees in jurisdiction, including contact and exposure information

- ✓ Set monitoring actions to move monitorees between line lists, workflows, and jurisdictions or to document public health actions
- ✓ View, add, and modify (to correct errors) monitoree reports
- ✓ View and add comments to record history
- ✓ View and export their jurisdiction's analytics summary
- ✓ Import a list of monitorees to enroll them in Sara Alert
- ✓ Export monitoree record data
- ✓ View, add, edit, and delete close contacts, lab results, and vaccinations for a monitoree
- ✓ Manually flag a monitoree for follow-up
- ✗ **Cannot** manually enroll monitorees
- ✗ **Cannot** manage users

## 4.3 Public Health Enroller Role



A **Public Health Enroller** is a trusted user who **has all the capabilities of a Public Health user but can also enroll new monitorees**. This role should be assigned only if a user needs to perform the duties of both roles.

### 4.3.1 What Data can Public Health Enrollers Access?

- ✓ Public Health Enrollers can access these views:
  - Monitoring Dashboards
  - Analytics
- ✓ Public Health Enrollers can view all data elements associated with a record.
- ✓ Public Health Enrollers can only access records associated with their assigned jurisdiction.

### 4.3.2 What can Public Health Enrollers do?

- ✓ Manually enroll monitorees
- ✓ View the monitoring dashboards and line lists of monitorees in their jurisdiction
- ✓ View and modify enrollment details of monitorees in jurisdiction, including contact and exposure information
- ✓ Set monitoring actions to move monitorees between line lists, workflows, and jurisdictions or to document public health actions
- ✓ View, add, and modify (to correct errors) monitoree reports
- ✓ View and add comments to record history
- ✓ View and export their jurisdiction's analytics summary
- ✓ Import a list of monitorees to enroll them in Sara Alert
- ✓ Export monitoree record data
- ✓ View, add, edit, and delete close contacts, lab results, and vaccinations for a monitoree
- ✓ Manually flag a monitoree for follow-up
- ✗ **Cannot** manage users

## 4.4 Contact Tracer Role



A **Contact Tracer** is a trusted user who can manage the public health monitoring of monitorees and fully access records, but cannot import monitorees, export data from the system, view the analytics summary, or transfer monitoree records.

### 4.4.1 What Data can Contact Tracers Access?

- ✓ Contact Tracers can access these views:
  - Monitoring Dashboards
- ✓ Contact Tracers can view all data elements associated with a record.
- ✓ Contact Tracers can only access records associated with their assigned jurisdiction.

### 4.4.2 What can Contact Tracers do?

- ✓ Manually enroll monitorees
- ✓ View the monitoring dashboards and line lists of monitorees in their jurisdiction
- ✓ View and modify enrollment details of monitorees in jurisdiction, including contact and exposure information
- ✓ Set monitoring actions to move monitorees between line lists and workflows, or to document public health actions
- ✓ View, add, and modify (to correct errors) monitoree reports
- ✓ View and add comments to record history
- ✓ View, add, edit, and delete close contacts, lab results, and vaccinations for a monitoree
- ✓ Manually flag a monitoree for follow-up
- ✗ **Cannot** manage users
- ✗ **Cannot** transfer records
- ✗ **Cannot** view or export their jurisdiction's analytics summary
- ✗ **Cannot** import a list of monitorees to enroll them in Sara Alert
- ✗ **Cannot** export monitoree record data

## 4.5 Analyst Role



An **Analyst** is a trusted user who can view the analytics summary but cannot perform any other capabilities of any other user type.

---

**TIP:** See the [Quick Start Guide for the Analytics Dashboard](#)

---

### 4.5.1 What Data can Analysts Access?

- ✓ Analysts can access these views:
  - Analytics
- ✗ Analysts **cannot** access or edit any records or view individual monitoree data

### 4.5.2 What can Analysts do?

- ✓ View and export analytics
- ✗ **Cannot** manage users
- ✗ **Cannot** access or edit any records or view individual monitoree data

## 4.6 Administrator Role



An administrator is a trusted user who can manage other Sara Alert™ users but cannot access monitoree records or view jurisdiction analytics.

---

**TIP:** See the [Sara Alert User Guide for Administrators](#)

---

### 4.6.1 What Data can Administrators Access?

- ✓ Administrators can access these views:
  - Admin Panel
- ✗ Administrators **cannot** access or edit any records or view individual monitoree data

### 4.6.2 What can Administrators do?

- ✓ Add new users
- ✓ Assign a user to a jurisdiction the Administrator has access to
- ✓ Assign user roles
- ✓ View list of users within assigned jurisdiction
- ✓ Add or edit notes about a user
- ✓ Lock or unlock user accounts
- ✓ Reset user passwords
- ✓ Edit user account information
- ✓ Manage 2FA authentication
- ✓ View a record of recent events logged to a user's account
- ✗ **Cannot** access or edit any records or view individual monitoree data
- ✗ **Cannot** view or export their jurisdiction's analytics summary

## 4.7 Super User Role



A **Super User** is a trusted user who can both manage users and manage public health monitoring for enrolled monitorees. They can perform **ALL** the capabilities of a Public Health Enroller and an Administrator.

### 4.7.1 What Data can Super Users Access?

- ✓ Super Users can access these views:
  - Monitoring Dashboards
  - Admin Panel
  - Analytics
- ✓ Super Users can view all data elements associated with a record.
- ✓ Super Users can only access records associated with their assigned jurisdiction.

### 4.7.2 What can Super Users do?

- ✓ All capabilities of a Public Health Enroller
- ✓ All capabilities of an Administrator

## 4.8 Monitoree

A monitoree is not a user. A monitoree is a subject with potential exposure (exposed monitoree) or disease (case) who has been enrolled by a trusted user for public health monitoring. The system will send an automated daily report via the monitoree's or case's preferred reporting method. A monitoree does not have a system login.

### 4.8.1 Record Access

- ✖ A monitoree **cannot** access any record information; monitorees can only see and respond to the automated daily report
- ✖ A monitoree **cannot** edit data associated with their or any other record

### 4.8.2 Monitoree Capabilities

- ✓ Submit daily reports for themselves
- ✓ Submit daily reports on behalf of their reporting household members if they are enrolled as the Head of Household
- ✓ Monitorees who are in a household but are not a Head of Household will not receive or submit automated daily reports

---

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

---

## 5 MONITOREE RECORD OVERVIEW

When you click on monitoree's record, information is presented in the six sections described below. Each section of the record can only be viewed by users that are indicated below:

**Table 3: Monitoree Record Access by User Type**

Record Section	Enroller	Public Health	Public Health Enroller	Contact Tracer	Analyst	Administrator	Super User	Page #
<i>Monitoree Details</i>	✓	✓	✓	✓			✓	23
<i>Monitoring Actions</i>		✓	✓	✓			✓	28
<i>Reports</i>		✓	✓	✓			✓	29
<i>Lab Reports</i>		✓	✓	✓			✓	34
<i>Vaccinations</i>		✓	✓	✓			✓	35
<i>Close Contacts</i>		✓	✓	✓			✓	35
<i>History</i>		✓	✓	✓			✓	36

Changes to the data elements in the Monitoree Record may change the line list that the monitoree appears in on the dashboard. Changes are logged in the history section of the record. Some data elements in the monitoree record are used in both workflows while others are more workflow specific. Data elements that are intended for use in a specific workflow are noted in each section below. A video tutorial for this section is available at: <https://saraalert.org/public-health/training/>

### 5.1 Monitoree Details/Enrollment Wizard

The Enrollment Wizard organizes the Monitoree Details into 6 different screens that allow an **Enroller, Public Health Enroller, Contact Tracer, or Super User** to add information in a defined sequence. The Enrollment Wizard is used to collect the information described below. While **Public Health** users cannot enroll monitorees, they can update the records of enrolled monitorees by clicking “Edit” next to that Monitoree Details section of interest (see **page 61** for more details). **Monitorees enrolled through the user interface can be added to either the Exposure or Isolation workflows.** A description of the fields available in the Enrollment Wizard and saved in the Monitoree Details section of the monitoree record are described below.

#### 5.1.1 Monitoree Identification

- Select workflow to enroll monitoree (exposure or isolation)
- Includes name and demographic information, as well as any existing state/local/federal ID numbers.
- Once a monitoree is enrolled, their Sara Alert ID will appear in this section. The Sara Alert ID is automatically generated by the system and is unique to each record.
- Includes primary and secondary languages spoken by the monitoree. The primary language field is used to determine in what language the notifications from the system to the monitorees will be sent.
  - 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.

## 5.1.2 Monitoree Address

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

## 5.1.3 Monitoree Contact Information

### 5.1.3.1 Primary Contact

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

---

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

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- **“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 will receive notifications to submit daily symptoms reports (email, SMS text, phone, etc.).
  - Some fields are conditionally required depending on the selected Preferred Reporting Method.
  - Message and data rates may apply depending on the contact method selected.
  - If a monitoree's preferred reporting method is not yet known, the user may select **“Unknown”** and the monitoree will not receive notifications. This is the system default value.
  - If a monitoree is enrolled in the system but has requested not to receive notifications, the user may select **“Opt-Out”** for preferred reporting method and the monitoree will not receive notifications.
  - Monitorees with **“Opt-Out”** or **“Unknown”** selected will appear on the non-reporting line list the day after enrollment unless a user submits a report on their behalf.

---

**TIP:** If **“unknown”** or **“opt out”** is the current preferred reporting method, a user will need to update the reporting method (email, SMS, or phone) for the monitoree to begin receiving daily notifications.

---



- 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.
- The system will display a warning if a user attempts to enter a phone number that is currently blocking texts from Sara Alert. See **page 168** for more details.
- **“Preferred Contact Time”** determines when the monitoree will be messaged by the system.
  - **Morning** is between 8 AM and noon in the monitoree’s local time zone.
  - **Afternoon** is between noon and 4 PM in the monitoree’s local time zone.
  - **Evening** is between 4 PM and 8 PM in the monitoree’s local time zone.
  - **Custom** allows a user to select a time between Midnight and 23:00 (11 PM) in the monitoree’s local time zone. The hour selected is the **earliest** time a monitoree may receive reminders from the system (i.e., their report may be sent slightly after this time, but not before). If the monitoree reports via a Preferred Reporting Method that sends reminder messages (see **page 161**), the monitoree may receive those messages for up to four hours after the selected Custom contact hour.
  - The local time zone for monitorees is determined by the monitoree’s **address state data elements** located on the “Monitoree Address” enrollment screen. The time zone for each state has been assigned based on each state’s population center.
    - If address state is left blank, the eastern time zone is used by default.

---

**TIP:** If the user **does not** specify a preferred contact time, the system will send daily requests during the “Afternoon” contact times.

---

### 5.1.3.2 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.

### 5.1.4 Monitoree Arrival Information

Fields on this screen are optional since all monitorees will not have travel history. If travel history is available, it should be entered into the system.

### 5.1.5 Additional Planned Travel

Fields on this screen are optional since not all monitorees will plan to travel during their monitoring period.

### 5.1.6 Monitoree Potential Exposure or Case Information

Some of the fields on the final screen on the enrollment wizard differ depending on which workflow is selected (exposure or isolation) on the first screen. These are described below.

### 5.1.6.1 Exposure Workflow

- **Last Date of Exposure:** Used by the system to determine the monitoring period for exposed monitorees. The field will be auto populated with the Last Date of Exposure that was entered when the record was created or imported.
  - A user may enter a date that is up to 30 days after the current date.
  - 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.
  - The system allows either a Last Date of Exposure to be entered OR Continuous Exposure turned ON. This ensures that a user clearly indicates if the monitoring period should be calculated based on a known exposure or extended indefinitely due to an ongoing exposure.
- **Continuous Exposure:** A user can turn this “ON” if the monitoree is being continuously exposed (e.g., from living with someone who is a confirmed case).
  - When Continuous Exposure is turned “ON,” Sara Alert™ will extend the monitoree’s monitoring period indefinitely until **either**:
    - The record is closed (in which case Continuous Exposure will be automatically turned off); **or**
    - Continuous Exposure is turned off and a Last Date of Exposure is entered by a user. Once a Last Date of Exposure is entered, the end of the monitoring period will be calculated as Last Date of Exposure + monitoring length (e.g., for COVID-19, this is 10 days after Last Date of Exposure).
  - The system allows either a Last Date of Exposure to be entered OR Continuous Exposure turned ON. This ensures that a user clearly indicates if the monitoring period should be calculated based on a known exposure or extended indefinitely due to an ongoing exposure.
- **Exposure Risk Factors:** Allows users to indicate if a monitoree has a specific risk factor
  - Some exposure risk factors have free text fields to allow for specific exposures to be documented.
  - In instances where there may be multiple applicable answers (e.g., the monitoree visited multiple healthcare facilities with known cases), use commas to separate multiple specified values.
  - Use the “**Close Contact of a Known Case ID**” field to assist with identifying common exposures to the same case. Users can filter records based on this 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.

**Note:** You can add or edit exposure information for a case in the Isolation Workflow by clicking “Edit” next to “Potential Exposure Information” in the Monitoree Details section of their record.

### 5.1.6.2 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** is used by the system to determine the start of a symptomatic case's isolation monitoring period. For COVID-19, this field is used to determine if the *symptomatic non-test-based* recovery definition has been met. A user may not enter a future date into this field.
- A positive **Lab Result** with a Specimen Collection Date is used by the system to determine the start of an asymptomatic case's isolation monitoring period. For COVID-19, this field is used to determine if the *asymptomatic-test-based* recovery definition has been met.
- **Case Status** can be set to “Confirmed” or “Probable” for individuals in the Isolation Workflow.
  - Users should assign case status according to current guidelines provided by their jurisdiction. For reference, the latest CSTE surveillance case definitions can be found at: <https://www.cste.org/page/PositionStatements>.

### 5.1.6.3 Both Workflows

- The **Assigned Jurisdiction** field can be updated on enrollment.
  - The default jurisdiction will match the user's jurisdiction displayed in the upper right-hand corner of the screen.
  - The list of available jurisdictions at enrollment will only be populated with jurisdictions to which the user has access to (e.g., State enroller can assign cases to a local jurisdiction within state)
    - If a record needs to be transferred to a jurisdiction that the user does not have access to, a Public Health user, Public Health Enroller, or Super User will need to transfer the record after enrollment.
- The **Assigned User** field is used to identify the user or group within a jurisdiction responsible for monitoring a monitoree
  - Each jurisdiction should determine their own Assigned User identification conventions (e.g., assign user number to each user, assign user number to groups or teams, assign user number to call center stations, etc.).
  - Each jurisdiction within the jurisdictional hierarchy can assign any allowed assigned user numbers; thus a state user and county user within that state can be assigned the same assigned user number unless a coding convention is established at the state level to prevent this. Thus, both the assigned jurisdiction and assigned user fields uniquely identifies each assigned user.
  - This field does not change who can see or modify a record, it is instead intended to help jurisdictions organize and track which of their personnel are assigned to a given record.
  - This field is optional and can be updated later.
- 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.

## 5.2 Monitoring Actions

The following data elements can be modified to capture public health monitoring actions and are available to **Public Health users, Public Health Enrollers, Contact Tracers, and Super Users**. Assignment of these values should be based on most recent guidance. Any changes to the data elements listed below will be captured in the record history with the name of the user and a timestamp based on the local time zone reported by the user's web browser.

### 5.2.1 Both Workflows

- **Monitoring Status:** This data element distinguishes between monitorees that are or are not being actively monitored by public health.
  - If set to **Actively Monitoring**, the system will move the record to the appropriate monitoring line list based on reporting history and latest public health actions. The system will send daily report reminders to any active monitoree if they are eligible to receive them (see **page 162**).
  - If set to **Not Monitoring**, the records will be moved to the 'Closed' line list and the system will stop sending daily report reminders if the monitoree is not eligible to receive them (see **page 162**).
- **Case Status:** Allows a public health user to move a monitoree from Exposure Monitoring to the Isolation Monitoring based on case status or vice versa.
  - **Suspect, Not a Case, Unknown:** If one of these case statuses is selected, the record will remain or be returned to the Exposure workflow to continue monitoring until the end of the monitoring period.
  - **Confirmed or Probable:** If one these case statuses is selected the system will ask the user if the system should end monitoring or move the record to Isolation Monitoring.
  - Users should assign case status according to current guidelines provided by their jurisdiction. For reference, the latest CSTE surveillance case definitions can be found at: <https://www.cste.org/page/PositionStatements>.
- **Assigned User:** Used to identify the user or group within a jurisdiction responsible for monitoring a monitoree.
  - Each jurisdiction should determine their own Assigned User identification conventions (e.g., assign user number to each user, assign user number to groups or teams, assign user number to call center stations, etc.).

- Each jurisdiction within the jurisdictional hierarchy can assign any allowed assigned user numbers; top-level jurisdictions may wish to create a system for using the Assigned User number that can apply throughout their sub-jurisdictions.
- This field does not change who can see or modify a record, it is instead intended to help jurisdictions organize and track which of their personnel are assigned to a given record.
- **Assigned Jurisdiction:** Allows public health users to control the jurisdiction who can view and modify the record. Records that have been transferred into or out of a user's jurisdiction will appear on the respective transfer line list.

### 5.2.2 Exposure Workflow

- **Exposure Risk Assessment:** Allows a public health user to document exposure risk. The purpose of this data element is to provide information to public health users who are prioritizing response to symptomatic and non-reporting individuals.
  - This data element does not impact the type or frequency of messages sent by the system to monitorees.
  - Users should assign Exposure Risk Assessment according to current guidelines provided by their jurisdiction.
- **Latest Public Health Action:** Allows a public health user to document public health actions related to a symptomatic monitoree under investigation to determine case status in the exposure workflow. The purpose of this data element is to move records from the symptomatic line list to the PUI line list in the exposure workflow.
  - Selecting any option other than “None” moves the record from the “Symptomatic” line list to the “PUI” line list in the exposure workflow.
  - To move a record off of the PUI line list in the exposure workflow, update ‘Case Status’ based on the findings of the investigation.
- **Monitoring Plan:** Allows a public health user to document the assigned monitoring plan. The purpose of this data element is to provide information to public health users who are prioritizing response to symptomatic and non-reporting individuals in the exposure workflow.
  - This data element does not impact the type or frequency of messages sent by the system to monitorees.
  - Users should assign Monitoring Plan according to current guidelines provided by their jurisdiction.

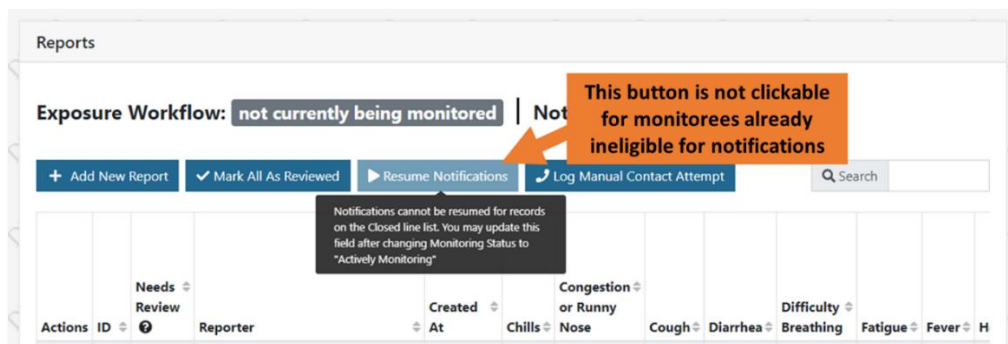
## 5.3 Reports

This section lists all of a monitoree's daily reports, including which (if any) symptoms were reported, the date and time of the report, who submitted the report (i.e., the monitoree or a public health user), and the current notification status (see **page 75** for icon description). Reports are available to **Public Health users, Public Health Enrollers, Contact Tracers, and Super Users**. Data elements or features that are intended for use in a specific workflow or function differently in each workflow are noted below.

### 5.3.1 Both Workflows

- **Add New Report (Page 97):** Allows a user to add a new daily report on behalf of a monitoree.
- **Pause/Resume Notifications:**
  - **Pause:** The system will stop sending an eligible monitoree daily report requests until a user resumes notifications. (See **page 162** for eligibility logic).
    - **Household Reporting:** If a user pauses notifications for a Head of Household (HoH), no notifications will be sent to the HoH for **any** household members. Since household members are not eligible to receive notifications (the HoH receives their notifications), the ability to pause notifications is not available for household members who are not the Head of Household.
  - **Resume:** The system will resume sending the monitoree automated daily reports once a day until notifications are either paused by a user or the monitoree is no longer eligible to receive messages (See **page 162** for eligibility logic).
    - Resuming notifications may not result in a daily report being immediately sent to the monitoree. The system will send a daily report at the monitoree's next preferred contact time.
  - This ability to pause/resume notifications is only available for monitorees who are:
    - **NOT** on a Closed line list; **AND**
    - Either a Head of Household **OR** not in a household (self-reporter)

**Tip:** Clicking "Resume" notifications **will not** immediately send a daily report to a monitoree. The system will send a message during the next occurrence of the monitoree's preferred contact time if the monitoree is eligible to receive a message.



**Figure 19: The ability to pause notifications is not available for records that are already ineligible**

- **Mark All as Reviewed (Page 85):** Selecting this button will change the "Needs Review" status in all unreviewed reports from "Yes" to "No." The purpose of this button is to remove the symptomatic flag from all reports if the reported symptoms are determined to be unrelated to the disease of interest. For example, if an individual being monitored for COVID-19 reported fever and sore throat, but it was determined they had an active case of a different disease, the "Mark All as Reviewed" button could be used to indicate that their symptomatic reports are not related to COVID-19. Users can also "review" individual reports.

- **Log Manual Contact Attempt (Page 96):** Allows a user to record successful and unsuccessful manual contact attempts made. Users require contact by public health in the following situations: 1) evaluate exposed individuals who have reported symptoms to determine clinical compatibility 2) evaluate cases who preliminarily meets the recovery definition to validate it is safe to discontinue isolation 3) re-establish contact with individuals on the non-reporting line lists.
- **Report Table Format:** If the monitoree reports symptoms that are compatible with symptomatic logic (**page 39**), that row will be highlighted red and the “Needs Review” column will show “Yes.”
- **Symptom Onset Date:** This field is auto populated with the date of the earliest report flagged as symptomatic (red highlighted) in the report history table unless a date has been entered by a user (e.g., symptom onset determined to differ from information available in report table); this is to reduce data entry burden on users and prevent the Symptom Onset Date field from being blank when a record is moved to the Isolation Workflow since it may be a required field to determine eligibility for 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. An explanation of the role of this field in each workflow is provided below.

### 5.3.2 Exposure Workflow Only

- **Symptom Onset Date:** If this field has a value in the Exposure Workflow, the monitoree will appear on the **Symptomatic** line list.
  - An Exposure monitoree with a blank Symptom Onset Date in may appear on the Asymptomatic or Non-Reporting line lists. Users should verify the Symptom Onset Date before moving a record to the Isolation Workflow.
  - A user should only manually enter a Symptom Onset Date for an Exposure monitoree if the monitoree is under investigation for the disease of interest and the actual symptom onset date differs from what data is available in the reports table based on the monitoree’s reported symptoms (see **page 39** for more details).
  - If all symptomatic reports (highlighted red) are marked as reviewed while a record is in the Exposure Workflow, the Symptom Onset Date will be blank since the monitoree has no known symptoms for the disease of interest.
- **Last Date of Exposure:** Used by the system to determine the monitoring period for Exposure monitorees. The field will initially be filled with the Last Date of Exposure that was entered when the record was created or imported.
  - A user may enter a date that is up to 30 days after the current date.
  - The system allows either a Last Date of Exposure to be entered OR Continuous Exposure turned ON. This ensures that a user clearly indicates if the monitoring period should be calculated based on a known exposure or extended indefinitely due to an ongoing exposure.
- **End of Monitoring:** Calculated from Last Date of Exposure, where the length of the monitoring period depends on the disease being monitored. For example, for COVID-19 monitoring, the End of Monitoring period is automatically set to 10 days after the Last Date of Exposure.

- If Last Date of Exposure is left blank on import, End of Monitoring will be calculated using the date the monitoree was enrolled, until a Last Date of Exposure is entered
- **Continuous Exposure:** A user can turn this “ON” if the monitoree is being continuously exposed (e.g., from living with someone who is a confirmed case).
  - When Continuous Exposure is turned “ON,” Sara Alert™ will extend the monitoree’s monitoring period indefinitely until **either**:
    - The record is closed (in which case Continuous Exposure will be automatically turned off); **or**
    - Continuous Exposure is turned off and a Last Date of Exposure is entered by a user. Once a Last Date of Exposure is entered, the end of the monitoring period will be calculated as Last Date of Exposure + monitoring length (e.g., for COVID-19, this is 10 days after Last Date of Exposure).
  - The system allows either a Last Date of Exposure to be entered OR Continuous Exposure turned ON. This ensures that a user clearly indicates if the end of monitoring period should be calculated based on a known exposure or extended indefinitely due to an ongoing exposure.

### 5.3.3 Isolation Workflow Only

- **First Positive Lab:** This field may be used by the system to determine if a monitoree in the Isolation Workflow is eligible to appear on the Records Requiring Review line list (page 44). For COVID-19, Sara Alert uses this field to determine the start of the isolation monitoring period for asymptomatic cases.
  - This column will be populated with the Specimen Collection Date of the earliest lab result with a “positive” result, if available. For asymptomatic cases, this allows users to see how many days it has been since the earliest positive lab result.
- **Symptom Onset Date:** This field 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, Sara Alert uses this field to determine the start of the isolation monitoring period for symptomatic cases.
  - If a record is moved from the Isolation Workflow to the Exposure Workflow (e.g., case ruled out and returned to monitoring due to exposure), the system will clear this field; this allows the system to place a monitoree on the appropriate monitoring line list in the exposure workflow based on any new daily reports.
- **Extend Isolation To Date:** This field is used by the system to determine if a monitoree in the Isolation Workflow is eligible to appear on the **Records Requiring Review** line list (see page 44 for more details about this line list). If an **Extend Isolation To Date** has been entered for a monitoree, they will not be eligible to appear on the **Records Requiring Review** line list until that date has passed (see page 90).
  - A user may enter a date that is between 30 days before and 30 days after the current date.
  - There is no set monitoring period for cases in the Isolation Workflow. Instead, the system automatically flags monitorees as potentially meeting one of Sara Alert’s internal recovery definitions based on their symptom status and either the first



positive lab result specimen collection date or the Symptom Onset Date (see **page 44**). These monitorees are moved to the Records Requiring Review line list. A user can override this by extending isolation, as explained on **page 90**.

### 5.3.4 Daily Report Information Display Based on Monitoree Preferred Reporting Method

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

Monitorees receive slightly different automated report prompts depending on their preferred reporting method. The Sara Alert team recommends users to promote contact methods that send monitorees a weblink (via email or SMS), since more granular information about symptoms can be collected.

#### 5.3.4.1 For weblink reports (via SMS or email) and reports entered manually by a Sara Alert™ user:

Monitorees who are not a member of a reporting household respond to a **series of yes/no questions** about presence or absence of **each** of the monitored symptoms.

- The report will explicitly document which symptom(s) a monitoree reported or did not report (e.g., every symptom column will be populated with “Yes” or “No”)
  - If symptoms reported meet the symptomatic logic (**page 39**), the appropriate column displays “Yes,” the report is shaded red and “Needs Review” is set to “Yes”
  - If no symptoms are checked or monitoree selects “I am not experiencing any symptoms,” all symptom columns are filled with “No” and the report is not highlighted in red

If a **monitoree is a Head of Household (HoH) reporter**, they will receive unique web-links to report symptoms for each household member. Each household member’s symptom table will reflect what is reported specifically for them.

Exposure Workflow: **symptomatic** | Notification status is

+ Add New Report   ✓ Mark All As Reviewed   || Pause Notifications   ↗ Log Manual Contact Attempt

Search

Actions	ID	Needs Review	Reporter	Reported At	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	Used A Fever Reducer
	1386	Yes		10/08/2020 15:21 EDT	No	No	No	No	Yes	No	No	No	No	No	No	No	No	No	No	No

For weblink reporting methods, each symptom listed

Figure 20: Example symptomatic web-link report showing value for each symptom

#### 5.3.4.2 For SMS Text (non-weblink) and Telephone Call reports:

Monitorees who are not a member of a reporting household respond to a **single yes/no question** about presence or absence of **the group of monitored** symptoms.

- If a monitoree responds “no,” the symptom columns are filled with “No” and the monitoree is moved to the appropriate line list.
- If monitoree replies “yes,” the report row is shaded red and the symptom column values are left blank since the system does not know which symptom the monitoree is reporting but knows at least one has been reported. This is enough information to flag the report for public health follow-up. This has implications for the line list that the monitoree will appear on, depending on which workflow they are in:
  - **Exposure Workflow:** Monitoree record is moved to the Symptomatic line list

- **Isolation Workflow:** The monitoree can appear on the Reporting or Records Requiring Review line lists (see **page 44** for other conditions that must be met).
  - A “Yes” response does **not** prevent a case who would otherwise preliminarily meet any recovery definition that includes symptom criteria (e.g., no fever without use of fever-reducing medication, etc) from appearing on the Records Requiring Review line list since the system cannot determine from a non-specific report which report item the monitoree was responding to (e.g., whether the monitoree is experiencing fever or used a fever-reducing medication).
  - After interviewing the monitoree to find out which specific symptoms they are experiencing, if a user edits the report to include information that would result in the monitoree not meeting the recovery logic, the monitoree will not be eligible for the Records Requiring Review line list until the recovery logic is met again (see **page 44**).

If a **monitoree is a HoH reporter**, they will respond to one question asking if anyone in the household is experiencing symptoms.

- If HoH replies “yes,” the report row for every active household member is shaded red and the symptom column values are left blank since the system does not know which symptom the HOH is reporting or which household member is ill (Figure 21). This is enough information to flag the report for follow-up. The records of each household member should be updated once additional information is available. In this scenario, household members will appear on the following line lists, depending on the workflow:
  - **Exposure Workflow:** Every member of the household is moved to Symptomatic line list.
  - **Isolation Workflow:** Household members may appear on the Reporting or Records Requiring Review line lists (see **page 44** for conditions that must be met).
- If a HoH responds “no,” all symptom columns are filled with “No” and all the household records are moved to the appropriate line list

Exposure Workflow: **symptomatic** | Notification status is

[+ Add New Report](#)
[✓ Mark All As Reviewed](#)
[⏸ Pause Notifications](#)
[📞 Log Manual Contact Attempt](#)

For non-weblink reporting methods, specific symptoms are NOT listed

Actions	ID	Needs Review	Reporter	Reported At	Chills	Congestion or Runny Nose	Cough	Diarrhea	Difficulty Breathing	Fatigue	Fever	Headache	Muscle or 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
	2258	Yes	Monitoree	12/17/2020 18:15 EST																

Figure 21: Example symptomatic SMS text or voice report with blank columns.

## 5.4 Lab Results

In the Isolation Workflow, lab results can provide evidence that a monitoree is a case, document the start of the isolation period (e.g., for asymptomatic COVID-19 cases), and determine eligibility for a record to appear on the Records Requiring Review line list. Lab results may be entered whenever a monitoree is in either workflow.

A **Public Health user, Public Health Enroller, Contact Tracer, or Super User** may add the following data elements for a lab result (see **page 101** for how to add lab results):

- **Lab Test Type:** PCR, Antigen, or Antibody (IgG, IgM, IgA)
  - Provides information for users to review to determine if documented Lab Test Type is confirmatory, supportive, or other. The system **does not** use values in this field to determine eligibility for the Records Requiring Review line list in the isolation workflow. This is to: 1) increase sensitivity of the recovery logic and 2) allow for expert review of cases based on latest guidance (which may change between software releases).
- **Specimen Collection Date:** When the specimen was collected
  - For an asymptomatic case's first positive lab result, Sara Alert uses the Specimen Collection Date to determine the start of the isolation monitoring period for the *asymptomatic test-based* recovery logic.
- **Report Date:** Date the results were reported
  - The system **does not** use values in this field to determine eligibility for the Records Requiring Review line list in the isolation workflow.
- **Result:** Positive, Negative, Indeterminate, Other
  - The system may use values in this field to determine eligibility for a record to appear on the Records Requiring Review line list in the Isolation workflow. For COVID-19, this field is used to determine if the *asymptomatic* or *test-based recovery* logic has been met.

## 5.5 Vaccinations

The Vaccinations section of the record allows a user to document vaccinations (i.e., specific doses of a vaccine product) that have been administered to the monitoree. Vaccination information has no impact on Sara Alert's daily monitoring functionality or line list placement. The information is provided to help inform monitoring decisions made by users.

A **Public Health user, Public Health Enroller, Contact Tracer, or Super User** may add the following vaccination data elements for a vaccination dose (see **page 103** for how to add vaccinations):

- **Vaccine Group** (Required): A "Vaccine Group" groups multiple vaccines that vaccinate against a single disease together.
- **Product Name** (Required): The Product Name reflects the manufacturer's "trade name" of the vaccine.
- **Administration Date:** The date that the dose was administered.
- **Dose Number:** The sequential dose number of this vaccine administration, if the vaccine product requires multiple doses.
- **Notes:** Free-text field for any related notes about the vaccination.

## 5.6 Close Contacts

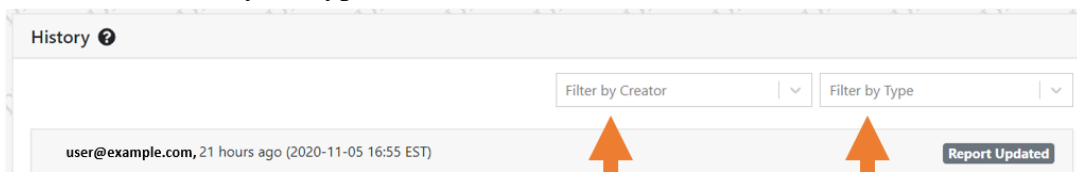
This section of the record is used to document a list of close contacts identified by monitoree during an interview and is available to **Public Health users, Public Health Enrollers, Contact Tracers, and Super Users**. Sara Alert™ allows users to quickly document basic information about these close contacts so they can later follow-up with them to determine if public health

monitoring is required. These close contacts can then be enrolled into the system for monitoring, if appropriate, after information required for enrollment is collected during follow-up.

**NOTE: Public Health** users do not have the ability to **enroll** individuals directly from the close contacts lists. Only **Public Health Enrollers, Contact Tracers, and Super Users** have this ability. See **page 103** for more details on how to add a close contact to a record, and **page 58** for how to enroll close contacts as monitorees in Sara Alert.

## 5.7 History

This section includes a history of changes made to the record by users, automated system actions, and comments added by users and is available to **Public Health** users, **Public Health Enrollers, Contact Tracers, and Super Users**. Record actions are tagged by type. The history section records the user who made the change and the date and time it occurred. The date/time is displayed in the time zone of the user's web browser. Users can filter history by the creator that initiated the action and by the type of action.



**Figure 22: User can filter History by Creator and Type**

### 5.7.1 History Tag Type Descriptions

- **Close Contact:** Notes when a Close Contact was added to the monitoree's record.
- **Close Contact Edit:** Notes when a close contact was edited or deleted.
- **Comment:** A comment was added to the record History.
- **Contact Attempt:** Notes that the system sent a **Report Reminder** to the monitoree but the system did not receive a response during the allowed response time. More information on this history tag is included in the section below. SMS opt-out notifications are also tagged with this history type.
- **Enrollment:** Notes the date and time a monitoree was enrolled into the system.
- **Follow-up Flag:** Notes when a Follow-up Flag was added to or cleared from the record.
- **Lab Result:** Notes when a lab result was added to the monitoree's record.
- **Lab Result Edit:** Notes when a lab result was edited or deleted.
- **Manual Contact Attempt:** Notes when a user logs a Manual Contact Attempt.
- **Monitoree Data Downloaded:** Notes when a user downloaded a monitoree's data and which export template was used.
- **Monitoring Change:** Notes any changes to fields in the Monitoring Actions section of a record, when notifications were paused/resumed, changes to Household Status, and changes to Symptom Onset Date or Last Date of Exposure.
- **Monitoring Complete Message Sent:** Notes the date and time the Sara Alert monitoring complete message was sent to the monitoree.
- **Record Automatically Closed:** Notes when the record was closed by the system.
- **Report Created:** Notes when a user added a report.
- **Record Edit:** Notes any changes made to a Monitoree's Details (i.e., DOB, Age, Language, Exposure Information, etc.).

- **Report Email Error:** Notes when a **Report Reminder** sent to a monitoree via E-mailed Web Link fails to deliver for any reason. See Appendix D for additional guidance.
- **Report Note:** Notes when a user added a note to a report.
- **Report Reminder:** Notes when the system sent a notification to a monitoree. More information on this history tag is included the section below.
- **Report Reviewed:** Notes when a user marked a single report as “Reviewed.”
- **Reports Reviewed:** Notes when the Mark All As Reviewed button was used in the Exposure workflow Reports section.
- **Report Updated:** Notes when a user made modifications to an existing report.
- **System Record Edit:** Notes when the system makes a change to a monitoree’s record.
- **Unsuccessful Report Reminder:** Notes when a **Report Reminder** sent to a monitoree via SMS or Telephone Call fails to be delivered, as well as an explanation for why the attempt failed. See Appendix D for a full description of error messages that may appear for Unsuccessful Report Reminders.
- **Vaccination:** Notes when a new vaccination was documented.
- **Vaccination Edit:** Notes when a vaccination was edited or deleted.
- **Welcome Message Sent:** Notes the date and time the Sara Alert welcome message was sent to the monitoree.

### 5.7.2 Timing of Report Reminder and Contact Attempt History Entries

For SMS and Telephone Call reporting methods, there is a delay between when an automated report is sent to the monitoree (**Report Reminder**) and when Sara Alert documents that the monitoree failed to respond (**Contact Attempt**). This gives the monitoree time to respond.

The **Response Time Allowed** for each of these contact methods is listed below:

- **SMS-Text Message:** “Contact Attempt” message posted to History 18 hours after text message was sent.
- **Telephone Call:** “Contact Attempt” message posted to History 1 hour after automated phone call. (Since the system will attempt to call the monitoree again if they do not pick up, there may be multiple “Report Reminder” and “Contact Attempt” history messages per day.

If a monitoree is set to receive SMS-Text Messages and their preferred contact time is “Morning,” the following scenario might occur:

- The system sends the monitoree the automated daily report text message at 10am.
- The system adds a “**Report Reminder**” entry to the record history to show a SMS Text-message was sent (with a 10am timestamp)
- The monitoree does not respond to the daily report within **18 hours**
- At 4am **the next day**, the system adds a “**Contact Attempt**” entry to the record history, indicting the monitoree did not respond to the reminder sent at 10am the previous day.

## MONITOREE RECORD OVERVIEW

As a result, there may be multiple history items per contact attempt.



**Figure 23: Sara Alert™ may create multiple history items per contact attempt**

**NOTE:** Sara Alert™ will never initiate a call or text to a monitree to collect a daily report before 8am or after 8pm local time.

## 6 EXPOSURE WORKFLOW LINE LIST OVERVIEW

Exposed monitorees appear on different line lists (accessed by tabs at the top of the dashboard) in the Exposure Workflow based on the following criteria described in more detail below:

- Monitoring Status
- Content of Daily Report
- Time since Last Report Submission
- Latest Public Health Action
- Changes to Assigned Jurisdiction

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**Tip:** See the [Quick Start Guide for Public Health Users: Exposure Workflow](#)

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The Exposure Workflow and line lists are viewable by the following types of users:

- Public Health users
- Public Health Enrollers
- Contact Tracers
- Super Users

Monitorees on the line lists below may receive messages from the system; eligibility criteria are described on **page 162**. The timing of these messages is described on **page 166**.

### 6.1 Active Monitoring Line Lists

The active monitoring line lists are for monitorees that are currently being monitored. Records where **Monitoring Status** is set to “**Actively Monitoring**” may only appear on one of the following line lists. Monitorees who require public health follow-up are located on either the **Symptomatic, Non-Reporting**, or **PUI (Person Under Investigation)** line lists. Follow-up with these monitorees should be based on current guidelines and available resources (i.e., CDC, etc.).

#### 6.1.1 Symptomatic Line List

Monitorees who reported symptoms that require review by a public health user to determine if disease is suspected; requires public health follow-up. The system checks the **Symptom Onset Date** field to determine if a monitoree should appear on the Symptomatic line list. If the monitoree has a **Symptom Onset Date** specified, they will appear on the Symptomatic line list. A monitoree’s **Symptom Onset Date** is generated in one of two ways:

- **Used-Defined** if a user manually enters a **Symptom Onset Date** in the record.
  - **IMPORTANT:** A Symptom Onset Date should only be entered by a user in the exposure workflow if the monitoree is under investigation for the disease of interest and the reported Symptom Onset Date differs from what is available in the reports table. If a user sets a Symptom Onset Date in the exposure workflow, the record will appear on the symptomatic line list.
  - The system will not overwrite or clear (if the “Review” function is used) a Symptom Onset Date manually entered by a user while the record is in the exposure workflow or if the record is moved to the Isolation Workflow. If disease is ruled out after investigation and the monitoree should continue to be monitored in the Exposure Workflow, a user

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**Tip:** Any changes to the “Symptom Onset Date” by the system or a user will be captured in the record “History” and tagged as a “Monitoring Change.”

---

must clear the Symptom Onset Date to move the record off the **Symptomatic** line list.

- A “person” icon indicates that the date is user-defined:



**Figure 24: A person icon indicates that the date is user-defined**

- **Auto-Populated** by the system as the date of the earliest report that needs review because the report submitted meets the symptomatic logic (unless a date was specified by a user).
  - **Symptomatic Logic:** This defines when a report will be flagged by the system as meeting the symptomatic logic. The default symptomatic logic is configured at the system level and conforms to the latest guidance available from CDC. Jurisdictions may add additional symptoms to the system defined symptomatic logic.
  - For COVID-19, the logic is currently based on [CSTE position statement Interim-20-ID-02](#). A report will meet the symptomatic logic if the following symptoms are reported:

**One or more of the following:**

- Cough
- Difficulty Breathing
- New Loss of Taste
- New Loss of Smell
- Shortness of Breath

**OR at least two of the following:**

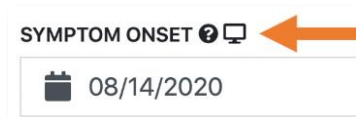
- Chills
- Congestion or Runny Nose
- Diarrhea
- Fatigue
- Fever
- Headache
- Muscle Pain
- Nausea or Vomiting
- Repeated Shaking with Chills
- Sore Throat

---

**Tip:** For monitorees who were enrolled in Sara Alert before v1.12 (9/10/20), New Loss of Taste and New Loss of Smell appear as a single column in the Reports table as “New loss of taste or smell.”

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- A “computer” icon indicates that the date is auto-populated by the system.



**Figure 25: A computer icon indicates that the Symptom Onset Date was auto-populated by the system.**

- **NOTE:** To learn more about the “Review” functionality and how to move a record off of the symptomatic line list, please see **page 85**.



### 6.1.2 Non-Reporting Line List

Monitorees who have not submitted a daily report within the expected time period (e.g., 24 hours) **and** do not have a **Symptom Onset Date**; require public health follow-up.

### 6.1.3 Asymptomatic Line List

Monitorees who submitted a report within the expected time period (e.g., past 24 hours) **and** do not have a **Symptom Onset Date**; do not require public health follow-up unless otherwise indicated. Monitorees who submit a report indicating they are not experiencing symptoms on their last day of monitoring (e.g., eligible to appear on the Asymptomatic line list) are automatically moved to the Closed line list by the system. The reason for closure will appear as “Completed Monitoring (system).” See **page 42** for more information on system closed records.

### 6.1.4 PUI Line List

Monitorees currently under investigation by public health to determine case status. Monitorees on the PUI line list will receive messages from the system. Since public health will be actively investigating and communicating with this individual, the monitoree may receive a system notification and be contacted directly by the health department on the same day.

## 6.2 Closed Line List

The closed line list is for monitorees who are no longer being monitored (e.g., completed monitoring period, lost to follow-up, etc.) by public health. A monitoree on this line list will not appear on any Active Monitoring line lists. Records where **Monitoring Status** is set to “**Not Monitoring**” appear on this list.

- Records will remain on the closed line list for a defined period before being purged (the exact period may differ based on the disease of interest). The closed line list shows the expected purge date (see **page 9**). These records can be exported if that information needs to be retained (see more info about exporting purge eligible monitorees on **page 134**).
  - For COVID-19, records on the closed line list that have not been updated for 14 days will be purged.
- Records on the closed line list are accessible to users until purged. Monitorees that may require additional monitoring can be moved back to an Active Monitoring line list by setting the Monitoring Status back to “Actively Monitoring.”

### 6.2.1 User-Selected Reasons for Closure

Whenever a record is manually closed by a user, a reason for ending monitoring should be selected. A list of available reasons for closures and suggestions for use are described below. Some of these reasons may be more applicable to monitorees in the Isolation workflow and others may be more applicable to monitorees in the Exposure workflow. The descriptions below are suggestions only; users should always follow their organization’s protocols when setting a monitoree’s Reason for Closure.

- **Completed Monitoring:** Select if a monitoree has completed their monitoring according to jurisdiction protocol

- **Meets criteria to shorten quarantine:** Select if a monitoree is being closed out in accordance with shortened quarantine guidance
- **Does not meet criteria for monitoring:** Select if monitoree was determined to not need monitoring in Sara Alert.
- **Meets Case Definition:** Select if the monitoree was confirmed as a case and the user's jurisdiction is not using Sara Alert™ to monitor cases in the Isolation Workflow.
- **Lost to follow-up during monitoring period:** Monitoree meets jurisdiction criteria for being considered lost to follow-up.
- **Lost to follow-up (contact never established):** Monitoree meets jurisdiction criteria for being considered lost to follow-up and contact was never established.
- **Transferred to another jurisdiction:** Monitoree has been transferred to a jurisdiction that is not participating in Sara Alert and the transfer functionality cannot be used.
- **Person Under Investigation (PUI):** Monitoree is a PUI and the user's jurisdiction manages the investigation in another system.
- **Case Confirmed:** Monitoree meets the confirmed case definition and user's jurisdiction is not using Sara Alert to monitor cases in the Isolation Workflow.
- **Meets criteria to discontinue isolation:** Public health has determined a case in the Isolation Workflow can safely discontinue isolation.
- **Fully Vaccinated:** Monitoree is fully vaccinated for the disease being monitored.
- **Deceased:** Monitoree is deceased.
- **Duplicate:** Identifies a record that is duplicative of another in Sara Alert. This record is not considered the master record.
- **Refused Monitoring:** Monitoree refused monitoring in Sara Alert.
- **Other**

## 6.2.2 System-Defined Reasons for Closure

Sara Alert™ automatically moves records in the exposure workflow that meet specific criteria to the Closed line list. The system checks every half hour for monitorees that meet these criteria:

- **Completed Monitoring (system):** The record was closed because the monitoree was asymptomatic and submitted a report indicating they were not experiencing symptoms on their last day of monitoring or any subsequent day.
- **Enrolled more than 10 days after last date of exposure (system):** The record was closed because it was created with a Last Date of Exposure more than 10 days prior to enrollment, Continuous Exposure is not selected, and the monitoree submitted at least one asymptomatic report. This means that the monitoree was added to Sara Alert after the end of the calculated monitoring period. Since the monitoring period has already passed, and the record is on the asymptomatic line list, the system will close these records. In previous releases, this reason for closure as recorded as "Past Monitoring."
- **Enrolled on last day of monitoring period (system):** The record was closed because it was created with a Last Date of Exposure equal to 10 days prior to the enrollment date, Continuous Exposure is not selected, and the monitoree submitted at least one asymptomatic report. This means that the monitoree was added to Sara Alert on the calculated end of monitoring date. Since a monitoree appears on the Asymptomatic line list immediately after enrollment, the record will meet the criteria for closure described above (e.g. on the asymptomatic line list on the end of monitoring date). The reason

recorded for records that meet this criteria differentiates them from records automatically closed for other reasons.

- **No record activity for 30 days (system):** The record was closed because the monitoree was on the Non-Reporting line list, the End of Monitoring date has passed, and no changes were made to the record in the past 30 days prior to close, including user changes and submitted reports. **Note:** report notifications sent by the system are not considered a change to the record.

## 6.3 Transfer Line Lists

The transferred line lists are for monitorees where the Assigned Jurisdiction has changed.

- **Transferred In:** Monitorees who were transferred to your assigned jurisdiction by a Sara Alert™ user in a different jurisdiction in the past 24 hours (i.e., due to a monitoree moving inside your jurisdiction from elsewhere).
  - A monitoree on this list will appear on the appropriate Active Monitoring or Closed line list based on record values.
- **Transferred Out:** Monitorees who have been transferred out of your assigned jurisdiction to another jurisdiction participating in Sara Alert™ (i.e., due to a monitoree moving outside your jurisdiction).
  - Users lose access to an individual's records when they are transferred out of their jurisdiction. If you need to maintain complete record data, we recommend exporting records for these individuals before transferring to a new jurisdiction.
  - Monitorees on this list will no longer appear after the record has been purged from the system. Once transferred, you will not have any visibility into when the record is expected to be purged. See **page 9** for more details about record retention.
  - If you need to transfer a record to a jurisdiction that is not participating in Sara Alert™, export the record then close it. Select "Transferred to another jurisdiction" as the reason. These records will not appear on the Transferred-Out line list.

## 6.4 All Monitorees Line List

The **All Monitorees** line list (located on the far right) shows all exposed monitorees in the jurisdiction who are currently in the exposure workflow. Use this view to search across all records in exposure monitoring.

## 7 ISOLATION WORKFLOW LINE LIST OVERVIEW

Monitorees are displayed on different line lists (accessed by tabs at the top of the dashboard) in the isolation workflow based on the following criteria described in more detail below:

- Monitoring Status
- Content of Daily Report
- Time since Last Report Submission
- Symptom Onset Date
- Lab Test Results
- Changes to Assigned Jurisdiction

The Isolation Workflow and line lists are viewable by the following user roles:

- Public Health
- Public Health Enrollers
- Contact Tracers
- Super Users

Monitorees on the line lists below may receive messages from the system; eligibility criteria are described on **page 162**. The timing of these messages is described on **page 166**.

### 7.1 Active Monitoring Line Lists

The active monitoring line lists are for cases that the health department is currently monitoring. Records where **Monitoring Status** is set to “**Actively Monitoring**” may only appear on one of the following line lists. Cases who may require public health follow-up are located on either the **Records Requiring Review** or **Non-Reporting** tab. Follow-up with these cases should be based on current guidelines and available resources (i.e., CDC, etc.).

#### 7.1.1 Records Requiring Review Line List

Cases who meet the recovery logic will appear on the Records Requiring Review line list. Any cases that appear on this line list require follow-up by public health to validate that it is safe to discontinue isolation. The system logic has been designed to be sensitive. As a result, cases that have not recovered completely may appear.

- The recovery logic is configured at the system level and conforms to the latest guidance.
  - For COVID-19, the logic is currently based on the *CDC Guidance for Ending Isolation and Precautions for People with COVID-19: Interim Guidance* (updated [January 14, 2022](#)).
- A case meets the criteria to appear on the requiring line list if any of the following conditions are met (logic below is for COVID-19):
  - Symptomatic non-test-based recovery definition:
    - >24 hours since last reported fever; **AND**
    - >24 hours since last reported use of fever-reducing medicine; **AND**
    - >5 days since onset of symptoms (based on Symptom Onset Date); **AND**
    - The **Extend Isolation To** date has passed or is blank.

- Asymptomatic non-test-based recovery definition:
  - > 5 days have passed since the first Specimen Collection Date of a laboratory test where the result is “positive;” **AND**
  - Monitoree has no Symptom Onset Date and no daily reports that are flagged as “Symptomatic” (i.e., meet the case definition); **AND**
  - Monitoree has at least one report; **AND**
  - The **Extend Isolation To** date has passed or is blank.
- Test-based recovery definition (not recommended except to discontinue isolation or other precautions earlier than would occur under the symptom-based strategy):
  - Two negative laboratory results documented in “Lab Results” table; **AND**
  - >24 hours since last reporting a fever to the system; **AND**
  - >24 hours since last reporting the use of fever-reducing medicine; **AND**
  - Monitoree has submitted at least one report; **AND**
  - The **Extend Isolation To** date has passed or is blank.

**NOTE:** Monitorees that reply “yes” to a text or phone call may be eligible to appear on the Records Requiring Review line list if other conditions above are met (like time since symptom onset). See **page 33** for more information about how Sara Alert interprets responses for non-specific reporting methods.

#### 7.1.1.1 Cases that are Ineligible for a Recovery Definition

If a case does not have a Symptom Onset Date or a positive lab result with a Specimen Collection Date, their record may never be automatically moved to the Records Requiring Review line list (unless additional information is added to the record). This could result in an elongated isolation monitoring period for the case. Sara Alert will provide warnings in the case’s record if they are missing both a Symptom Onset Date and a positive lab result with a Specimen Collection Date. Additionally, users can apply the “Ineligible for any recovery definition” Advanced Filter to identify these records (see **page 66** for how to apply Advanced Filters).

**Warning:** This case does not have a Symptom Onset Date or positive lab result and may never become eligible to end monitoring

**Figure 26: System warning if a record may never become eligible for the Records Requiring Review line list**

#### 7.1.2 Non-Reporting Line List

Cases who have not reported (e.g., presence or absence of symptoms) within the expected time period (e.g., 24 hours) **AND:**

- Have not yet met a recovery definition; **OR**
- Have an **Extend Isolation To** date that has not passed or is blank.

#### 7.1.3 Reporting Line List

Cases on this line list typically do not require follow-up. Cases who have reported within the expected time period (e.g., 24 hours), regardless of symptom status, **AND:**

- Have not yet met a recovery definition; **OR**
- Have an **Extend Isolation To** date that has not passed or is blank.

## 7.2 Closed Line List

The Closed line list is for cases who are no longer being monitored (e.g., met criteria to discontinue isolation, lost to follow-up, etc.). A case on this line list will not appear on any Active Monitoring line lists. Records where **Monitoring Status** is set to “**Not Monitoring**” appear on this list.

- Unlike Exposure monitorees, Isolation monitorees are not automatically closed at the end of their monitoring period. If you determine it is safe for a monitoree to end isolation, you must manually close their record.
- Records will remain on the Closed line list for a defined period before being purged (the exact period may differ based on the disease of interest). The Closed line list shows the expected purge date (see **page 9**). These records can be exported if that information needs to be retained (see info about exporting purge eligible monitorees on **page 134**). For COVID-19, records on the Closed line list that have not been updated for 14 days will be purged.
- Records on the Closed line list remain accessible to users until purged. Monitorees that may require additional monitoring can be moved back to an Active Monitoring line list by setting the Monitoring Status to “Actively Monitoring.”

### 7.2.1 User-Selected Reasons for Closure

When you are ready to close an Isolation monitoree’s record, you can choose from any of the options listed in the reasons for closure drop-down menu. See **page 41** for the list of user-selected reasons for record closure.

### 7.2.2 System-Defined Reasons for Closure

Sara Alert™ will only automatically close a record in the Isolation workflow for the reason listed below:

- **No record activity for 30 days (system):** The record was closed because the monitoree was on the Non-Reporting line list, it has been at least two days since the “Extend Isolation To” date (if the monitoree has one) and no changes were made to the record in the past 30 days prior to close, including user changes and submitted reports (see **page 5.3.3** for more information on the “Extend Isolation To” field). **Note:** report notifications sent by the system are not considered a change to the record.

Every half hour, the system will check to see if a record meets the above criteria. If it does, Sara Alert will close the record.

## 7.3 Transfer Line Lists

The following line lists are for case where the Assigned Jurisdiction has changed. A case may also appear on the appropriate Active Monitoring or Closed line list based on record values.

- **Transferred In:** Cases who were transferred to your jurisdiction by a Sara Alert user in a different jurisdiction in the past 24 hours (i.e., due to a case moving inside your jurisdiction from elsewhere).
  - A case on this list will appear on the appropriate Active Monitoring or Closed line list based on record values.
- **Transferred Out:** Cases who have been transferred out of your jurisdiction to another jurisdiction participating in Sara Alert (i.e., due to a monitoree moving outside your jurisdiction).
  - Users lose access to an individual's records when they are transferred out of their jurisdiction. If you need to maintain complete record data, we recommend exporting records for these individuals before transferring to a new jurisdiction.
  - Monitorees on this list will no longer appear after the record has been purged from the system. Once transferred, you will not have any visibility into when the record is expected to be purged. See **page 9** for more details about record retention.
  - If you need to transfer a record to a jurisdiction that is not participating in Sara Alert, export the record then close it. Select "Transferred to another jurisdiction" as the reason. These records will not appear on the Transferred-Out line list.

## 7.4 All Cases

The **All Cases** line list (located on the far right) shows all cases in the jurisdiction who are currently in the isolation workflow.

## 8 GLOBAL DASHBOARD LINE LIST OVERVIEW

All monitorees across the Exposure and Isolation workflow dashboards can be viewed using the Global Dashboard. The Global Dashboard and line lists are viewable by the following user roles:

- Public Health
- Public Health Enrollers
- Contact Tracers
- Super Users

### 8.1 Active Monitoring Line Lists

The active monitoring line lists are for monitorees that the health department is currently monitoring, across both the Exposure and Isolation Workflows. Records where **Monitoring Status** is set to “**Actively Monitoring**” may only appear on one of the following line lists. Monitorees who may require public health follow-up are located on either the **Priority Review** or **Non-Reporting** tab. Follow-up with these cases should be based on current guidelines and available resources (i.e., CDC, etc.).

The active monitoring line lists include a column that is unique to the Global Dashboard: the **Reporter ID** column. This column shows the Sara Alert ID of the monitoree’s Head of Household. Clicking on the ID number will navigate the user to the reporter’s record. If the monitoree is the Head of Household or if they self-report, their own Sara Alert ID is shown in this column.

Monitorees on the line lists below may receive messages from the system; eligibility criteria are described on **page 162**. The timing of these messages is described on **page 166**.

#### 8.1.1 Active Line List

Monitorees in both the Exposure and Isolation Workflow where Monitoring Status is set to “**Actively Monitoring**” will appear on the Active line list in the Global Dashboard.

#### 8.1.2 Priority Review Line List

Monitorees on the Symptomatic line list in the Exposure Workflow (**page 39**), and the Records Requiring Review line list in the Isolation Workflow (**page 44**) will appear on the Priority Review line list in the Global Dashboard.

#### 8.1.3 Non-Reporting Line List

Monitorees on the Non-Reporting line lists in the Exposure (**page 41**) and Isolation (**page 45**) Workflows will appear on the Non-Reporting line list in the Global Dashboard. These monitorees have not reported (e.g., presence or absence of symptoms) within the expected time period (e.g., 24 hours), and do not meet the criteria to appear on any other line lists in their respective workflows.

### 8.2 Closed Line List

The Closed line list is for monitorees who are no longer being monitored and are on the Closed line lists in the Exposure (**page 41**) and Isolation Workflows (**page 46**). A case on this line list



will not appear on any Active Monitoring line lists. Records where **Monitoring Status** is set to “**Not Monitoring**” appear on this list.

- In both the Exposure and Isolation workflows, some records meeting specific criteria are automatically moved to the Closed line. View the system defined reasons for closure for **Exposure** on page 42, and for **Isolation** on page 46.
- Records may also be closed manually after review from public health. View the user selected reasons for closure on page 41.
- Records will remain on the closed line list for a defined period before being purged (the exact period may differ based on the disease of interest). The closed line list shows the expected purge date (see **page 9**). These records can be exported if that information needs to be retained (see info about exporting purge eligible monitorees on **page 134**).
  - For COVID-19, records on the closed line list that have not been updated for 14 days will be purged.
- Records on the closed line list are accessible to users until purged. Monitorees that may require additional monitoring can be moved back to an Active Monitoring line list by setting the Monitoring Status back to “Actively Monitoring.”

### 8.3 All Monitoree Line Lists

The All Monitorees line list (located on the far right) shows all records in the jurisdiction across both the Exposure and Isolation workflow. Use this view to search across all your jurisdiction’s records in the system.

## 9 HOW TO ADD MONITOREES TO SARA ALERT

This section covers all the ways users can add monitorees to Sara Alert for daily automated monitoring. The table below shows the different ways users can add monitorees to Sara Alert, as well as the different user roles that have access to these capabilities.

**Table 4: Availability of enrollment capabilities by user type**

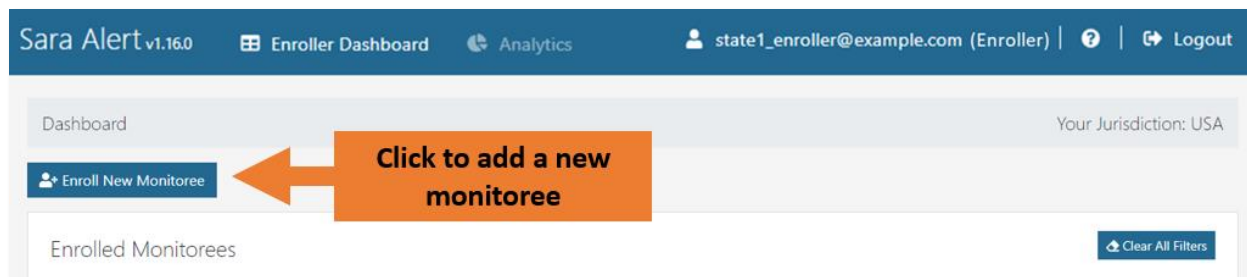
Capability	Enroller	Public Health	Public Health Enroller	Contact Tracer	Analyst	Administrator	Super User	Page #
<i>Manually Enroll a new Monitoree (through the Enrollment Wizard)</i>	✓		✓	✓			✓	50
<i>Import one or more Monitorees</i>		✓	✓				✓	52
<i>Enroll Monitorees from a Record's Close Contacts List</i>			✓	✓			✓	58

### 9.1 How to Manually Enroll New Monitoree (Contact or Case)

Manual enrollment through the Enrollment Wizard is available to the following user roles:

- Enrollers
- Public Health Enrollers
- Contact Tracers
- Super Users

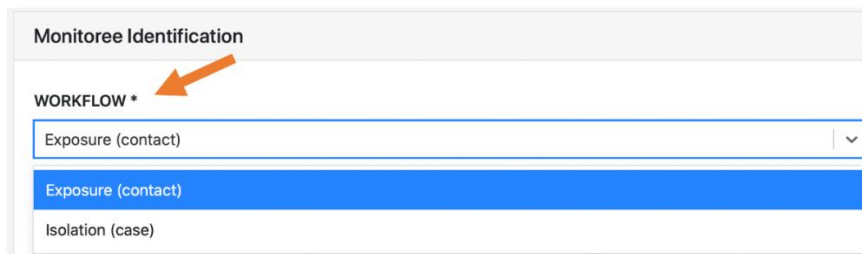
1) Click the “**Enroll New Monitoree**” button.



**Figure 27: Enroll new monitoree**

2) Select the appropriate workflow to enroll the monitoree in:

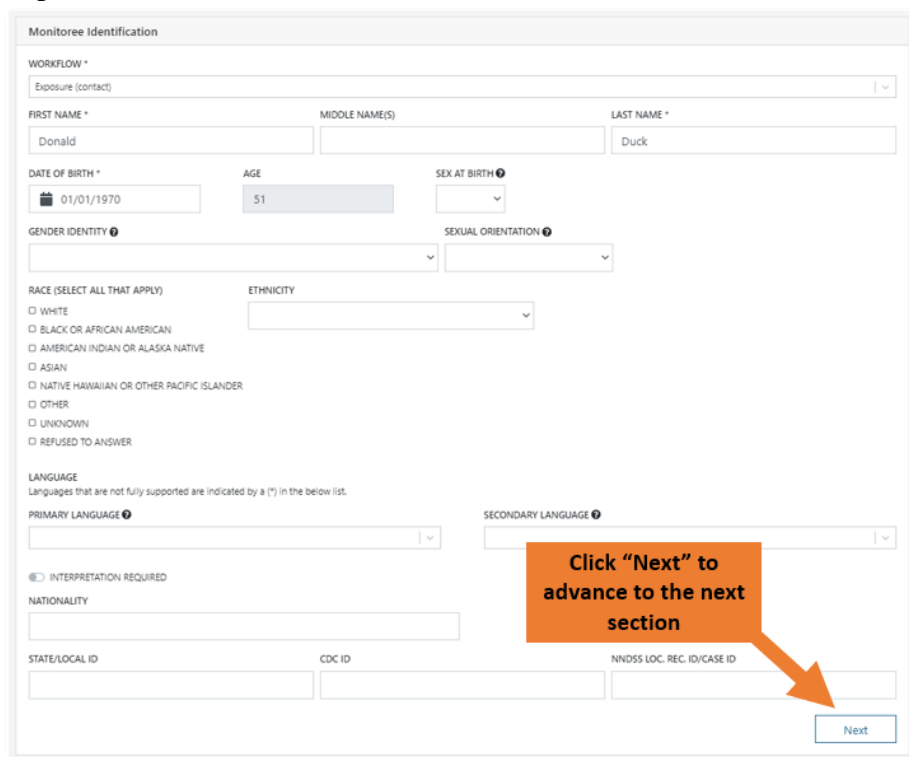
- **Exposure (contact):** Use this workflow if the new monitoree was potentially exposed
- **Isolation (case):** Use this workflow if the monitoree is a confirmed or probable case



**Figure 28: Select Exposure or Isolation workflow**

## HOW TO ADD MONITOREES TO SARA ALERT

3) Enter information on enrollment screens. To advance, click “**Next.**” To return to a previous screen, click “**Previous.**” Required fields (\*) must be completed before you can 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), NATIONALITY, STATE/LOCAL ID, CDC ID, and NNDSS LOC. REC. ID/CASE ID. An orange callout box with an arrow points to the 'Next' button, stating: 'Click “Next” to advance to the next section'.

**Figure 29. Enter new monitoree enrollment information**

4) The final page of the Enrollment Wizard differs based on workflow:

- **Exposure workflow:** Exposure Risk factor data elements. Users must either input a Last Date of Exposure or check Continuous Exposure to advance.
- **Isolation workflow:** Symptom Onset Date, positive Lab Result, and Case Status. Users must input either a Symptom Onset Date or positive Lab Result to advance.

5) Review the enrollment data 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 “**Finish**” is selected. If you navigate away from the enrollment wizard before selecting “**Finish**,” the record will not be saved.



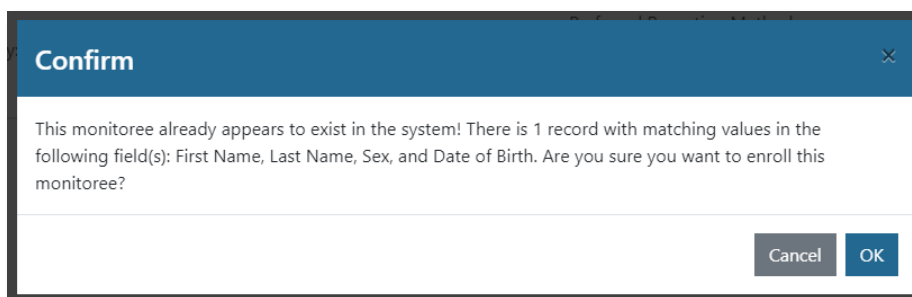
The screenshot shows the final enrollment screen with two main sections: 'POTENTIAL EXPOSURE INFORMATION' and 'NOTES'. The 'POTENTIAL EXPOSURE INFORMATION' section includes fields for Last Date of Exposure (12/05/2020), Exposure Location (Unknown), Exposure Country, and RISK FACTORS (Member of a household, AA). An orange callout box with an arrow points to the 'Edit' link, stating: 'Click “Edit” to edit that section'. The 'NOTES' section has a 'None' entry. At the bottom, there are four buttons: 'Previous', 'Finish and Add a Household Member', 'Finish', and 'Cancel'. An orange callout box with an arrow points to the 'Finish' button, stating: 'Click “Finish” to save the record'.

**Figure 30. Click “Finish” to save the record**

**NOTE:** If the monitoree's **Preferred Reporting Method and corresponding contact information (i.e., phone number or email address)** matches that of an existing record among records you have access to, the two records will be linked as a reporting household. See **page 125** for instructions on how to remove a record from a household.

6) Sara Alert identifies potential duplicates based on exact match of First Name, Last Name, Sex at Birth (if not blank), and Date of Birth (if not blank) **OR** an exact match of the State/Local ID at the time of enrollment. If the record is flagged as a potential duplicate, a message will appear informing the user which match criteria were met and asking if you want to create a potentially duplicate record.

- If a monitoree is imported or enrolled without a DOB and/or Sex at Birth, Sara Alert will now flag existing monitorees with the same First Name and Last Name (and DOB or Sex, as available) as potential duplicates. Sara Alert will continue to flag State/Local ID matches for the monitoree.
- A record will not be flagged as a potential duplicate if there is an exact match on First Name and Last Name, but different inputted values in the Sex at Birth or DOB fields.
- If a monitoree is imported without a First Name or Last Name, Sara Alert will only look at their State/Local ID when checking for potential duplicates.



**Figure 31: A confirmation box will appear for potential duplicate records**

## 9.2 How to Import One or More Monitorees Into Sara Alert

Users can import two different types of files into Sara Alert™ to bulk enroll exposed monitorees or cases. Data from other systems can be mapped to the available templates to reduce data entry burden of enrolling monitorees. The following user types can import monitorees into Sara Alert:

- Public Health Users
- Public Health Enrollers
- Super Users

### 9.2.1 Epi-X Import Format Description

Sara Alert™ can import data from the spreadsheets distributed to jurisdictions via Epi-X notifications. The Epi-X import feature populates a limited subset of Sara Alert enrollment data elements. After import, enrollment should be completed by a public health user by adding additional information necessary for Sara Alert monitoring. Please contact the Sara Alert team at [saraalert-adopt@mitre.org](mailto:saraalert-adopt@mitre.org) if you are interested in the specific data elements that are supported and the required format to import Epi-X notification spreadsheets.

## 9.2.2 SAMS Secure Data Exchange (SDX) Format Description

Sara Alert™ can import data from the spreadsheets distributed to jurisdictions via the Secure Access Management Service (SAMS) Secure Data Exchange (SDX) format. The SDX import feature populates a limited subset of Sara Alert enrollment data elements and may not include fields necessary for automated reports to be sent from Sara Alert. After import, enrollment should be completed by a public health user by adding additional information necessary for Sara Alert monitoring. Please contact the Sara Alert team at [saraalert-adopt@mitre.org](mailto:saraalert-adopt@mitre.org) if you are interested in the specific data elements that are supported and the required format to import SDX spreadsheets.

## 9.2.3 Sara Alert™ Import Format Description

The Sara Alert™ import template populates all enrollment data elements in either workflow. The most current import template and formatting guidance is available in the user interface under the “Import” button. Refer to the “Guidance” and “Value Sets” tabs for further detail on requirements for import.

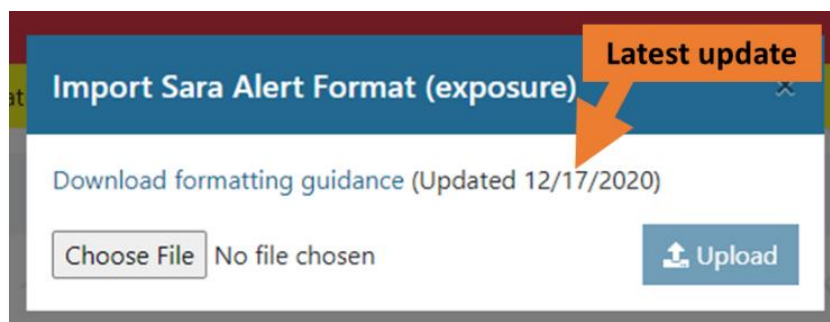
Add monitoree data that will be imported into the “Template” tab. The “Template” tab must be the first tab listed for the import to be successful. The system will ignore the “Guidance,” “Value Sets,” “Example,” and “Updates” tabs.

	A	B	C	D	E	F	G	H	I	J	K	L	M
	First Name	Middle Name	Last Name	Date of Birth	Sex at Birth	White	Black or African American	American Indian or Alaska Native	Asian	Native Hawaiian or Other Pacific Islander	Ethnicity	Primary Language	Secondary Language
1													
2													
3													

Navigation tabs: Template, Guidance, Value Sets, Example, Updates

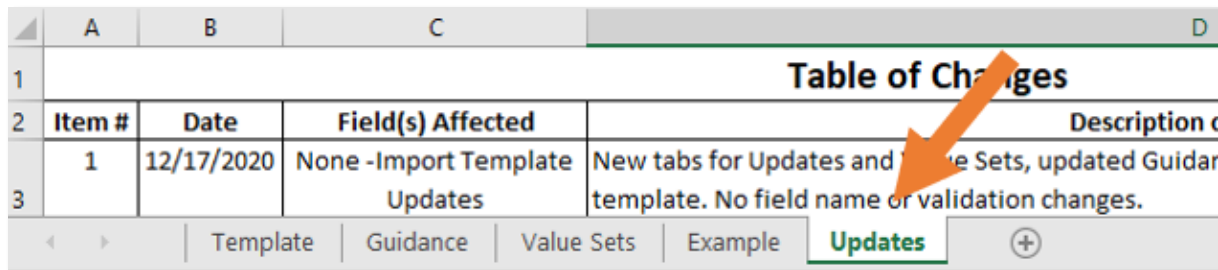
**Figure 32: The “Template” tab must be listed first for the import to be successful. The system will ignore all other tabs.**

**NOTE:** The most current import template must be used to import and ensure all data elements are populated successfully. A user may only import records into assigned jurisdictions that the user has permission to do so. For more information on when monitorees will receive a message from the system after import, see **page 164**.



**Figure 33: The Sara Alert Format import window notes when the template was last updated**

Updates to the import template are noted in the “**Updates**” tab of the document, and the latest date changes were made is noted on the import pop-up window.



The screenshot shows a spreadsheet with a tab labeled 'Updates' selected. An orange arrow points to the 'Table of Changes' section. The table has four columns: Item #, Date, Field(s) Affected, and Description of Change. Row 1 shows an update to the 'None -Import Template' field, noting that new tabs for Updates and Value Sets were added, and the Guidar template was updated. Row 2 shows an update to the 'Updates' field, noting that no field name or validation changes were made.

Item #	Date	Field(s) Affected	Description of Change
1	12/17/2020	None -Import Template	New tabs for Updates and Value Sets, updated Guidar template. No field name or validation changes.
2		Updates	

Figure 34: The “Updates” tab notes any changes to the import template

### 9.2.3.1 Requirements for Symptom Onset Date and Last Date of Exposure

The Sara Alert import template is designed to allow a user to use the same template for importing records into either the exposure or isolation workflow. The workflow that a user chooses to import records into (e.g., exposure, isolation) impacts which fields are required or supported on import. The **fields that differ by workflow** are listed below (and shaded in yellow in the import template):

- **Exposure Workflow**
  - **Required:** Last Date of Exposure **or** Continuous Exposure set to “True” – used to define monitoring period
  - **Not Required:**
    - Symptom Onset Date – this field will be ignored on import and the Symptom Onset Date field will be blank after the record is created. See page 39 for more information about how Symptom Onset Date is used in the Exposure Workflow.
    - Case Status – this field will be ignored on import and the Case Status field will be blank after the record is created. See page 28 for more information on how Case Status is used in the Exposure Workflow.
- **Isolation Workflow**
  - **Required:**
    - Symptom Onset Date AND/OR a Positive Lab Result (Lab 1 Specimen Collection Date, Lab 1 Result) – may be used by the system to determine eligibility for a record to appear on the Records Requiring Review line list.
  - **Not Required:**
    - Last Date of Exposure – this field will be populated if any data is provided.
    - Continuous Exposure – this field will be ignored on import.
    - Case Status – this field is used by the system to move monitorees between workflows. Records in the Isolation workflow are strongly recommended to have a case status of either “Confirmed” or “Probable”.

Fields not listed above are fully supported when importing records into either workflow.

Exposure Notes	Status	Symptom Onset Date	Case Status
		Date (YYYY-MM-DD)	Confirmed Probable Suspect Unknown Not a
		WORKFLOW SPECIFIC NOTES:	WORKFLOW SPECIFIC NOTES:
		EXPOSURE: This field is ignored on import into	EXPOSURE: This field is ignored on import into

**Figure 35: Follow workflow specific notes for italicized and shaded yellow fields**

### 9.2.3.2 Optional Import Fields Constrained in the User Interface

Fields that are italicized and shaded blue in the import template are not currently validated on import but are constrained in the User Interface (UI) to a defined value set. The “Value Sets” tab shows the options available in the UI and are strongly recommended for user on import. If other values are entered, unexpected behavior may occur.

B	C	D	E	F	G	H	I	J	K	L	M	N
Additional Planned Travel Destination Country	Additional Planned Travel Port of Departure											

**Figure 36: Use the recommended value sets for italicized and shaded blue fields to avoid unexpected behavior in the system**

### 9.2.3.3 Format for Dates and Phone Numbers

Sara Alert™ accepts a different slightly format for dates and phone numbers when someone is enrolled via import versus the Enrollment wizard. The purpose of this is to optimize usability of the user interface while minimizing import errors that may occur (e.g., month and day reversal) whenever the date format differs between systems. Note the differences in format below. Using the enrollment wizard format during import may cause import errors.

**Table 5: Data formats for Dates and Phone Numbers**

Data Type	Import Format	Enrollment Wizard Format
Date	YYYY/MM/DD	MM/DD/YYYY
Phone Number	+1#####	#####

### 9.2.4 How to Import Multiple Records

1) Prepare a file for import according to the appropriate template guidelines; if you have any questions about the requirements, email [sarasupport@aimsplatform.com](mailto:sarasupport@aimsplatform.com).

First Name	Middle Name	Last Name	Date of Birth	Sex at Birth	White	Black or African American	American Indian or Alaska Native	Asian	Native Hawaiian or Other Pacific Islander	Ethnicity	Primary Language	Secondary Language	Interpretation Required?
Import	Kassulke03	Rearrange	1957-11-10	Female	true	true	true	true	true	Hispanic or Latino	Spanish		true

**Figure 37: The Sara Alert import format**

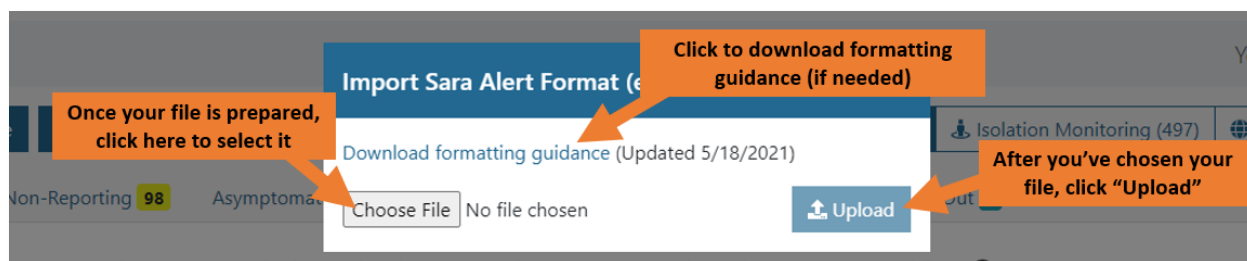


2) Select the monitoring workflow that you wish to import the records into. You can import contacts into **Exposure Monitoring** from the Exposure dashboard, or cases from the **Isolation Monitoring** from the Isolation dashboard. Importing is not supported from the Global dashboard view. Click the “**Import**” button on the top of the dashboard. Select either “Epi-X” or “Sara Alert Format” depending on the file type you are importing.



**Figure 38: Click the Import Button and choose your file type**

2) Click “**Choose File**” to select a file to upload. The “Sara Alert Format” option provides the latest formatting guidance. Select “**Upload**.”



**Figure 39: Select a File to Upload; Sara Alert Format shown**

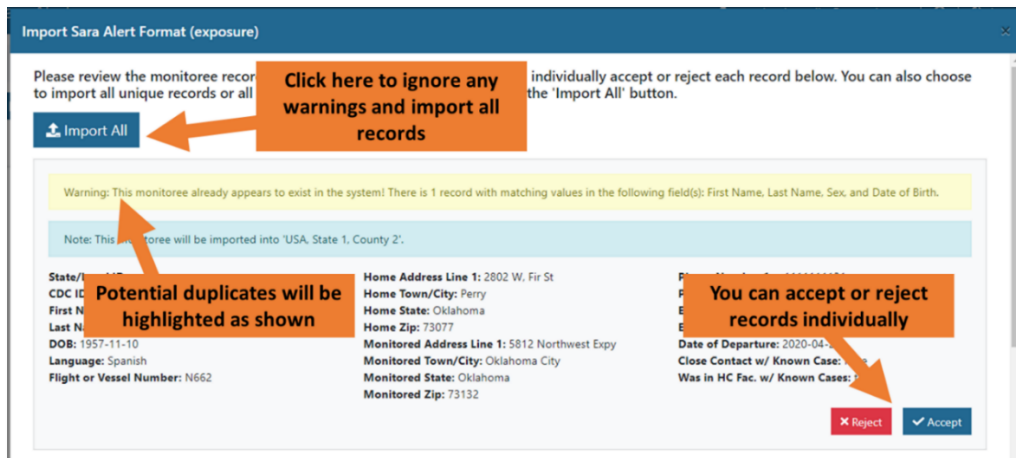
3) Review the records before importing them. The system compares the import file against existing records in the system within the importing user’s jurisdiction to identify potential duplicates based on exact match of First Name, Last Name, Sex at Birth (if not blank), and Date of Birth (if not blank) **OR** an exact match of the State/Local ID. Null or blank fields are handled as follows:

- If a monitoree is imported or enrolled without a DOB and/or Sex at Birth, Sara Alert will now flag existing monitorees with the same First Name and Last Name (and DOB or Sex, as available) as potential duplicates. Sara Alert will continue to flag State/Local ID matches for the monitoree.
- A record will not be flagged as a potential duplicate if there is an exact match on First Name and Last Name, but different inputted values in the Sex at Birth or DOB fields.
- If a monitoree is imported without a First Name or Last Name, Sara Alert will only look at their State/Local ID when checking for potential duplicates.

The system will inform the user which match criteria was met to identify the potential duplicate. The system does not check for duplicates within the import file. The user can choose to:

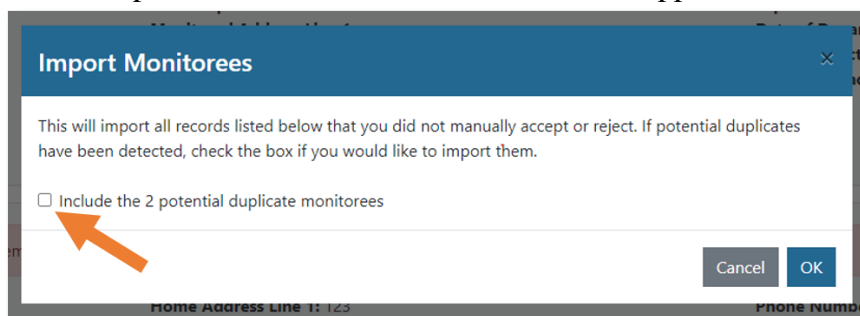


Review individual records and select “Accept” or “Reject” for each record. Select “Import All” to accept all remaining records.



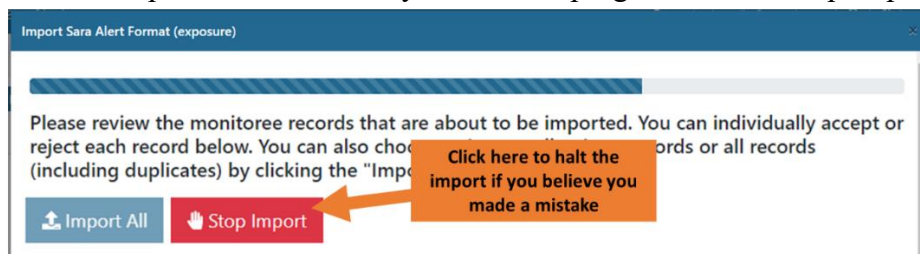
**Figure 40: Sara Alert™ import screen (Note how duplicate records are marked)**

5) If you choose to select “Import All” to accept remaining records that were not individually accepted or rejected, by default, only unique records will be accepted unless the user chooses to include detected duplicate monitorees. To include potential duplicates, check the box and click “OK.” If no potential duplicates are found, a check box will not appear.



**Figure 41: Selecting “Accept All” gives the option to include remaining duplicates**

6) Large files may take several minutes to import. A bar at the top indicates progress of record creation from the import file. The “Stop Import” button halts additional record creation. However, this function does not delete records that have already been added during import session. For smaller import files, a user may not see the progress bar or “Stop Import” button.



**Figure 42: Click “Stop Import” to end the import**

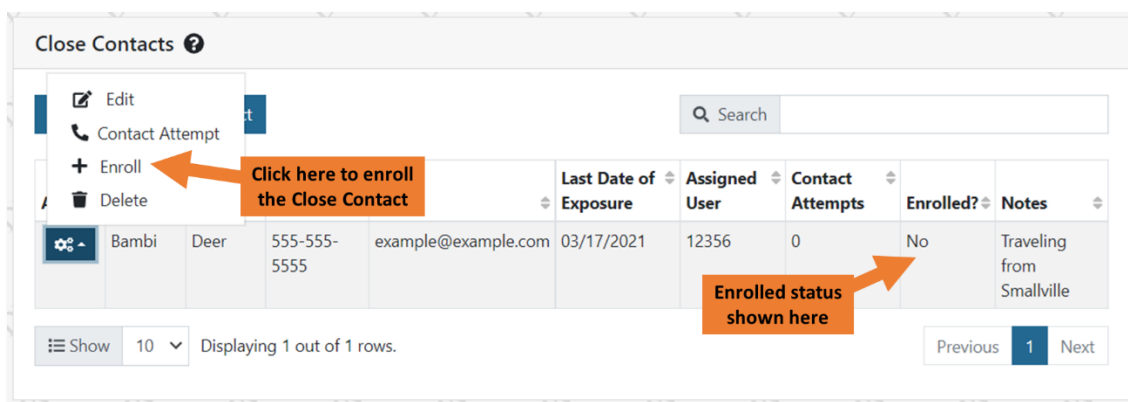
**NOTE:** The upper limit allowed for each import file is 1000 records. If a user would like to import more than 1000 records, it is recommended that multiple import sessions are completed. Users may also consider use of the API for large imports.

### 9.3 How to Complete Enrollment of Close Contacts Saved in a Record as New Monitorees in the System

For monitorees who were exposed and later become a case, users may wish to add to Sara Alert the individuals listed in the Close Contacts table of that monitoree's record. The following user roles can enroll monitorees from a record's Close Contacts list:

- Public Health Enroller
- Contact Tracer
- Super User

1) Open the monitoree's record and scroll to the "Close Contacts" section. The "Enrolled?" column shows whether a Close Contact has been enrolled in Sara Alert™. Find the Close Contact you would like to enroll, click their actions button, then click "Enroll" to begin enrolling them in Sara Alert.



**Figure 43: Click "Enroll" to add a specific contact as a new monitoree**

2) This will automatically open the enrollment wizard so you can enroll the contact as a new monitoree. The following fields will pre-populate with data available in the close contact record:

- **Monitoree Identification:** First Name and Last Name
- **Monitoree Contact Information:** Phone Number and Email Address
- **Monitoree Potential Exposure Information:** Last Date of Exposure, Assigned User, Notes, Close Contact of Known Case (set to the index monitoree's Sara Alert ID)

**Figure 44: The enrollment wizard will pre-populate with information from the close contacts list**

3) Complete enrollment to begin monitoring in Sara Alert. See **page 50** for more information on enrollment.

# 10 HOW TO MANAGE MONITOREES IN SARA ALERT

The following section contains information on how to manage monitorees in Sara Alert. This includes information about how to:

- View and edit records
- Perform basic dashboard functions
- Perform dashboard functions specific to Exposure Monitorees
- Perform dashboard functions specific to Isolation Monitorees
- Manage individual monitoree records

The primary audience for this section is **Public Health Users, Public Health Enrollers, Contact Tracers, and Super Users**. Enrollers have limited capabilities to manage monitorees in Sara Alert.

**Table 6: Monitoree Management Capabilities by Role**

Capabilities	Enroller	Public Health	Public Health Enroller	Contact Tracer	Analyst	Administrator	Super User	Page #
<i>View Records</i>	✓	✓	✓	✓			✓	60
<i>Edit Monitoree Details</i>	✓	✓	✓	✓			✓	61
<i>View the Monitoring Dashboard</i>		✓	✓	✓			✓	61
<i>Toggle Between Workflows</i>		✓	✓	✓			✓	62
<i>Navigate Line Lists</i>		✓	✓	✓			✓	62
<i>Monitoree Search</i>	pg 73*	✓	✓	✓			✓	63
<i>Identify Heads of Households</i>		✓	✓	✓			✓	75
<i>Move Monitorees between Exposure Line Lists</i>		✓	✓	✓			✓	85
<i>Move Monitorees Between Isolation Line Lists</i>		✓	✓	✓			✓	90
<i>Apply and Save Advanced Filters</i>		✓	✓	✓			✓	66
<i>Transfer a Record</i>		✓	✓				✓	92
<i>Log a Manual Contact Attempt</i>		✓	✓	✓			✓	96
<i>Add a Report</i>		✓	✓	✓			✓	97
<i>Modify an Existing Report</i>		✓	✓	✓			✓	98
<i>Add a Note to a Report</i>		✓	✓	✓			✓	100
<i>Add Lab Results</i>		✓	✓	✓			✓	101
<i>Add Vaccinations</i>		✓	✓	✓			✓	103
<i>Add a Close Contact</i>		✓	✓	✓			✓	103
<i>Add a Comment to a Record</i>		✓	✓	✓			✓	106
<i>Filter Record History</i>		✓	✓	✓			✓	108
<i>Change Case Status</i>		✓	✓	✓			✓	112
<i>Flag a Record for Follow-Up</i>		✓	✓	✓			✓	77
<i>Close Records</i>		✓	✓	✓			✓	113

\* Enrollers have different search capabilities from the other user types. See **page 73** for more details.

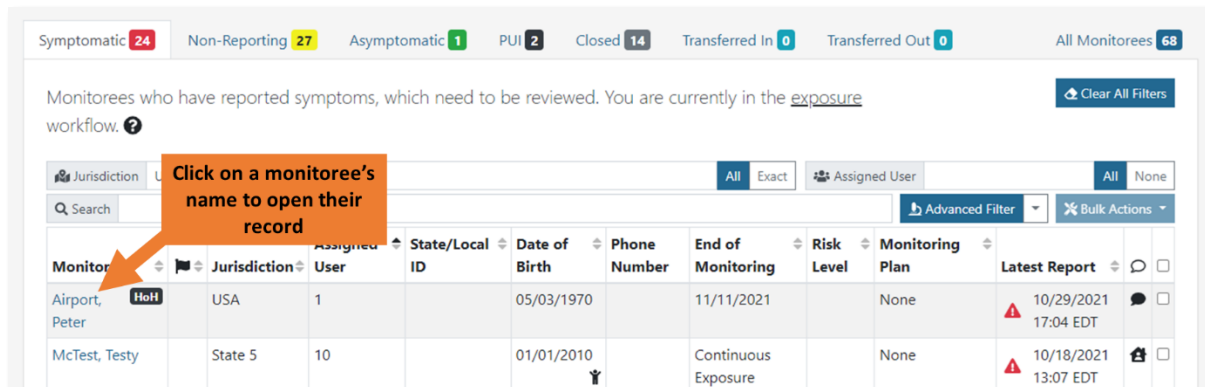
## 10.1 Viewing and Editing Records

The following sections describe basic record viewing and editing functions that an **Enroller**, **Public Health** user, **Public Health Enroller**, **Contact Tracer**, and **Super User** can perform.

### 10.1.1 How to Open and View a Monitoree's Record

1) Open the monitoree's record by clicking on their name. View the record details.

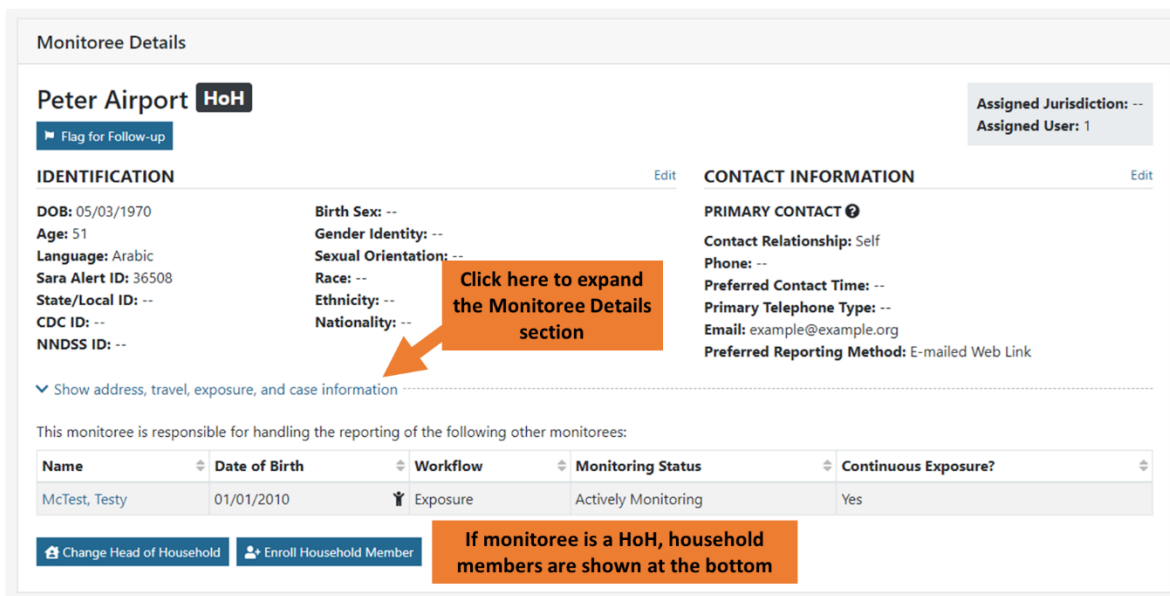
**NOTE:** While **Enroller** users have a different view from what is shown below, they also open records by clicking on the monitoree's name.



Symptomatic 24 Non-Reporting 27 Asymptomatic 1 PUI 2 Closed 14 Transferred In 0 Transferred Out 0 All Monitorees 68									
Monitorees who have reported symptoms, which need to be reviewed. You are currently in the <u>exposure</u> workflow. ?									
Jurisdiction: L All Exact Assigned User: All None									
Search: Advanced Filter Bulk Actions									
Monitor	Jurisdiction	User	State/Local ID	Date of Birth	Phone Number	End of Monitoring	Risk Level	Monitoring Plan	Latest Report
Airport, Peter	USA	1		05/03/1970		11/11/2021		None	10/29/2021 17:04 EDT
McTest, Testy	State 5	10		01/01/2010		Continuous Exposure		None	10/18/2021 13:07 EDT

Figure 45: Click the monitoree's name to open their record

2) For **Public Health** users, **Public Health Enrollers**, **Contact Tracers**, and **Super Users**, the “**Monitoree Details**” section defaults to a collapsed view. Click “Show address, travel, exposure, and case information” to view the full record. If the monitoree is a Head of Household, their household members will appear at the bottom of this section.



Monitoree Details

Peter Airport
HoH

Flag for Follow-up

Assigned Jurisdiction: --  
Assigned User: 1

IDENTIFICATION
Edit

CONTACT INFORMATION
Edit

DOB: 05/03/1970  
Age: 51  
Language: Arabic  
Sara Alert ID: 36508  
State/Local ID: --  
CDC ID: --  
NNDSS ID: --

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

PRIMARY CONTACT ⓘ  
Contact Relationship: Self  
Phone: --  
Preferred Contact Time: --  
Primary Telephone Type: --  
Email: example@example.org  
Preferred Reporting Method: E-mailed Web Link

Show address, travel, exposure, and case information

This monitoree is responsible for handling the reporting of the following other monitorees:

Name	Date of Birth	Workflow	Monitoring Status	Continuous Exposure?
McTest, Testy	01/01/2010	Exposure	Actively Monitoring	Yes

Change Head of Household
Enroll Household Member

If monitoree is a HoH, household members are shown at the bottom

Figure 46: Monitoree Details shows household members and defaults to a collapsed view

**NOTE:** Navigating to a monitoree's record may clear some search fields (see page 63).

## 10.1.2 How to Edit Monitoree Enrollment Information

1) Find and open the monitoree record by clicking on their name in the “**Monitoree**” column.

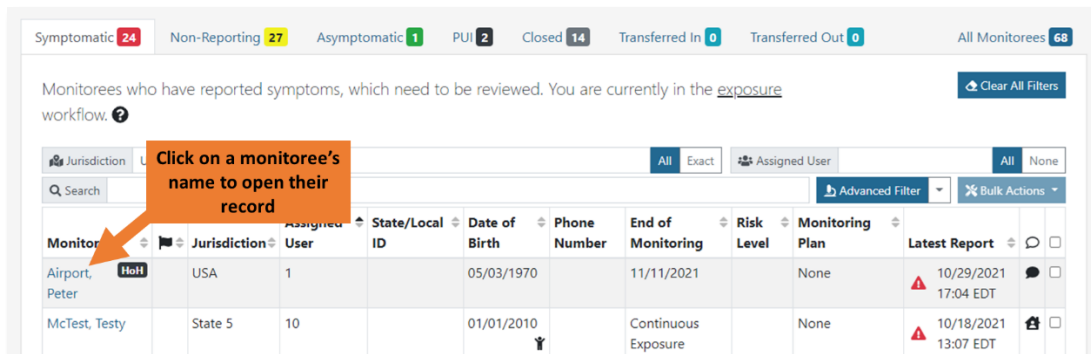


Figure 47: Select monitoree record

2) Click “Edit” on the corresponding Monitoree Details section. You may need to first show address, travel, exposure, and case information to reveal their “Edit” buttons.

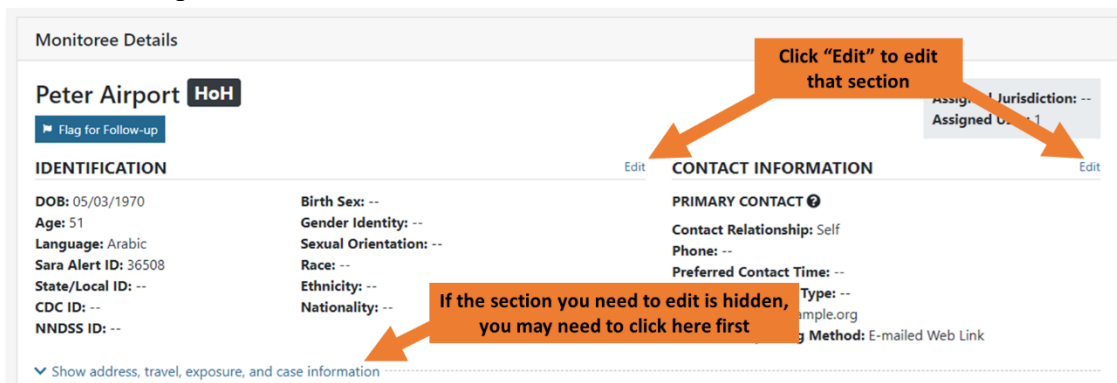


Figure 48: Modify monitoree record

## 10.2 Basic Dashboard Functions

The following sections describe information and features that a **Public Health, Public Health Enroller, Contact Tracer, and Super User** can access from any dashboard (exposure, isolation, or global). While this section shows images of the Exposure Workflow Dashboard, the same instructions apply to the Isolation Workflow Dashboard and Global Dashboard.

### 10.2.1 How to Navigate to the Monitoring Dashboards View

If you have access to multiple views, click “Monitoring Dashboards” at the top of your screen to navigate to the Monitoring Dashboards.

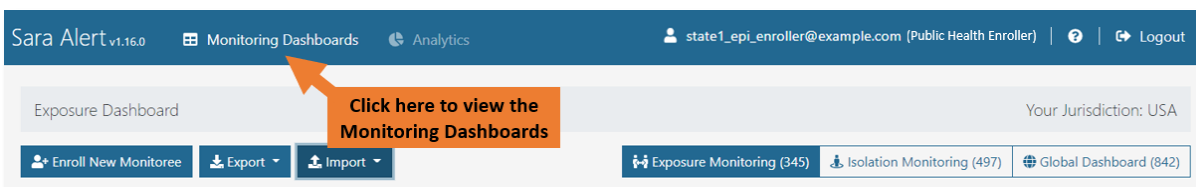


Figure 49: Click “Monitoring Dashboards” to navigate to the Monitoring Dashboards view.

## 10.2.2 How to Toggle Between Dashboards

Public Health, Public Health Enrollers, Contact Tracers, and Super Users have access to the Exposure, Isolation, and Global Dashboards.

- **Exposure Workflow:** Used to monitor a potentially exposed individual for symptoms during a specified period of time (e.g., 10 days) to determine if the person becomes ill.
- **Isolation Workflow:** Used to monitor a case to determine whenever it is safe to discontinue isolation.
- **Global Dashboard:** Shows all monitorees in the user's jurisdiction, across both the Exposure and Isolation Workflows.

1) Toggle between the workflow dashboard views by clicking “**Exposure Monitoring**,” “**Isolation Monitoring**,” or “**Global Dashboard**” on the upper right of the dashboard.

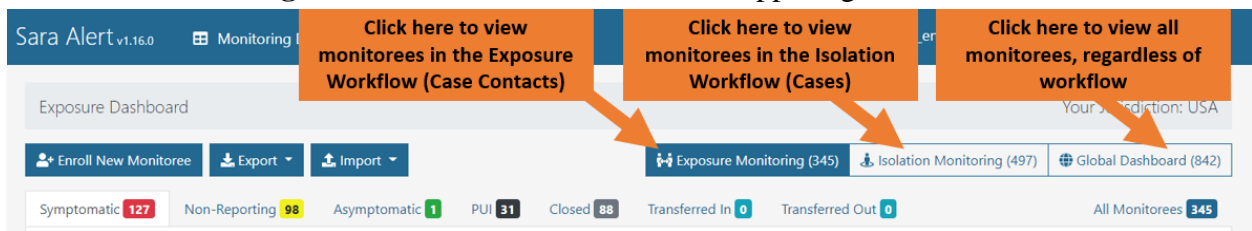


Figure 50: Toggle between the exposure and isolation monitoring dashboard views

2) The view will update. The button for the current workflow is colored blue and the dashboard titles are updated.

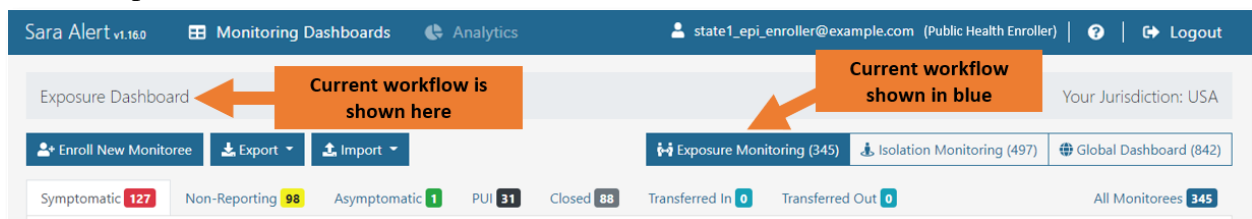


Figure 51: The current view is highlighted in two places

## 10.2.3 How to Navigate Monitoring Dashboard Line Lists

A video tutorial for navigating the line lists in the exposure workflow is available at: <https://saraalert.org/public-health/training/>. Navigation between the line lists works the same in the exposure and isolation workflows (though the line list names are different).

1) Click a tab to view monitorees on that line list. To view all records in the exposure workflow, select the “All Monitoree” line list or the “All Cases” line list in the isolation workflow.

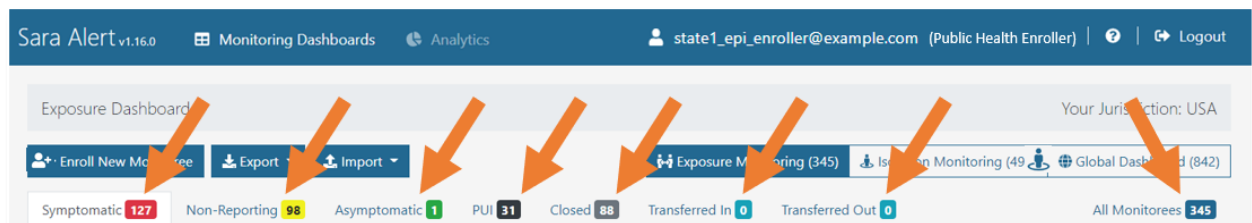


Figure 52: Click through the tabs to view the monitoree line lists



## 2) Sort columns by clicking on the arrow icons.

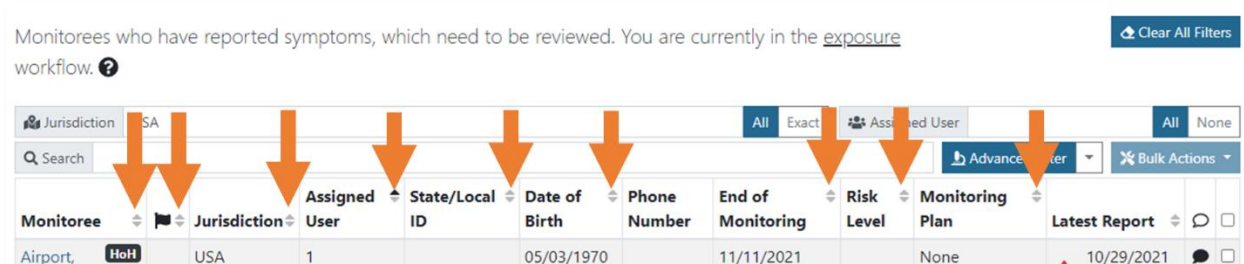


Figure 53: Sort monitoree records by one or more columns

### 10.2.4 How to Search for One or More Monitoree Records

**Public Health users, Public Health Enrollers, Contact Tracers, and Super Users** can use three different types of searches to find monitorees of interest on a Sara Alert line list:

1. **Basic Search (page 64)**
2. **Dashboard Quick Filters:** Users can filter records from the dashboard by Jurisdiction or Assigned user (without using Advanced Search) (**page 65**)
3. **Advanced Filters:** Allows users to search across multiple fields and to construct more complex search queries using the “Advanced Filter” feature (**page 66**)

**Enrollers** only have access to the **Basic Search** and **Dashboard Quick Filter** features.

Users can use these search features independently or in combination with each other (e.g., by setting up an advanced filter AND filtering by Assigned User on the dashboard). 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. The numbers on the line list tabs **will not** dynamically change based on search (see **Figure 70 on page 70**).

To see all applied filters, users should check the following: Jurisdiction and Assigned User Quick Filters to see which criteria are applied (selected filter option and specified values), Search Bar for search terms, and name of current Advanced filter applied.

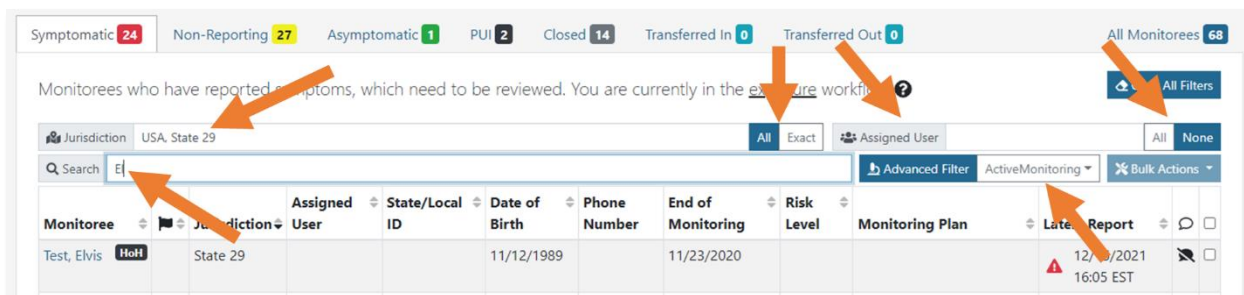


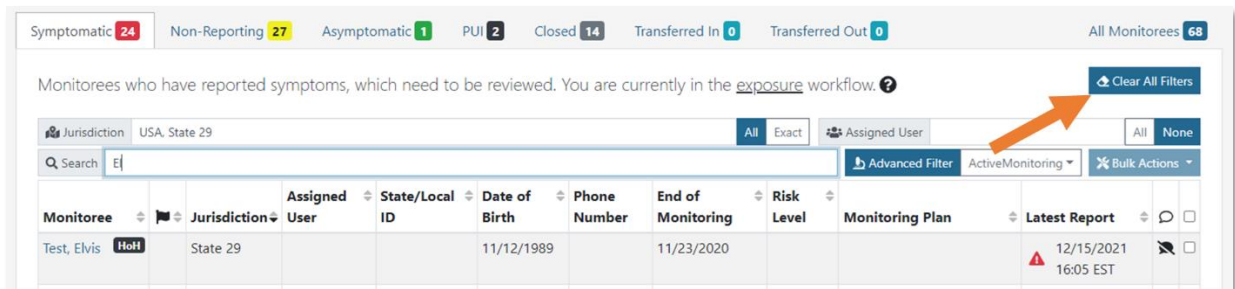
Figure 54: Check all filters to see what is currently active

Search terms and filters are “sticky” in most situations. This means that if a user has added search terms or filters, then navigates to a different view, the search terms and filters will remain active. For example, if a user:

1. Applied a search term and/or filter to the monitoring dashboard to view the desired subset of monitorees.
2. Then, performed one of the following actions:
  - Navigate to a monitoree’s record and later click “Return to Dashboard;” or
  - Perform a Bulk Action to edit monitorees in the current view; or
  - Refresh the page; or
  - Enroll a new monitoree/case and later click “Return to Dashboard;” or
  - Navigate from the Exposure workflow to the Analytics or Admin dashboard, then return to the Monitoring Dashboard; or
  - Change line lists in the same workflow; or
  - Navigate to the other workflow.
3. The original search term and/or filter applied in step 1 will usually remain active.

See **Appendix C: “Stickiness” of Monitoring Dashboard Filters, Searches, and Settings** for a complete list of filters/searches/settings that are “sticky” after specific actions are performed.

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 55: Click “Clear All Filters” to remove all filters**

#### 10.2.4.1 Basic Search

**NOTE:** While this section shows images of the Exposure Dashboard, the same instructions apply to the Isolation Dashboard.

Users can use the “Search” bar on the dashboard to find records that match search terms in any of the following fields:

- 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



Basic search terms are remembered by the system when you change line lists and when you view a record then return to the dashboard. Basic search terms will be applied until cleared by a user.

1) To limit the search for a record within a specific line list, click on the appropriate line list name and enter the search criteria in the search box.

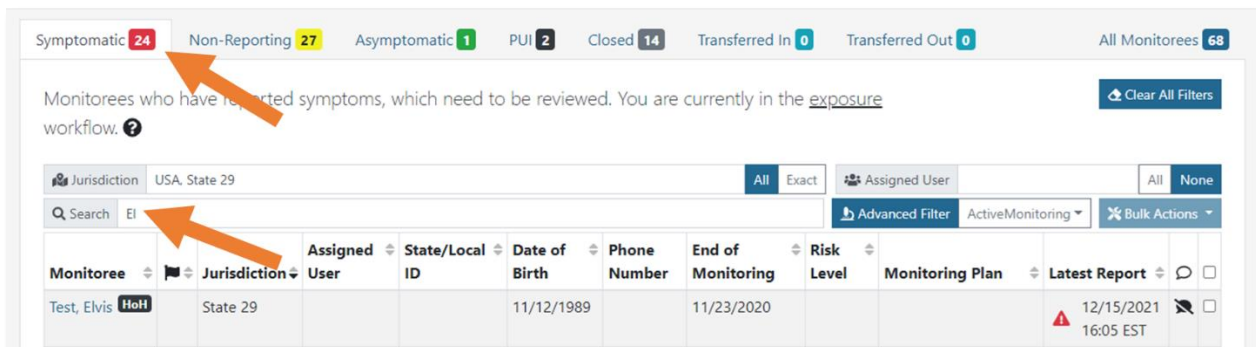


Figure 56: Search for a record within a specific line list by selecting that line list

2) To search across all records in the exposure workflow, click “All Monitorees” and then enter the search criteria in the search box.

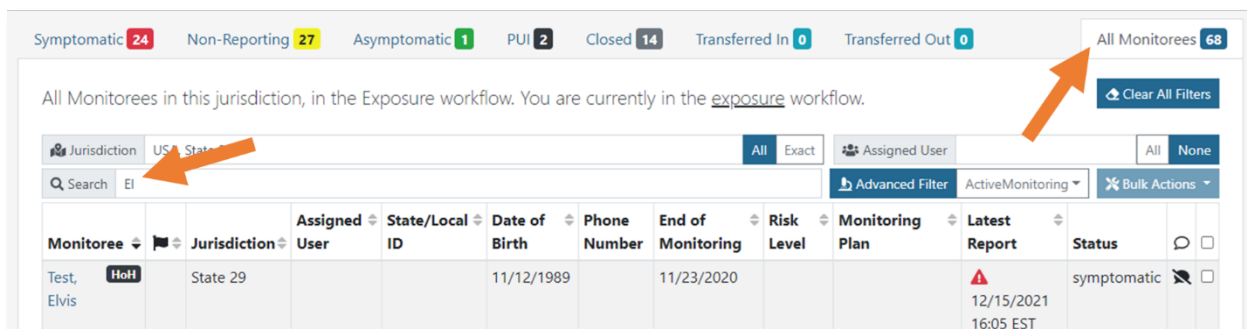


Figure 57: Search among all tabs by selecting the “All Monitorees” tab

#### 10.2.4.2 Filter by Assigned User or Jurisdiction (Dashboard Quick Filters)

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

**NOTE:** These filters are remembered by the system when you change line lists but are not remembered if you view a monitoree’s record and then return to the dashboard. If you would like to maintain these filters on the dashboard while working through monitoree record updates, you should open a new internet browser tab to view and update monitoree record details.

**Tip:** To open a monitoree record in a new internet browser tab to maintain your dashboard view, right-click on the monitoree name from the dashboard and select “Open link in new tab.”

#### 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

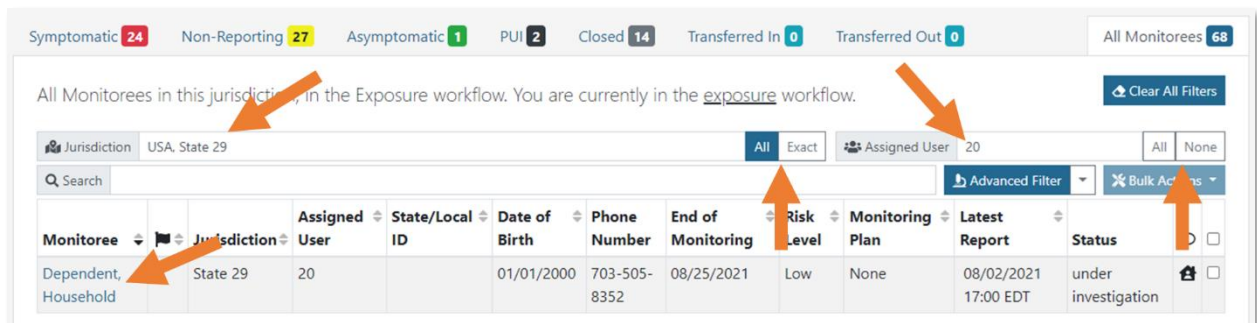


Figure 58: Search and/or sort by jurisdiction and user assignment

### 10.2.4.3 Advanced Filter

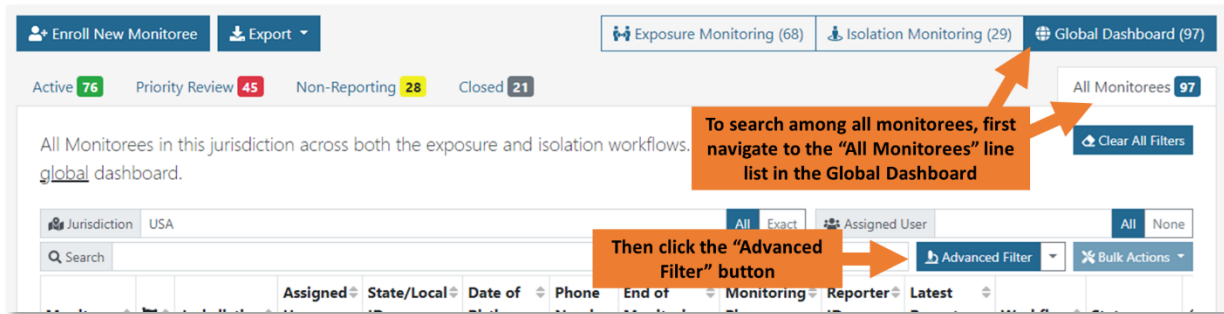
Sara Alert supports an Advanced Filter capability, which allows users to search across multiple fields and to construct more complex search criteria using the “Advanced Filter” feature. A user may set criteria for up to 5 fields for each filter.

When using the Advanced Filter feature, keep in mind these **helpful hints**:

- All filters are applied to the **current workflow**. You may navigate between line lists within a workflow to view records that meet the specified criteria on each.
  - Navigate to the **All Monitorees** line list (Exposure Workflow) or the **All Cases** line list (Isolation Workflow) to view all monitorees in each workflow that meet specified criteria.
  - **Saved**, applied filters will continue to be applied when toggling between workflows. See **page 71** for directions on how to save filters.
- Advanced Filters are applied in addition to Basic Search terms and Quick Filters (**Assigned User, Jurisdiction**). See **page 64** for more information on the Basic Search
- For example, if a user has filtered by an assigned user and applied an advanced filter, the user will only see records that meet all criteria. See Appendix A (**page A-1**) for a full list and description of all advanced filter fields, along with accepted values.

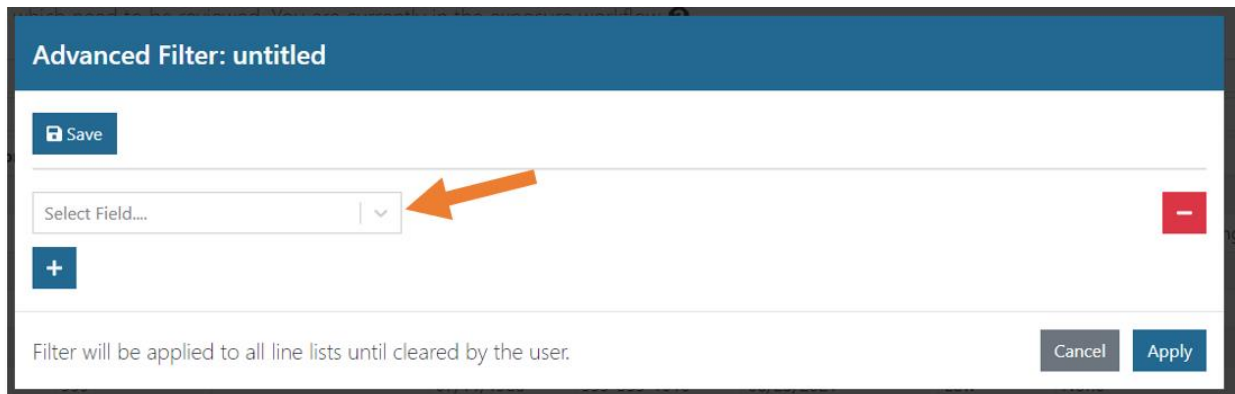
### 10.2.4.3.1 Create a New Filter

1) Click the “**Advanced Filter**” button. If you want to search across all line lists in the workflow, first navigate to the “All Monitorees” or “All Cases” tab.



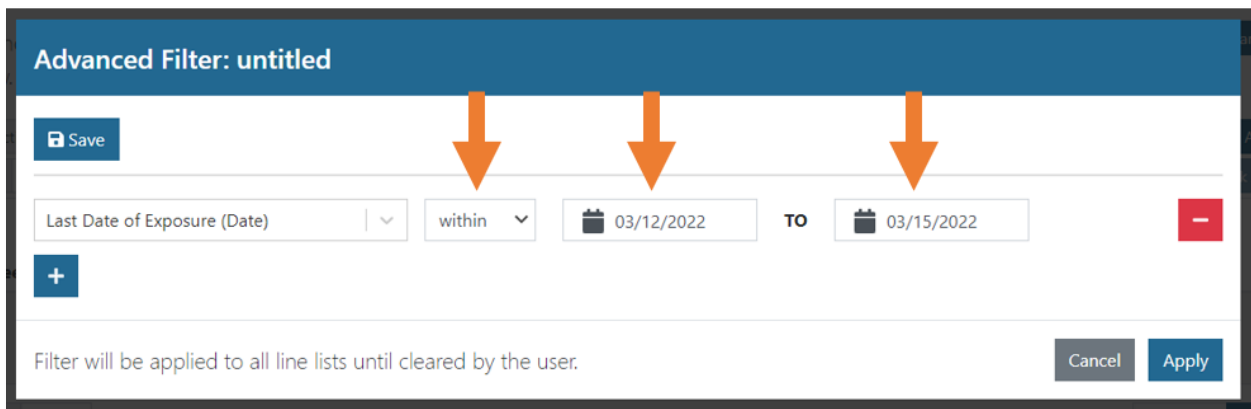
**Figure 59: Click the “Advanced Filter” button**

2) This will open the Advanced Filter window. Choose the field(s) you want to filter by from the “**Select**” drop-down menu. See **Appendix A** for a full list and description of all fields that can be selected.



**Figure 60: Select the filter field from the drop-down.**

3) Adjust the variables to match your desired criteria.



**Figure 61: Adjust the parameters as appropriate**

4) For multi-select filter types (e.g. Assigned User) multiple search values can be selected from the drop-down. Records containing any of the selected values will be shown.

The screenshot shows the 'Advanced Filter: untitled' window. At the top left is a 'Save' button. Below it, the filter type is 'Assigned User (Multi-select)'. To the right of this, three selected values are shown in a row: '5', '30', and '34', each with a small 'x' icon to its right. Further right is a red minus icon and a help icon. Below the filter type, there is a blue plus icon. At the bottom, a message states 'Filter will be applied to all line lists until cleared by the user.' and there are 'Cancel' and 'Apply' buttons.

**Figure 62: Multiple values can be selected using a “Multi-select” filter**

5) For combination filter types (e.g., Lab Result), additional filter sub-parameters can be added by clicking the gray, circular “+” button on the right side of the window.

The screenshot shows the 'Advanced Filter: untitled' window. The filter type is 'Lab Result (Combination)'. To the right, two sub-parameters are shown: 'result' and 'positive', each with a dropdown arrow. To the right of these is a gray circular button with a plus sign. Further right is a red minus icon and a help icon. Below the filter type, there is a blue plus icon. At the bottom, a message states 'Filter will be applied to all line lists until cleared by the user.' and there are 'Cancel' and 'Apply' buttons.

**Figure 63: For Combination filter types, add additional sub-parameters with the gray “+” button**

For combination filter types, each sub-parameter is linked by an “AND” statement. Only records that have a data element that meets ALL user-specified criteria will be displayed. For example, the filter shown below would only return records that have at least one positive PCR lab result.

The screenshot shows the 'Advanced Filter: untitled' window. The first filter is 'Lab Result (Combination)' with sub-parameters 'result' and 'positive'. Below this, the word 'AND' is displayed, followed by a second filter with sub-parameters 'test type' and 'PCR'. A gray circular button with a plus sign is to the right of the second filter. Further right is a red minus icon and a help icon. Below the filter type, there is a blue plus icon. At the bottom, a message states 'Filter will be applied to all line lists until cleared by the user.' and there are 'Cancel' and 'Apply' buttons.

**Figure 64: Additional Combination criteria are linked by an “AND” statement**

6) Users can add additional filter parameters by clicking the blue “+” button on the left side of the window.

**Figure 65: For all filter types, add additional parameters with the blue “+” button**

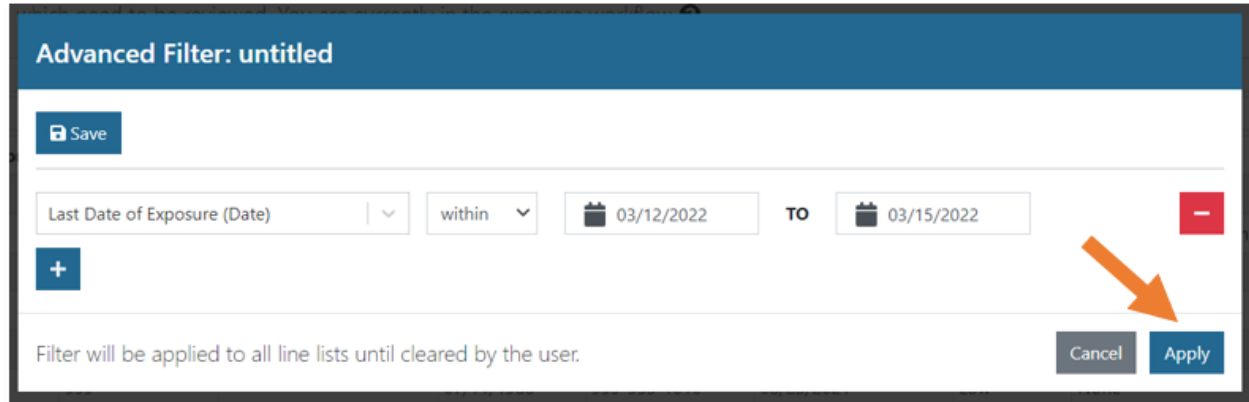
7) Only records that meet ALL of the criteria included in the Advanced Filter (i.e., each parameter is linked by an “AND” statement) will be displayed. For example, the filter below would only show records with a Last Date of Exposure between 3/28/21 and 3/31/21 who had also reported in the last 24 hours.

**Figure 66: Additional criteria are linked by an “AND” statement**

8) Click the “–” button on the right side of the window to remove a parameter from the filter.

**Figure 67: Remove individual parameters with the “–” button**

9) Click **“Apply”** to apply the filter to the dashboard.



**Figure 68: Click “Apply” to apply the filter**

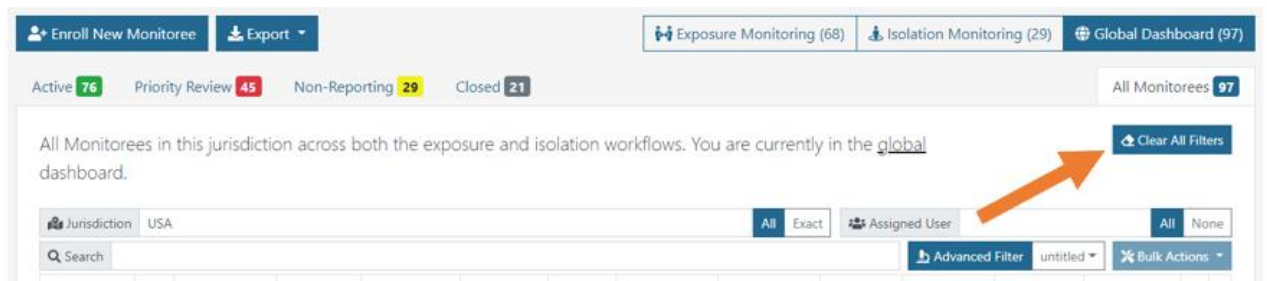
Only monitorees that meet the specified parameters will be shown. The number of monitorees in the current line list that meet the parameters is indicated at the bottom of the dashboard view; the numbers on the line list tabs will still show the total (unfiltered) numbers of monitorees on that line list.



Monitoree	Jurisdiction	Assigned User	State/Local ID	Date of Birth	Phone Number	End of Monitoring	Monitoring Plan	Reporter ID	Latest Report	Workflow	Status	
Picaso, Albert	State 10			04/01/1911	987-654-3214	Continuous Exposure	Daily active monitoring	6993	12/15/2021 16:03 EST	Exposure	symptomatic	
Williams, Kristen	State 1	1111		01/01/1900	999-999-9999	12/17/2021	None	36569	12/03/2021 11:12 EST	Isolation	symp non test based	

**Figure 69: The number of monitorees in the current line list meeting the search parameters**

10) To clear all filters and search criteria, click the **“Clear All Filters”** button from the dashboard

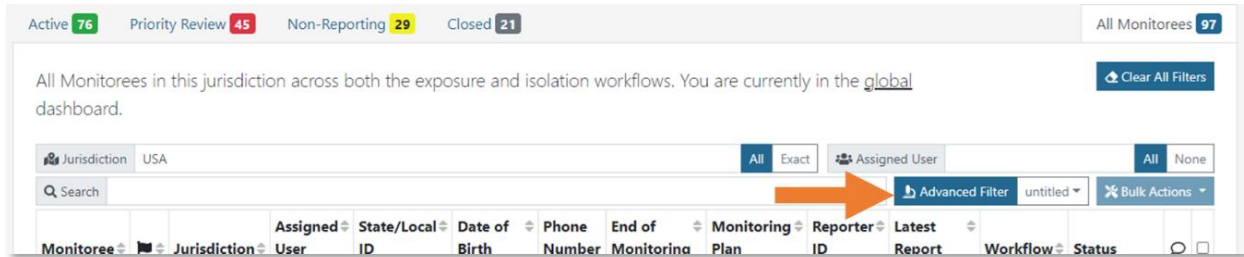


**Figure 70: The total number of monitorees that meet the filter parameters is shown at the bottom of the page. The “Clear All Filters” button will clear the filter**

### 10.2.4.3.2 Save the Current Filter

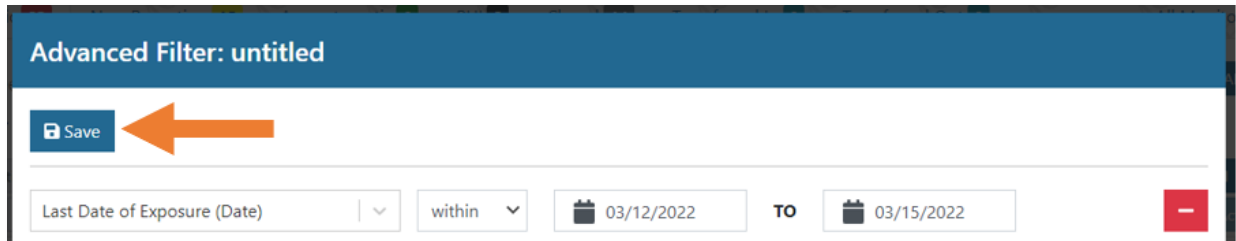
Users can save custom filters for future use. To save a filter:

- 1) Click the “**Advanced Filter**” button to show the current filter parameters.



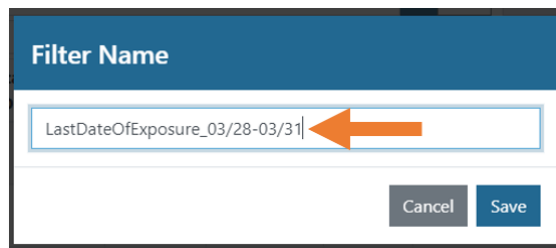
**Figure 71: Click “Advanced Filter” to open the filter window**

- 2) After setting the desired parameters, click “**Save**” to save the filter.



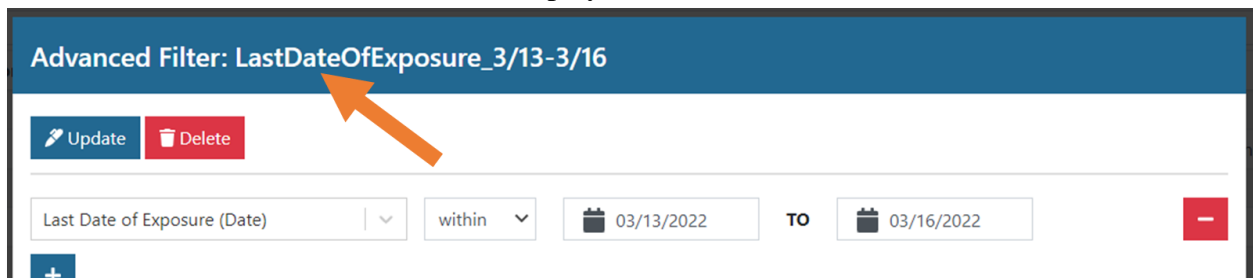
**Figure 72: Click “Save” to save the filter**

- 3) You will be prompted to name the filter. Enter a name and click “**Save**” to complete the process. **NOTE:** Filters cannot be renamed once saved.



**Figure 73: Name your filter**

- 4) Note where the current filter name is displayed in the Advanced Filter window.



**Figure 74: Note where the filter name is displayed**



### 10.2.4.3.3 Apply, Update, or Delete a Saved Filter

1) You can see all saved filters by opening the Advanced Filter drop-down menu from the dashboard. Click the filter name to open the filter.

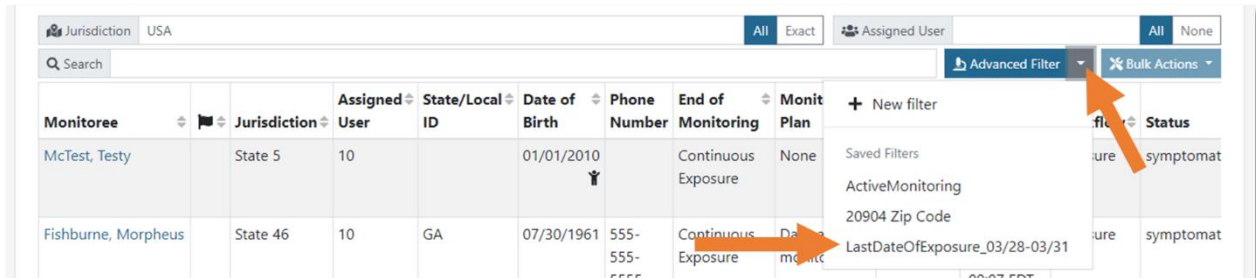


Figure 75: Open the Advanced Filter drop-down menu

2) Click “Apply” to apply the filter.

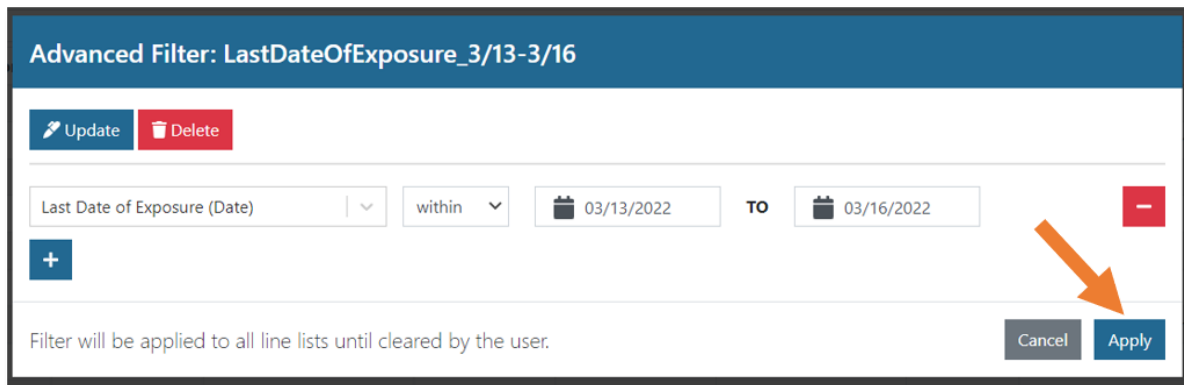


Figure 76: Apply the filter

3) The current advanced filter name is displayed on the dashboard. **An unsaved filter’s name will appear as “untitled.”**

**NOTE:** Advanced filters that have not been saved (appear as “untitled”) are remembered by the system when you change line lists but are not remembered if you view a monitoree’s record and then return to the dashboard. If you would like to maintain these filters on the dashboard while working through monitoree record updates, you should open a new internet browser tab to view and update monitoree record details.

**Tip:** To open a monitoree record in a new internet browser tab to maintain your dashboard view, right-click on the monitoree name from the dashboard and select “Open link in new tab.”

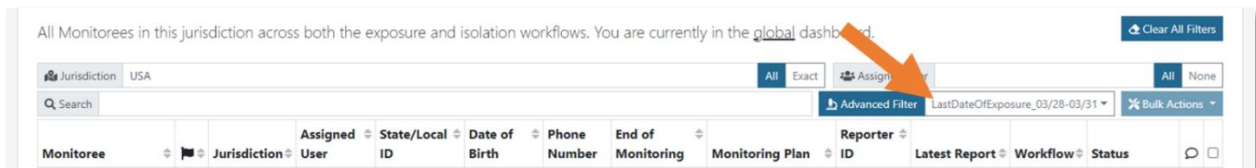
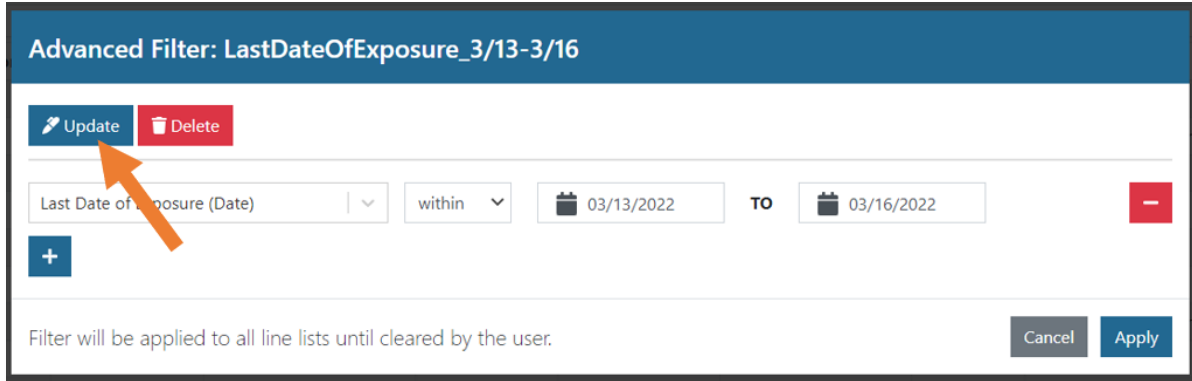


Figure 77: The filter name is visible in the dashboard



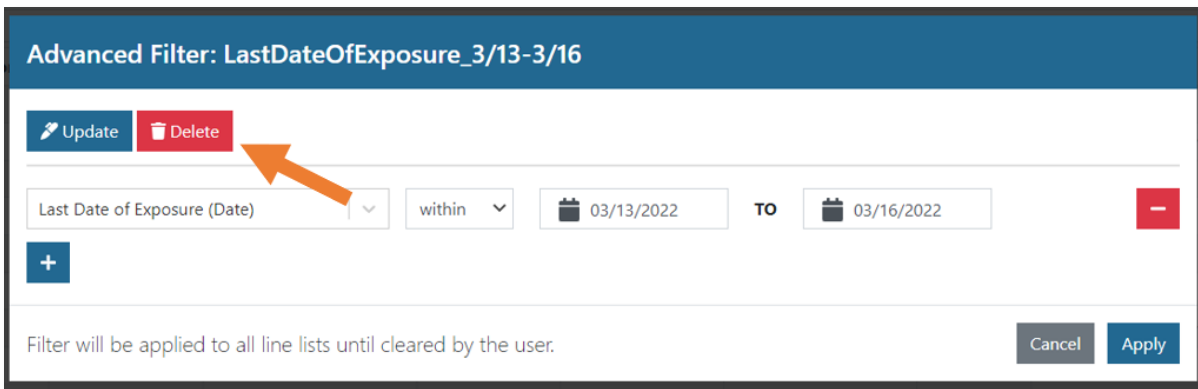
- 4) To update a saved filter, make the desired changes to the filter parameters and click “**Update**.”



The screenshot shows the 'Advanced Filter: LastDateOfExposure\_3/13-3/16' dialog box. At the top, there are two buttons: 'Update' (blue) and 'Delete' (red). An orange arrow points to the 'Update' button. Below the buttons, the filter criteria are displayed: 'Last Date of Exposure (Date)' with a dropdown arrow, 'within' with a dropdown arrow, a date range from '03/13/2022' to '03/16/2022', and a red minus button. At the bottom, there is a plus button and a note: 'Filter will be applied to all line lists until cleared by the user.' There are 'Cancel' and 'Apply' buttons at the bottom right.

**Figure 78: Update a saved filter**

- 5) Click “**Delete**” to delete a saved filter.



The screenshot shows the 'Advanced Filter: LastDateOfExposure\_3/13-3/16' dialog box. At the top, there are two buttons: 'Update' (blue) and 'Delete' (red). An orange arrow points to the 'Delete' button. Below the buttons, the filter criteria are displayed: 'Last Date of Exposure (Date)' with a dropdown arrow, 'within' with a dropdown arrow, a date range from '03/13/2022' to '03/16/2022', and a red minus button. At the bottom, there is a plus button and a note: 'Filter will be applied to all line lists until cleared by the user.' There are 'Cancel' and 'Apply' buttons at the bottom right.

**Figure 79: Delete a saved filter**

#### 10.2.4.3.4 Find Records with Blank Values in Certain Fields

You can use the Advanced Filter feature to find records where certain fields are blank or have no data. This may be helpful to your workflow and/or may help with data quality control.

The following Advanced Filters support a “blank” option:

- Close Contact With a Known Case ID
- Primary Contact Email
- First Name
- Last Date of Exposure
- Last Name
- Latest Report
- Lab Result (Specimen Collection Date, Result, Type, Report Date)
- Sara Alert ID
- Symptom Onset Date
- Primary Contact Telephone Number
- Vaccination (Administration Date, Dose Number)

For “Text” type Advanced Filters, leaving the text field blank and applying the filter will show records where that field is blank. Applying the filter in the example below would show only records where First Name is blank.

The screenshot shows the 'Advanced Filter: untitled' window. At the top left is a 'Save' button. Below it, there's a filter configuration area. The first dropdown is 'Name (Combination)', followed by a second dropdown set to 'first'. To the right of these is a text input field, which is empty and highlighted with an orange border. An orange callout box with the text 'Leave field blank' points to this field. To the right of the text field is a '+' button, and further right is a red '-' button. Below the filter configuration, there's a status message: 'Filter will be applied to all line lists until cleared by the user.' At the bottom right are 'Cancel' and 'Apply' buttons.

**Figure 80: For “Text” Advanced Filters, leave the text field blank to search for records where that field is blank.**

For “Date” type Advanced Filters, choose the “(Date)” option (not the “(Relative Date)” option) and choose the blank operator from the drop-down menu. Applying the filter below would show all records where the Last Date of Exposure is blank.

The screenshot shows the 'Advanced Filter: untitled' window. At the top left is a 'Save' button. Below it, there's a filter configuration area. The first dropdown is 'Last Date of Exposure (Date)'. To its right is another dropdown menu that is open, showing options: 'within', 'before', 'after', and 'blank'. The 'blank' option is highlighted with a blue background. An orange callout box with the text 'Choose the blank option' points to this option. Above the dropdown menu, an orange callout box with the text 'Choose the (Date) option' points to the 'Last Date of Exposure (Date)' dropdown. To the right of the dropdown menu is a red '-' button. Below the filter configuration, there's a status message: 'Filter will be applied to all line lists until cleared by the user.' At the bottom right are 'Cancel' and 'Apply' buttons.

**Figure 81: For “Date” Advanced Filters, choose the “(Date)” option, then choose the blank operator from the drop-down menu.**

For “Combination” type Advanced Filters, you can also use the “blank” operator to filter for records that have a Lab Result or Vaccination that is missing that specific data element.

## 10.2.5 How to Identify Heads of Households on the Dashboard

Monitorees who are Heads of Households (HoH) are indicated by an “HoH” icon: **HoH**. This icon appears to the right of the monitoree’s name on the dashboard.

Monitorees who have reported symptoms, which need to be reviewed. You are currently in the **exposure** workflow. [Clear All Filters](#)

Jurisdiction: USA All Exact Assigned User All None

Search:  Advanced Filter LastDateOfExposure\_03/28-03/31 Bulk Actions

Monitoree	Jurisdiction	Assigned User	State/Local ID	Date of Birth	Phone Number	End of Monitoring	Risk Level	Monitoring Plan	Latest Report
Test, Elvis <b>HoH</b>	State 29			11/12/1989		11/23/2020			12/15/2021 16:05 EST
Gaitung, Abdul	State 8		a013R000000WIXQA4	02/28/1973	437-609-7286	11/23/2021			12/15/2021 16:05 EST
Testington, Test	State 3		1234	11/25/1994		Continuous Exposure		None	12/15/2021 16:04 EST
Picaso, Albert <b>HoH</b>	State 10			04/01/1911	987-654-2314	Continuous Exposure		Daily active monitoring	12/15/2021 16:03 EST

Figure 82: The “HoH” icon indicates Heads of Households

## 10.2.6 How to Identify Monitorees whose Latest Report is Symptomatic

Active monitorees (i.e., not on the “Closed” line list) whose latest report meets the symptomatic logic are flagged with a red “alert” icon in the Latest Report column. This means that the report with the timestamp listed under “Latest Report” is symptomatic **AND** has not been “reviewed” to remove the symptomatic flag (see [page 85](#) for more information about marking symptomatic reports as “reviewed”).

Jurisdiction: USA All Exact Assigned User All None

Search:  Advanced Filter LastDateOfExposure\_03/28-03/31 Bulk Actions

Monitoree	Jurisdiction	Assigned User	State/Local ID	Date of Birth	Phone Number	End of Monitoring	Risk Level	Monitoring Plan	Latest Report
Test, Elvis <b>HoH</b>	State 29			11/12/1989		11/23/2020			12/15/2021 16:05 EST
Gaitung, Abdul	State 8		a013R000000WIXQA4	02/28/1973	437-609-7286	11/23/2021			12/15/2021 16:05 EST

Figure 83: The “Alert” icon indicates that the monitoree’s latest report was symptomatic.

## 10.2.7 How to Identify Monitorees who are Minors

Monitorees who are minors (under 18 years of age) are identified by a “child” icon in the Date of Birth column on the Monitoring Dashboards.

Jurisdiction: USA All Exact Assigned User All None

Search:  Advanced Filter LastDateOfExposure\_03/28-03/31 Bulk Actions






Monitoree	Jurisdiction	Assigned User	State/Local ID	Date of Birth	Phone Number	End of Monitoring	Risk Level	Monitoring Plan	Latest Report
Belanger, Wesley	USA			09/08/2021		12/02/2021		None	09/29/2021 14:22 EDT
france, tom	USA			11/17/2020		Continuous	Low	None	10/22/2021

Figure 84: The “child” icon indicates that the monitoree is under 18 years old.

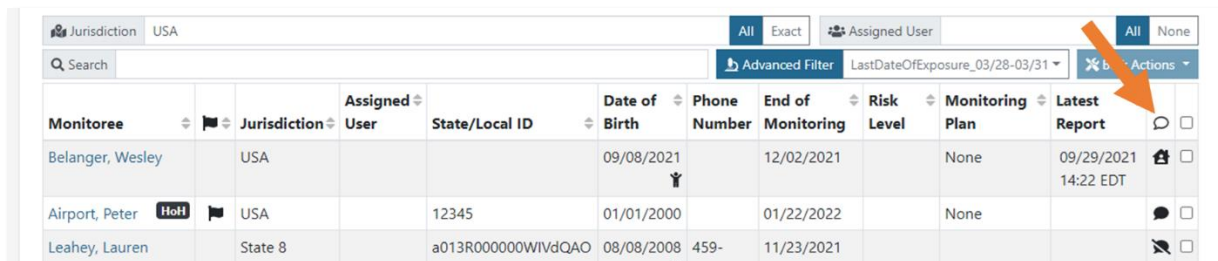
## 10.2.8 How to View Daily Notification Eligibility

A monitoree's notification status is shown as an icon on the monitoring dashboard as well as in the caption of a monitoree's report section. There are five possible icons:

**Table 7: Monitoree Notification Status Icon Definitions**

Icon	Meaning
	Monitoree is eligible to receive notifications from the system and is scheduled to receive one later today.
	The monitoree is eligible to receive notifications and has already responded today
	The monitoree is eligible to receive notifications and the system is waiting for a response.
	The monitoree is not eligible to receive notifications from the system
	The monitoree is in a Household, but not the Head of Household, so they will not receive notifications directly from the system. The Head of Household receives notifications instead.

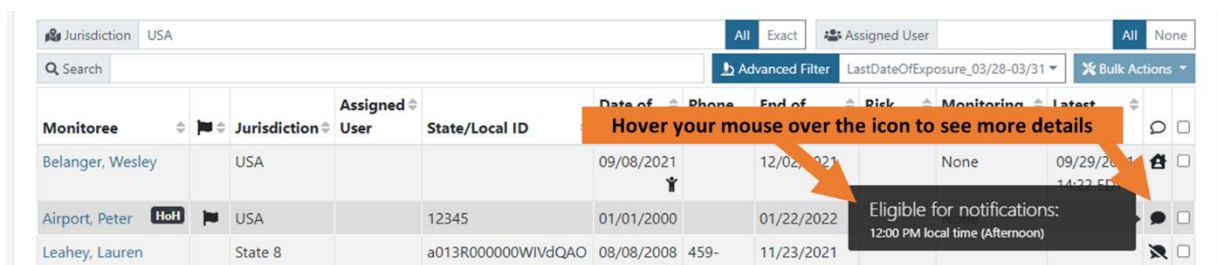
View the icon in the notification column. If you hover your cursor over the icon for a specific monitoree, you will see a detailed explanation of why a monitoree has a given status.



Monitoree	Jurisdiction	Assigned User	State/Local ID	Date of Birth	Phone Number	End of Monitoring	Risk Level	Monitoring Plan	Latest Report
Belanger, Wesley	USA			09/08/2021		12/02/2021		None	09/29/2021 14:22 EDT
Airport, Peter <b>HofH</b>	USA		12345	01/01/2000		01/22/2022		None	
Leahey, Lauren	State 8		a013R000000WIVdQAO	08/08/2008	459-	11/23/2021			

**Figure 85: The notification column in the user dashboard**

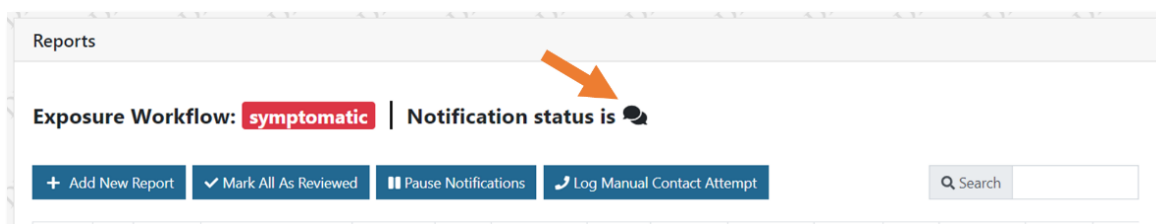
Hover your mouse over the icon to see more details.



Monitoree	Jurisdiction	Assigned User	State/Local ID	Date of Birth	Phone Number	End of Monitoring	Risk Level	Monitoring Plan	Latest Report
Belanger, Wesley	USA			09/08/2021		12/02/2021		None	09/29/2021 14:22 EDT
Airport, Peter <b>HofH</b>	USA		12345	01/01/2000		01/22/2022		None	
Leahey, Lauren	State 8		a013R000000WIVdQAO	08/08/2008	459-	11/23/2021			

**Figure 86: Hovering your mouse over the icon will reveal more details**

You can also find a monitoree's Notification Status icon in the Reports section of their record.




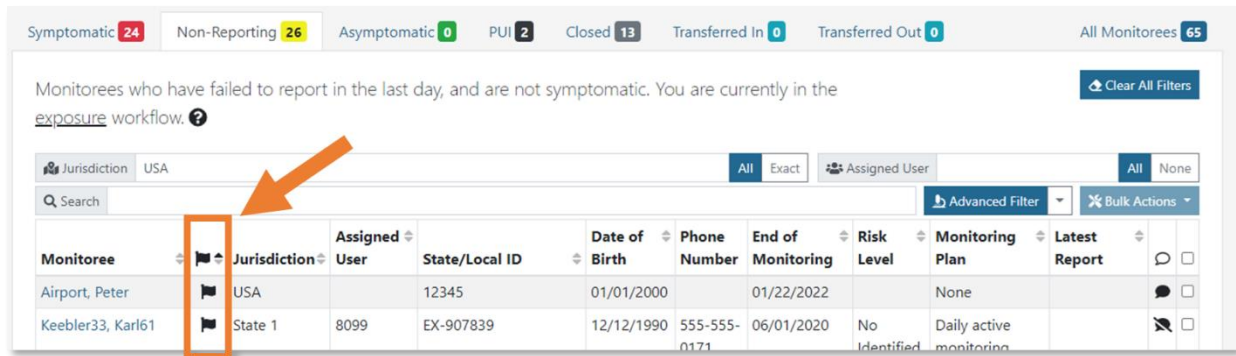
**Figure 87: The notification column in the user dashboard**

## 10.2.9 How to Flag a Record for Follow-up

**Public Health** users, **Public Health Enrollers**, **Contact Tracers**, and **Super Users** can manually flag records for follow-up for the reasons listed below. Always refer to your organization's guidelines on how to use the follow-up flag feature and how to use or interpret the different reasons for flagging a record.

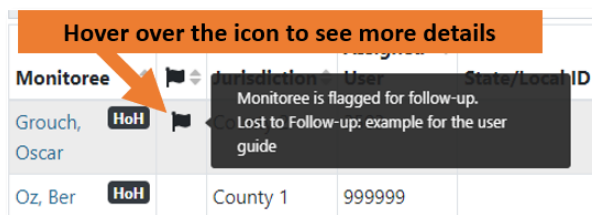
- **Deceased:** Monitoree may be deceased
- **Duplicate:** Monitoree may have another record in Sara Alert
- **High-Risk:** Monitoree is part of a high-risk population for the disease of interest
- **Hospitalized:** Monitoree has been admitted to a hospital
- **In Need of Follow-up:** Monitoree needs follow-up
- **Lost to Follow-up:** Monitoree meets jurisdiction criteria for being considered lost to follow-up
- **Needs Interpretation:** Monitoree needs a language interpreter
- **Quality Assurance:** Monitoree's record data needs to be reviewed and corrected if necessary
- **Refused Active Monitoring:** Monitoree has refused monitoring from Sara Alert
- **Other**

Follow-up flags can be set from a record or from the dashboard using a bulk action (see **page 81** for more information about bulk actions). Records that have been flagged will show a  icon in the Flag for Follow-up column on the Monitoring Dashboards. The Flag for Follow-up Advanced Filter (details on **page A-1**) can be used to find all monitorees on your current line list who have been flagged or who have been flagged for a specific reason.



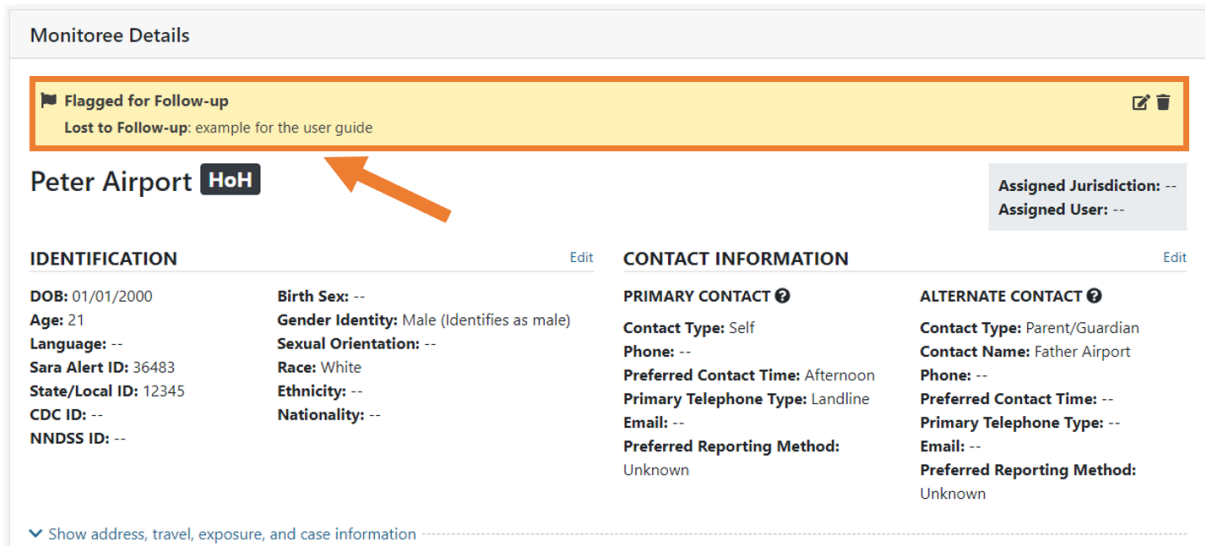
**Figure 88: The Flag for Follow-up icon in the dashboard**

Hover your mouse over the icon to see the Flag for Follow-up reason, and any associated notes.



**Figure 89: Hovering your mouse over the icon will reveal more details**

You can also view whether monitoree has been flagged in the Monitoree Details section of their record.



**Monitoree Details**

**Flagged for Follow-up**  
Lost to Follow-up: example for the user guide

**Peter Airport** **HoH**

**Assigned Jurisdiction:** --  
**Assigned User:** --

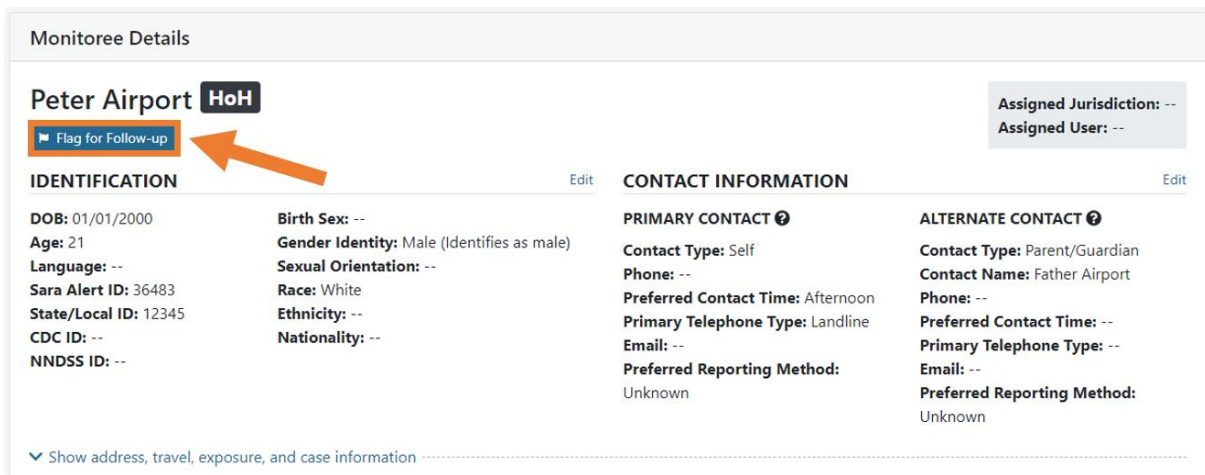
IDENTIFICATION		CONTACT INFORMATION	
DOB: 01/01/2000	Birth Sex: --	<b>PRIMARY CONTACT</b> ⓘ	<b>ALTERNATE CONTACT</b> ⓘ
Age: 21	Gender Identity: Male (Identifies as male)	Contact Type: Self	Contact Type: Parent/Guardian
Language: --	Sexual Orientation: --	Phone: --	Contact Name: Father Airport
Sara Alert ID: 36483	Race: White	Preferred Contact Time: Afternoon	Phone: --
State/Local ID: 12345	Ethnicity: --	Primary Telephone Type: Landline	Preferred Contact Time: --
CDC ID: --	Nationality: --	Email: --	Primary Telephone Type: --
NNDSS ID: --		Preferred Reporting Method: Unknown	Email: --
			Preferred Reporting Method: Unknown

▼ Show address, travel, exposure, and case information

Figure 90: The top of the Monitoree Details section shows if a record is flagged

### 10.2.9.1 How to add a Flag for Follow-up from a Record

1) To add a flag from a monitoree's record, select the "Flag for Follow-up" button located beneath the monitoree's name in Monitoree Details:



**Monitoree Details**

**Peter Airport** **HoH**

**Flag for Follow-up**

**Assigned Jurisdiction:** --  
**Assigned User:** --

IDENTIFICATION		CONTACT INFORMATION	
DOB: 01/01/2000	Birth Sex: --	<b>PRIMARY CONTACT</b> ⓘ	<b>ALTERNATE CONTACT</b> ⓘ
Age: 21	Gender Identity: Male (Identifies as male)	Contact Type: Self	Contact Type: Parent/Guardian
Language: --	Sexual Orientation: --	Phone: --	Contact Name: Father Airport
Sara Alert ID: 36483	Race: White	Preferred Contact Time: Afternoon	Phone: --
State/Local ID: 12345	Ethnicity: --	Primary Telephone Type: Landline	Preferred Contact Time: --
CDC ID: --	Nationality: --	Email: --	Primary Telephone Type: --
NNDSS ID: --		Preferred Reporting Method: Unknown	Email: --
			Preferred Reporting Method: Unknown

▼ Show address, travel, exposure, and case information

Figure 91: Select the "Flag for Follow-up" button

2) Select a reason for the flag, and add any additional details in the “Notes” field:

**Figure 92: Select a reason for the flag, and add any notes**

3) If the monitoree is in a household, you can choose to apply the flag to the selected monitoree, or to selected members of the monitoree’s household.

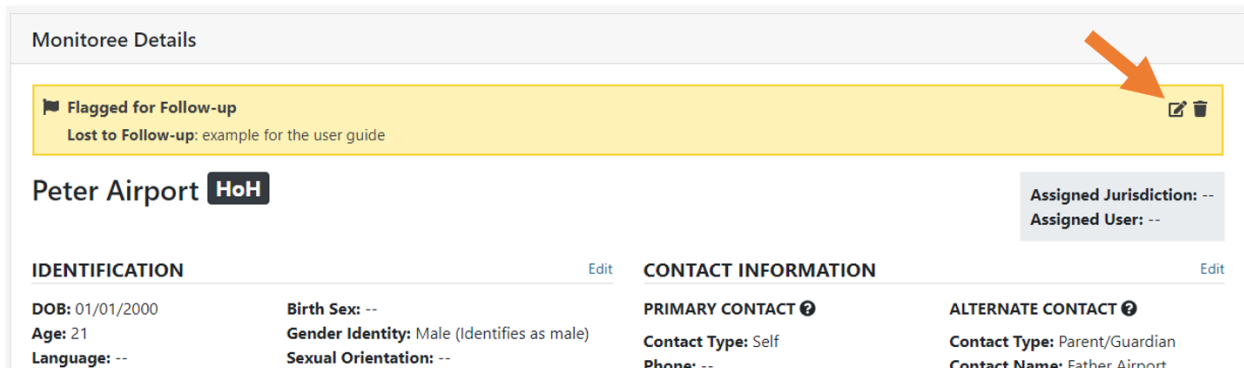
<input type="checkbox"/>	Name	Date of Birth	Workflow	Monitoring Status	Continuous Exposure?
<input checked="" type="checkbox"/>	Airport, Pepperoni	01/01/1976	Exposure	Not Monitoring	No
<input type="checkbox"/>	Person, Example	01/01/2000	Exposure	Not Monitoring	No

**Figure 93: Choose which monitorees to apply the flag to**



### 10.2.9.2 How to Edit or Clear a Flag for Follow-up from a Record

1) To update an existing flag from a monitoree's record, click the "Edit" icon in the upper-right corner of the flag for follow-up banner.



Monitoree Details

**Flagged for Follow-up**  
Lost to Follow-up: example for the user guide

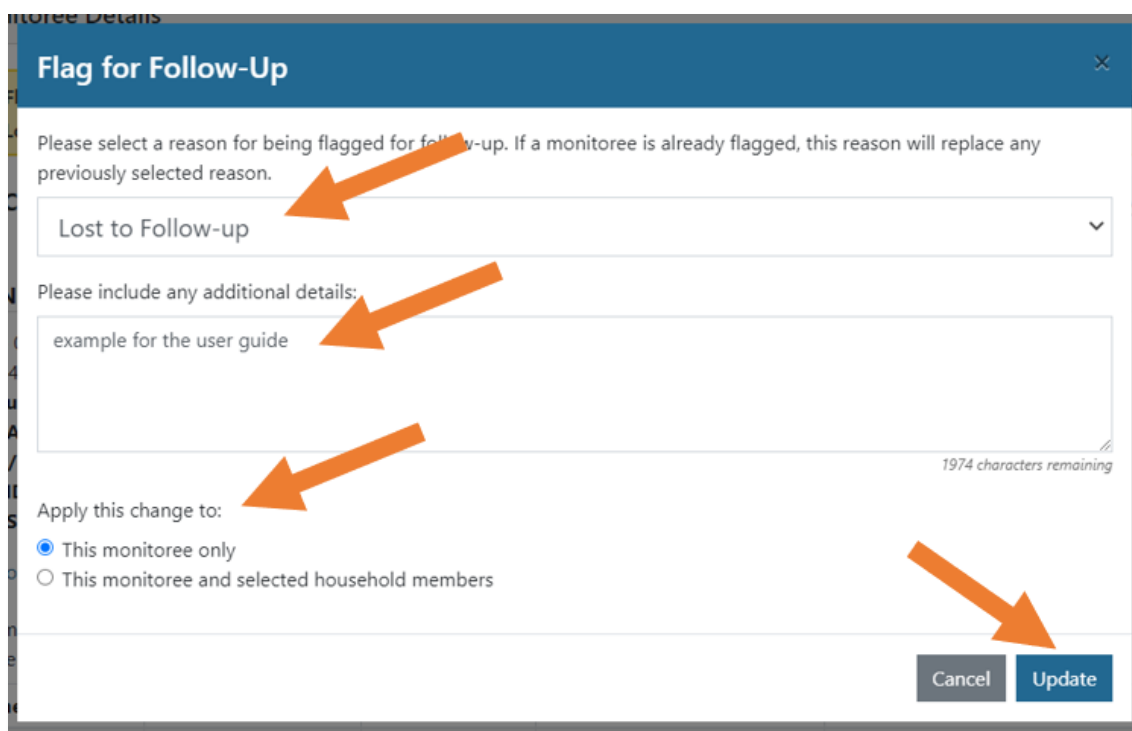
Peter Airport **HoH**

Assigned Jurisdiction: --  
Assigned User: --

IDENTIFICATION		CONTACT INFORMATION	
DOB: 01/01/2000	Birth Sex: --	PRIMARY CONTACT ⓘ	ALTERNATE CONTACT ⓘ
Age: 21	Gender Identity: Male (Identifies as male)	Contact Type: Self	Contact Type: Parent/Guardian
Language: --	Sexual Orientation: --	Phone: --	Contact Name: Father Airport

**Figure 94:** Select the "Edit" icon to update an existing flag.

2) The window will automatically show the existing reason for the flag and notes. After completing any desired changes, choose which household members to apply the change to (if applicable), and click "Update."



**Flag for Follow-Up**

Please select a reason for being flagged for follow-up. If a monitoree is already flagged, this reason will replace any previously selected reason.

Lost to Follow-up

Please include any additional details:

example for the user guide

1974 characters remaining

Apply this change to:

☒ This monitoree only

☐ This monitoree and selected household members

Cancel Update

**Figure 95:** Make any desired changes, and click "Update" to save.



3) To clear an existing flag from a monitorer's record, click the "Delete" icon in the upper-right corner of the flag for follow-up banner.

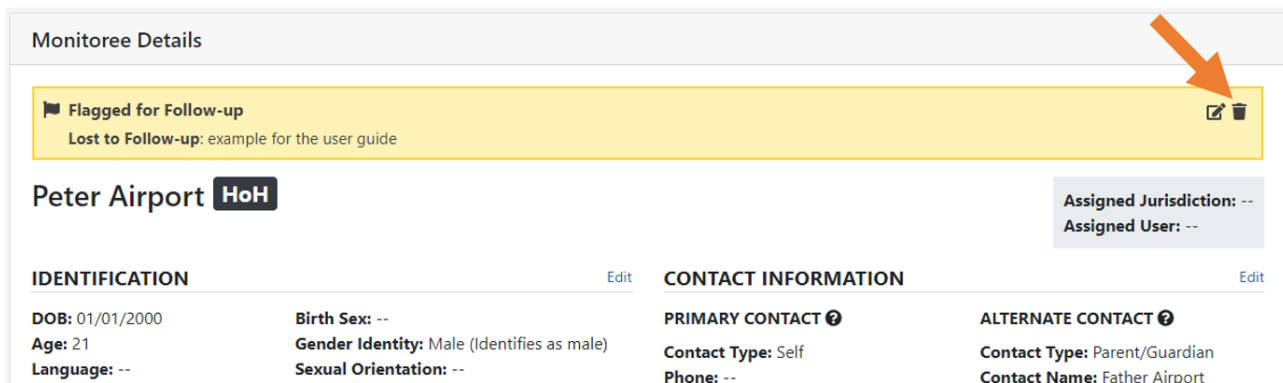


Figure 96: Select the "Delete" icon to clear an existing flag

4) Choose whether to clear the flag for just the monitorer or for selected household members (if applicable), add any relevant notes, and click "Clear."

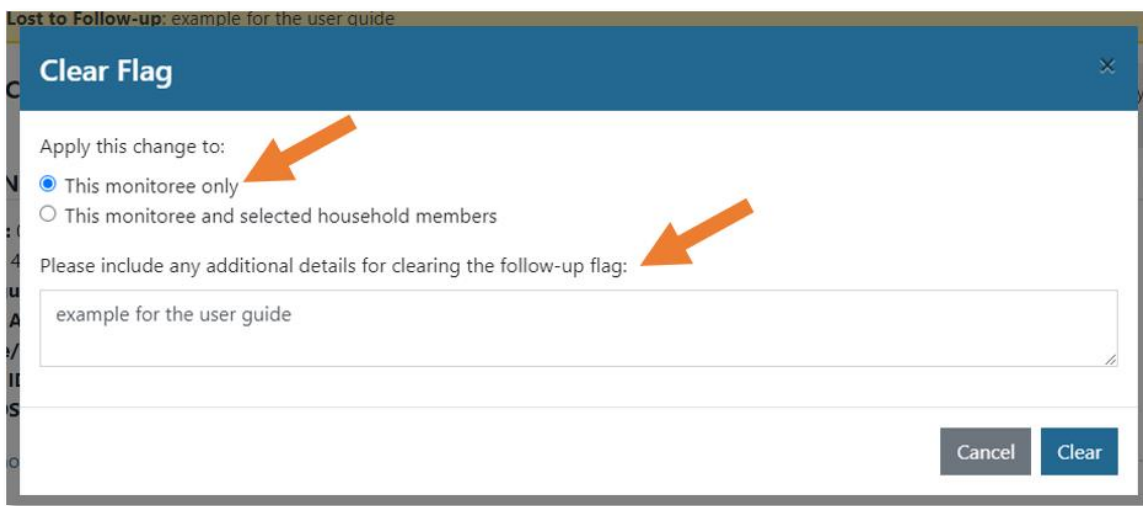


Figure 97: Select which monitorees you'd like to clear the flag for, and add any notes

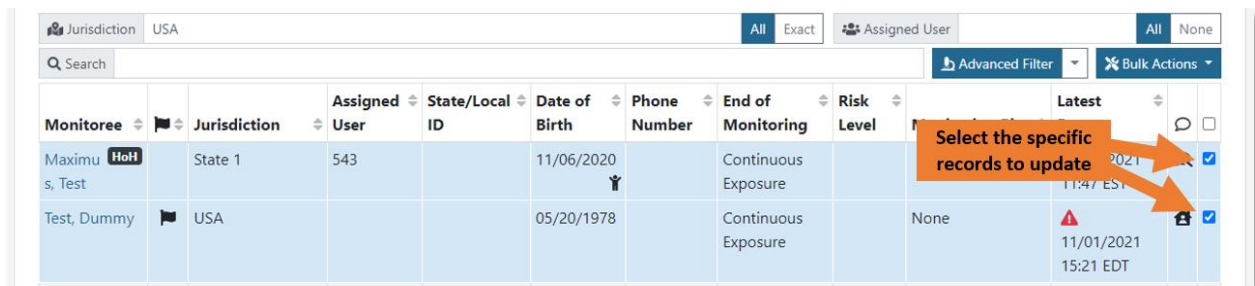
### 10.2.10 How to Make Updates for Multiple Monitoree Records in the Same Line List from Dashboard

**Public Health** users, **Public Health Enrollers**, **Contact Tracers**, and **Super Users** can update multiple monitorees in a line list at a time using the Actions menu. The list of available actions will increase over time. Currently users can update the following fields using this feature:

- Monitoring Status (i.e., to "open" or "close" records)
- Case Status (i.e., to move monitorees between workflows)
- Assigned User
- Flag for Follow-Up

**NOTE:** The ability to update Case Status using a bulk action is not available from line lists in the Global dashboard.

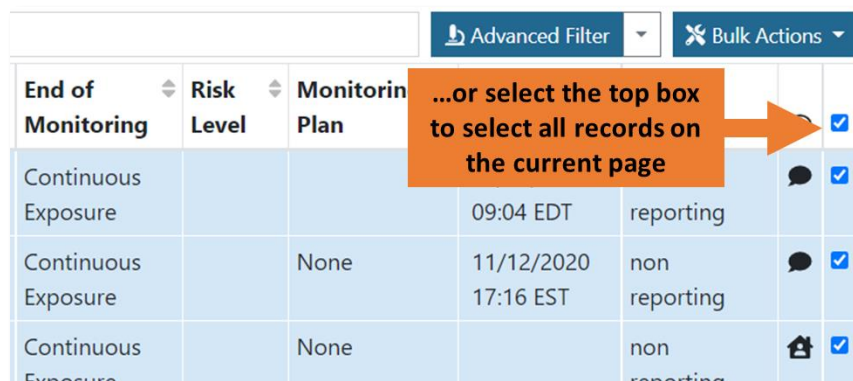
1) Select the records to modify by clicking the checkbox located in the rightmost column.



Monitoree	Jurisdiction	Assigned User	State/Local ID	Date of Birth	Phone Number	End of Monitoring	Risk Level	Latest	
Maximu s, Test	State 1	543		11/06/2020		Continuous Exposure		2021	<input checked="" type="checkbox"/>
Test, Dummy	USA			05/20/1978		Continuous Exposure	None	11/01/2021 11:47 EST 15:21 EDT	<input checked="" type="checkbox"/>

**Figure 98: Select the records to modify**

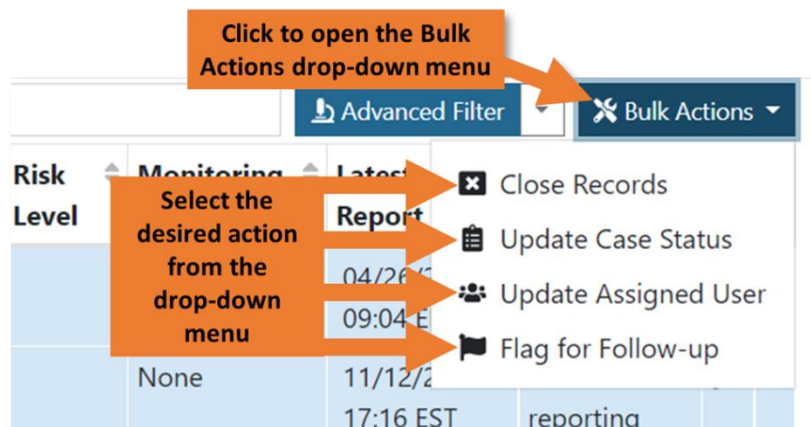
Select all records shown by clicking the topmost checkbox. Users can update up to 100 records at once by changing the “Show entries” box and clicking the checkbox at the top of the column.



End of Monitoring	Risk Level	Monitoring Plan		
Continuous Exposure			09:04 EDT	reporting
Continuous Exposure		None	11/12/2020 17:16 EST	non reporting
Continuous Exposure		None		non reporting

**Figure 99: Click the topmost checkbox to select all records shown.**

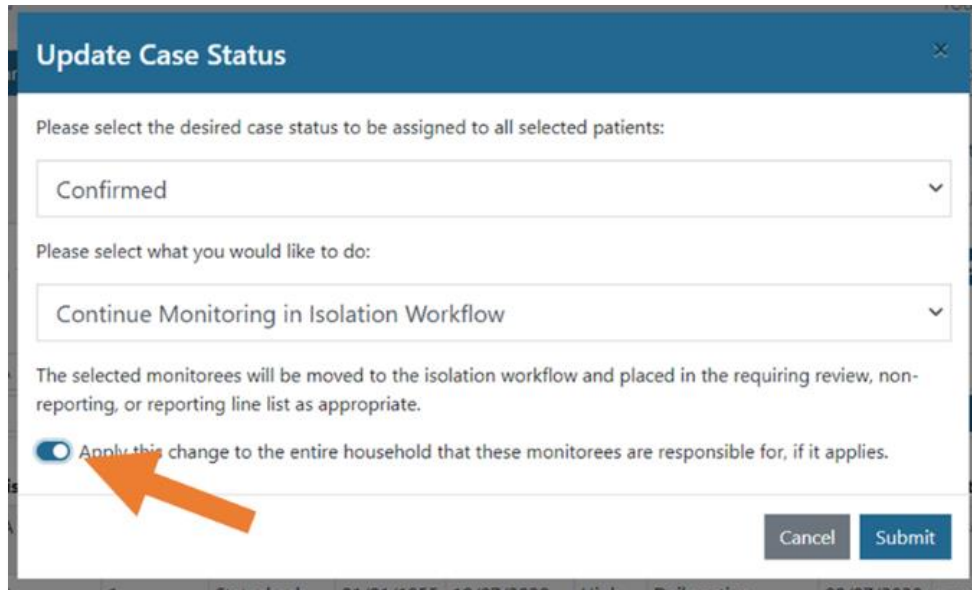
2) Click “**Bulk Actions**” and select the appropriate action that you would like to apply to the selected monitoree records.



Risk Level	Monitoring	Latest	
		Report	
		04/26/21	
		09:04 EDT	
	None	11/12/2020 17:16 EST	reporting

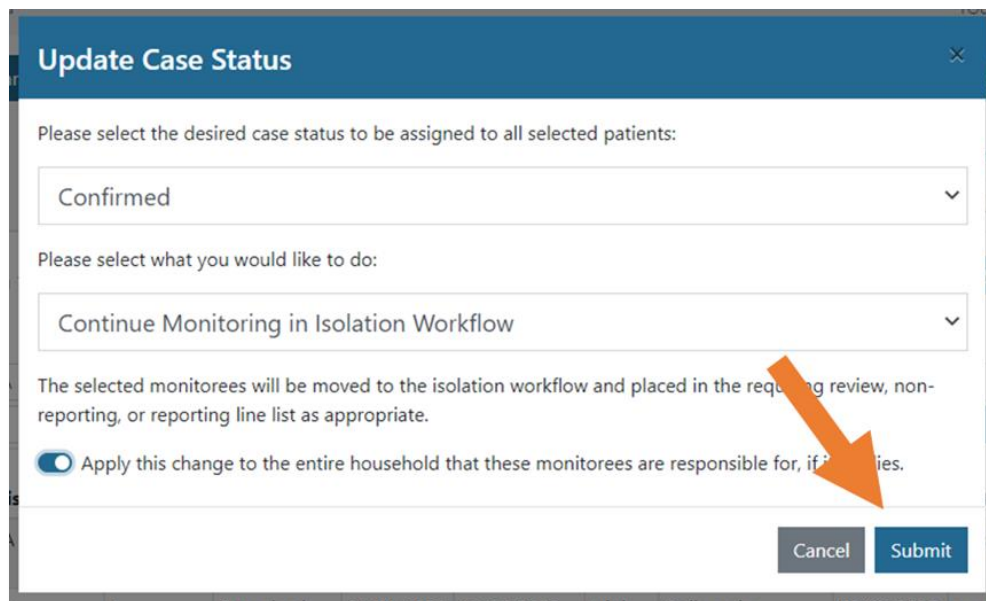
**Figure 100: Click "Bulk Actions" to open the drop-down of potential actions, choose the desired action from the list.**

3) You can then make updates to the selected monitorees. If any of the selected monitorees are Heads of Household, you can choose to also apply the changes to the other monitorees in their Household by clicking the toggle for “Apply this change to the entire household that this monitoree is responsible for, if it applies.” This will apply the action to all selected records **AND** all household members of all selected records.



**Figure 101: Click toggle to apply changes to the monitoree’s entire household**

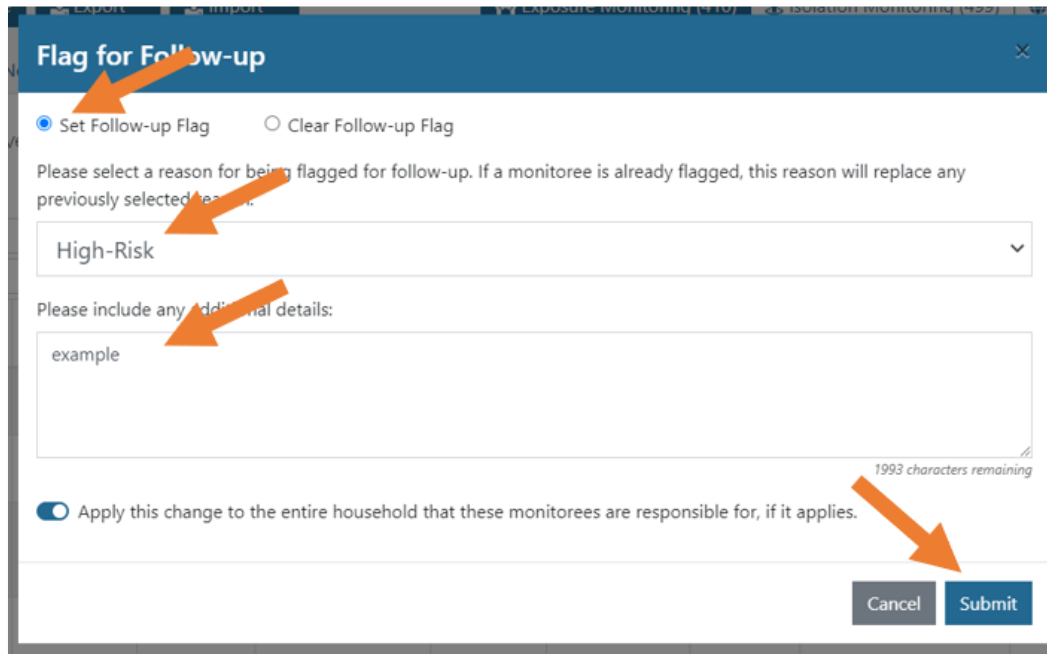
4) Click “**Submit**” to save the changes and complete the action.



**Figure 102: Click "Submit" to save the changes and close the window**

### 10.2.10.1 Setting or Updating Follow-Up Flags Through a Bulk Action

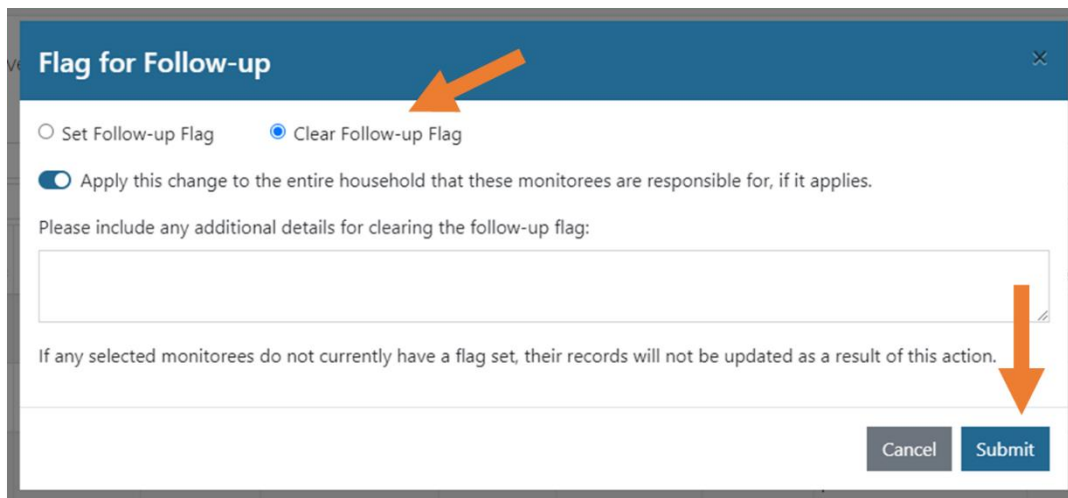
1) To update or add a flag for follow-up for all selected monitorees, select “Set Follow-up Flag” and enter a reason and any notes. If the selected monitorees are already flagged for the same reason, that reason will appear by default. If the selected monitorees have not yet been flagged, or share different reasons for flag, the top field will instead default to blank, and any submitted information will overwrite the previous flag reason or notes.



The screenshot shows a modal titled "Flag for Follow-up". At the top, there are two radio buttons: "Set Follow-up Flag" (selected) and "Clear Follow-up Flag". Below this, a text prompt says: "Please select a reason for being flagged for follow-up. If a monitoree is already flagged, this reason will replace any previously selected reason." A dropdown menu shows "High-Risk". Below that, another text prompt says: "Please include any additional details:" followed by a text area containing "example". A character count "1993 characters remaining" is visible. At the bottom, there is a checkbox labeled "Apply this change to the entire household that these monitorees are responsible for, if it applies." which is checked. At the bottom right are "Cancel" and "Submit" buttons. Orange arrows point to the "Set Follow-up Flag" radio button, the "High-Risk" dropdown, the "example" text, and the "Submit" button.

**Figure 103: Enter Flag for Follow-up details and click Submit**

2) To clear a flag for follow-up for all selected monitorees, select “Clear Follow-up Flag” from the modal and provide any applicable notes. This option will not be clickable if none of the selected monitorees have a flag for follow-up. Click “Submit” to save the changes and close the window.



The screenshot shows the same "Flag for Follow-up" modal, but now the "Clear Follow-up Flag" radio button is selected. The "Apply this change to the entire household that these monitorees are responsible for, if it applies." checkbox remains checked. Below the checkbox, a text prompt says: "Please include any additional details for clearing the follow-up flag:" followed by an empty text area. A note at the bottom states: "If any selected monitorees do not currently have a flag set, their records will not be updated as a result of this action." The "Submit" button is highlighted with an orange arrow.

**Figure 104: Select “Clear Follow-up Flag” to delete the follow-up flag for selected records.**

## 10.3 How to Move Monitorees Between Line Lists on the Exposure Workflow Dashboard

The exposure monitoring workflow allows public health officials 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. This section covers the ways in which

**Public Health** users, **Public Health Enrollers**, **Contact Tracers**, and **Super Users** can move monitorees between line lists in the Exposure Workflow.

**TIP:** See the [Possible Scenarios for Exposure Monitoring Quick Start Guide](#)

A video tutorial for this section is available at: <https://saraalert.org/public-health/training/>

### 10.3.1 From the Symptomatic Line List to the Non-Reporting or Asymptomatic Line Lists

Monitorees who have a **Symptom Onset Date** appear on the Symptomatic line list. See [page 39](#) for a description of how **Symptom Onset Date** is generated. If a public health official follows up with a monitoree and determines that the symptoms connected to the **Symptom Onset Date** are not clinically compatible with the disease of interest, the user should take the following steps **in the following order** to move the monitoree off of the Symptomatic line list.

- 1) Remove the symptomatic flag from any reports of symptoms that are determined to be **unrelated** to the disease of interest by using the “**Review**” functionality.
- 2) If a **Symptom Onset Date** that was manually entered by a user is determined to not reflect the onset of symptoms related to the disease of interest, delete the **Symptom Onset Date** field.

These steps are explained in greater detail below. After making these changes, the system will move the monitoree out of the “Symptomatic” line list to either the “Asymptomatic” line list unless the most recent report is older than 24 hours, in which case they will move to the “Non-Reporting” line list.

#### 10.3.1.1 Mark Symptomatic Reports as Unrelated to the Disease of Interest Using “Review”

- 1) Click on the “**Symptomatic**” line list to view monitorees who reported symptoms and require public health review. Click on a monitoree’s name to view their record.

Exposure Dashboard Your Jurisdiction: USA

Enroll New Monitoree Export Import Exposure Monitoring (221) Isolation Monitoring (367) Global Dashboard (588)

Symptomatic 73 Non-Reporting 64 Asymptomatic 0 PUI 23 Closed 61 Transferred In 0 Transferred Out 0 All Monitorees 221

Monitorees who have reported symptoms, which need to be reviewed. You are currently in the [exposure](#) workflow. Clear All Filters

Jurisdiction USA All Exact Assigned User All None

Search Advanced Filter Bulk Actions

Monitoree	Jurisdiction	Assigned User	State/Local ID	Date of Birth	Phone Number	End of Monitoring	Risk Level	Monitoring Plan	Latest Report
Maximus HoH Test	State 1			11/06/2020		Continuous Exposure			11/15/2021 11:47 EST

Figure 105: View a symptomatic monitoree’s record

2) Scroll down to view “**Reports.**” Reports flagged as “symptomatic” by the system are highlighted in red. The public health user should follow up with the individual to assess the report and determine appropriate next steps. If disease is suspected, see instructions on how to move a monitoree to the PUI line list (**page 89**) or the isolation workflow (**page 112**).

Reports

Exposure Workflow: **symptomatic** | Notification status is

+ Add New Report | ✓ Mark All As Reviewed | || Pause Notifications | Log Manual Contact Attempt

Search

Actions	ID	Needs Review	Reporter	Reported At	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
	1554	Yes	Monitoree	10/23/2020 09:22 EDT	No	No	No	No	Yes	No	No	No	No	No	No	No	No

Figure 106: Monitoree reports table shows symptoms by report date and time

3) If after review, the disease of interest is **NOT** suspected (e.g., another clinical explanation or data entry error), clear the symptomatic flag from a specific report by first clicking that report’s “**Actions**” button to open the drop-down menu. Then click “**Review**.” If the earliest symptomatic report is **Reviewed** and the **Symptom Onset Date** was never manually entered, the **Symptom Onset Date** will change to match the date of the next earliest report.

+ Add New Report | ✓ Mark All As Reviewed | || Pause Notifications | Log Manual Contact Attempt

Search

Actions	ID	Needs Review	Reporter	Reported At	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
	1250	Yes	Monitoree	10/01/2020 15:47 EDT	No	No	Yes	No	No	Yes	No	No	Yes	No	No	No	No
Edit Add Note ✓ Review			Monitoree	10/01/2020	No	No	No	No	No	No	No	Yes	No	No	No	No	No
			Monitoree	10/03/2020	No	No	No	No	No	No	No	No	No	No	No	No	No

Figure 107: Mark a single report as reviewed

4) A user can also clear all symptomatic flags from all of a monitoree’s reports by clicking “**Mark All As Reviewed**” to indicate that the disease of interest is not suspected after review of this monitoree’s report(s). The symptom onset date field will also be cleared unless a date has been entered by a user. Any changes to **Symptom Onset Date** are logged in the record’s history.

Reports

Exposure Workflow: **symptomatic** | Notification status is

+ Add New Report | ✓ Mark All As Reviewed | || Pause Notifications | Log Manual Contact Attempt

Search

Actions	ID	Needs Review	Reporter	Reported At	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
	1554	Yes	Monitoree	10/23/2020 09:22 EDT	No	No	No	No	No	No	No	No	No	No	No	No	No

Figure 108: Mark the report as reviewed to move the monitoree out of the “Symptomatic” line list



5) If you choose to mark all records as reviewed, carefully note the resulting logic that is described in the confirmation window.

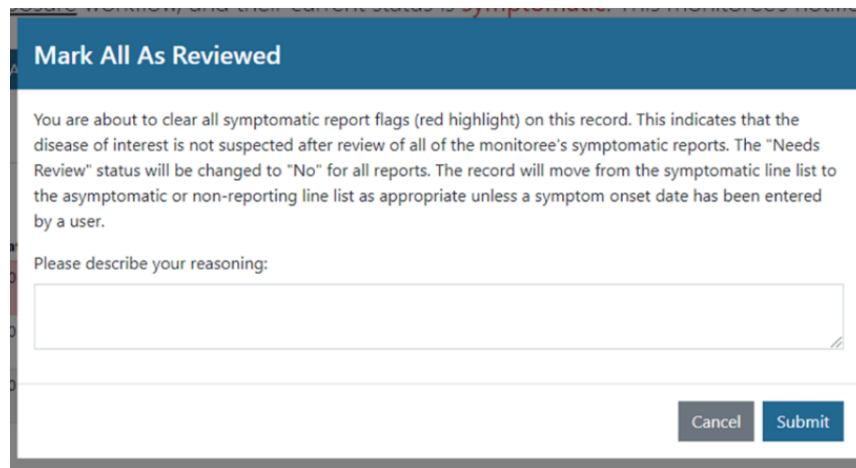


Figure 109: Note the logic for marking daily reports as reviewed

6) The symptom onset date will reset unless a date had been manually entered.

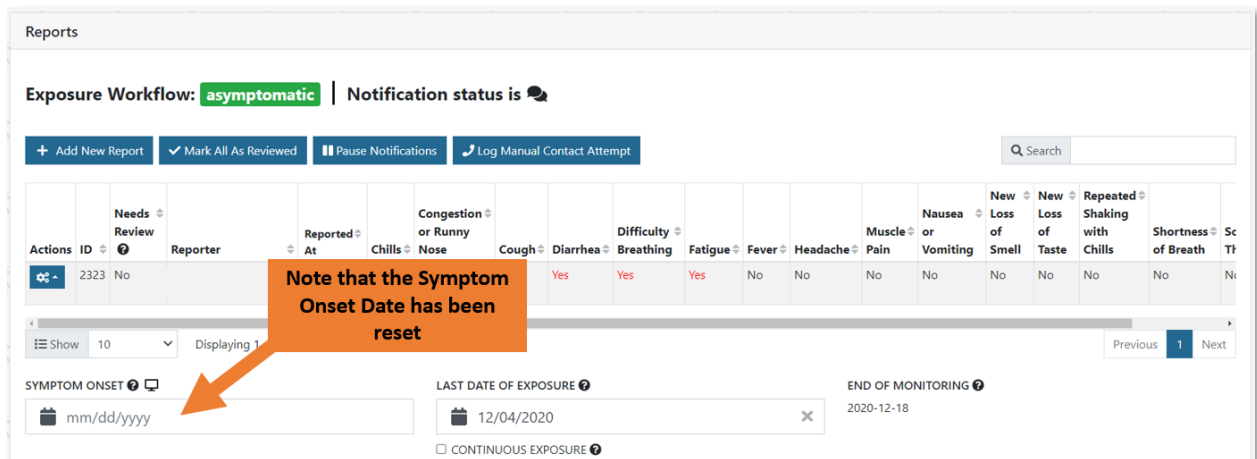


Figure 110: The symptom onset date has reset

### 10.3.1.2 Clear a Manually Entered Symptom Onset Date

If a user manually entered a **Symptom Onset Date** for the monitoree, using the “**Review**” functionality for symptomatic reports will not clear this date. The monitoree will remain on the symptomatic line list until the **Symptom Onset Date** is manually cleared by the user and all reports have been marked as reviewed.

**NOTE:** A symbol will appear to the right of the Symptom Onset Date field which indicates if the date has been auto-populated by the system or defined by a user.

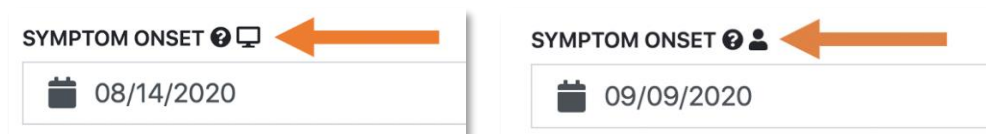


Figure 111: Symbols for System (left) and User-Defined (right) Symptom Onset Date

1) To clear the **Symptom Onset Date**, highlight the date and delete it.

The screenshot shows the SARA Alert interface. At the top, there are buttons: '+ Add New Report', '✓ Mark All As Reviewed', '⏸ Pause Notifications', and '📝 Log Manual Contact Attempt'. A search bar is on the right. Below these is a table with columns for various 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, and Shortness of Breath. The table has rows for different dates, with the first row showing '2/21/2020' and '2/21 EST'. Below the table, there are three date fields: 'SYMPTOM ONSET' (with a calendar icon and the date '12/14/2020'), 'LAST DATE OF EXPOSURE' (with a calendar icon and the date '12/04/2020'), and 'END OF MONITORING' (with the date '2020-12-18'). An orange arrow points to the 'SYMPTOM ONSET' date field. At the bottom, there is a checkbox for 'CONTINUOUS EXPOSURE'.

**Figure 112: Highlight and Delete the Symptom Onset Date**

2) The system will now auto-populate this field as the date of the earliest report that needs review, if any. If all reports have been marked as reviewed, this field will appear blank and will be auto-populated if a symptomatic report is received. The change will be noted in the History section and tagged as a “Monitoring Change.”

3) Once the date has been cleared, either of the following results will occur, depending on whether the monitoree has symptomatic, unreviewed reports:

- If there **are** symptomatic, unreviewed reports for this monitoree:
  - The system will auto-populate Symptom Onset Date with the date of the earliest unreviewed symptomatic report.
  - To clear the new Symptom Onset Date, review all such reports (see **page 85**).
- If there **are not** symptomatic, unreviewed reports for this monitoree:
  - The monitoree will move to the Asymptomatic or Non-Reporting Line list.
  - The Symptom Onset Date will automatically re-populate with the date of any **subsequent** symptomatic reports.

4) The change will be captured in the “History” section of the monitoree’s record.

The screenshot shows a notification box with a header bar. The header bar contains the text 'example@email.com, less than a minute ago (2020-10-08 15:58 EDT)' on the left and a button labeled 'Monitoring Change' on the right. Below the header bar, the main text of the notification reads: 'User cleared Symptom Onset Date from "10/14/2020" to blank. The system will now populate this date.'

**Figure 113: Changes will be captured in the History section**



### 10.3.2 Moving a Monitoree to the PUI Line List

Monitorees who public health officials are investigating to determine if they meets the case definition can be moved from any Exposure line list to the PUI line list by documenting a public health action.

1) Click on the monitoree's name to open their record.

Active 519 Priority Review 418 Non-Reporting 78 Closed 69 All Monitorees 588

All Monitorees in this jurisdiction across both the exposure and isolation workflows. You are currently in the [global](#) dashboard. [Clear All Filters](#)

Jurisdiction USA All Exact Assigned User All None

Search widow Advanced Filter untitled Bulk Actions

Monitoree	Jurisdiction	Assigned User	State/Local ID	Date of Birth	Phone Number	End of Monitoring	Monitoring Plan	Reporter ID	Latest Report	Workflow	Status
Widow, Black	USA			06/02/2021		Continuous Exposure	None	1164	06/24/2021	Exposure	symptomatic

Figure 114: Click on a monitoree's name to open their record

2) Under “Monitoring Actions” change the “Latest Public Health Action” to anything other than “None.” You will be prompted to include any additional details.

Monitoring Actions

MONITORING STATUS: Actively Monitoring

EXPOSURE RISK ASSESSMENT: [Empty]

MONITORING PLAN: Self-monitoring with delegated supervision

CASE STATUS: [Empty]

LATEST PUBLIC HEALTH ACTION: [Dropdown menu open]

ASSIGNED USER: 8099 Change User

ASSIGNED JURISDICTION: USA, State 2 Change Jurisdiction

Latest Public Health Action options:

- None
- Recommended medical evaluation of symptoms
- Document results of medical evaluation
- Recommended laboratory testing

Figure 115: Select a public health action to move a monitoree to the “PUI” list

3) The monitoree record will be updated and moved to the “PUI” line list. This monitoree will continue to receive daily report requests from the system.

Symptomatic 72 Non-Reporting 64 Asymptomatic 0 PUI 24 Closed 61 Transferred In 0 Transferred Out 0 All Monitorees 221

Monitorees who are currently under investigation. You are currently in the [exposure](#) workflow. [Clear All Filters](#)

Jurisdiction USA All Exact Assigned User All None

Search widow Advanced Filter untitled Bulk Actions

Monitoree	Jurisdiction	Assigned User	State/Local ID	Date of Birth	Phone Number	End of Monitoring	Risk Level	Latest Public Health Action	Latest Report
Widow, Black	USA			06/02/2021		Continuous Exposure		Document results of medical evaluation	06/24/2021 10:18 EDT

Figure 116: The monitoree now appears in the “PUI” line list

## 10.4 How to Move Monitorees Between Line Lists on the Isolation Workflow Dashboard

The isolation monitoring workflow allows public health to monitor cases daily to determine when they meet a recovery definition and it is safe to discontinue home isolation. This section covers the ways in which **Public Health users, Public Health Enrollers, Contact Tracers, and Super Users** can move monitorees between line lists in the Isolation Workflow.

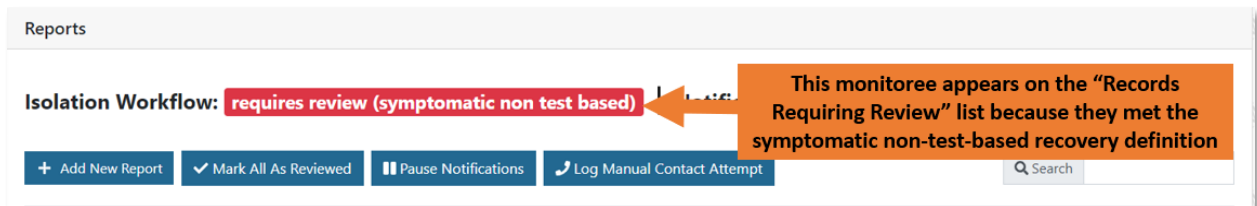
A video tutorial for this section is available at: <https://saraalert.org/public-health/training/>

### 10.4.1 From the Reporting Line List to the Records Requiring Review Line List

**Tip:** See the [Possible Scenarios for Isolation Monitoring Quick Start Guide](#)

Sara Alert™ will signal that a case meets the logic to appear on the “Records Requiring Review” line list by moving the record there. The system automatically moves records when any of the recovery definitions (configured specifically for the disease being monitored) are met. Any cases that appear on this line list require review by public health to validate that it is safe for the monitoree to discontinue isolation. Different recovery logic configurations may depend only on data supplied by the monitorees (like symptom history) or may depend on information inputted from public health users (like lab results).

The recovery definitions for COVID-19 can be found on **page 44**. The COVID-19 *symptomatic non-test-based* condition relies only on data supplied by the monitorees, while the COVID 19 *test-based* and *asymptomatic non-test-based* recovery logic requires input from public health users (i.e., documentation of relevant laboratory tests). To help orient users to which information needs to be validated, the monitoring status located at the top of the reports section specifies which recovery definition was met.



**Figure 117: The recovery definition met is shown on each record that requires review**

**NOTE:** For COVID-19, newly enrolled or imported cases for whom the Symptom Onset Date is >10 days ago AND who have at least one daily report that meets the recovery definition reporting requirements may show up on the “Records Requiring Review” list.

### 10.4.2 From the Records Requiring Review Line List to the Reporting or Non-Reporting Line List by Extending Monitoring

When a monitoree meets any of the system’s recovery definitions (see **page 44**) they will automatically move from the Reporting or Non-Reporting line lists to the Records Requiring Review line list. This flags the monitoree as someone who may be able to be removed from isolation. If, after following up with the monitoree, a user determines this individual should not yet be removed from isolation, they can extend isolation by setting or updating the **Extend Isolation To** date in the monitoree’s record.

If a user sets an **Extend Isolation To** date, the monitoree will not be eligible to appear on the Records Requiring Review list until that date has passed (and they again meet one of the system's recovery definitions).

1) Click on the monitoree's record and scroll to the Reports section. The **Extend Isolation To** field is located below the Reports table.

Reports

Isolation Workflow: **requires review (symptomatic non test based)** | Notification status is

+ Add New Report | ✓ Mark All As Reviewed | || Pause Notifications | Log Manual Contact Attempt

Search

Actions	ID	Needs Review	Reporter	Created At	Chills	Congestion or Runny Nose	Cough	Diarrhea	Difficulty Breathing	Fatigue	Fever	Headache	Muscle Pain	Nausea or Vomiting	New Loss of Smell
	1566	No		09/01/2021 12:14 EDT	No	No	No	No	No	No	No	No	No	No	No

Show 10 | Displaying 1 out of 1 rows.

SYMP TOM ONSET 05/31/2020

EXTEND ISOLATION TO mm/dd/yyyy

Previous 1 Next

Figure 118: Update relevant information that system uses to determine if recovery is met

2) Adding a current or future **Extend Isolation To** date will move the monitoree to either the Reporting or Non-Reporting line list until that date has passed.

Isolation Workflow: **reporting** | Notification status is

+ Add New Report | ✓ Mark All As Reviewed | || Pause Notifications | Log Manual Contact Attempt

Search

Actions	ID	Needs Review	Reporter	Created At	Chills	Congestion or Runny Nose	Cough	Diarrhea	Difficulty Breathing	Fatigue	Fever	Headache	Muscle Pain	Nausea or Vomiting	New Loss of Smell
	1566	No		09/01/2021 12:14 EDT	No	No	No	No	No	No	No	No	No	No	No

Show 10 | Displaying 1 out of 1 rows.

SYMP TOM ONSET 05/31/2020

EXTEND ISOLATION TO 09/01/2021

Previous 1 Next

Figure 119: The record will be moved to appropriate line list

3) The monitoree's **Extend Isolation To** date is visible on the dashboard. This monitoree is not eligible to appear on the Records Requiring Review line list at least until this date has passed and a recovery definition is met.

Records Requiring Review 21 | Non-Reporting 2 | Reporting 0 | Closed 7 | Transferred In 0 | Transferred Out 0 | All Cases 30

Cases who preliminarily meet the recovery definition and require review. You are currently in the is

Jurisdiction: USA | Exact | Assigned User

Search: UG | Advanced Filter | Bulk Actions

Monitoree	Jurisdiction	Assigned User	State/Local ID	Date of Birth	Phone Number	Extended Isolation To	First Positive Lab	Symptom Onset	Monitoring Plan	Latest Report
Example,	State 3			01/01/2000				09/22/2021	None	11/18/2021 10:50 EST

Figure 120: The Extend Isolation To date is visible on the dashboard

## 10.5 Individual Monitoree Record Functions (All Dashboards)

This section covers the ways in which **Public Health users, Public Health Enrollers, Contact Tracers, and Super Users** can manage monitoree records, not specific to either the Exposure or Isolation workflows.

### 10.5.1 How to Transfer a Monitoree Record

**NOTE:** **Contact Tracers** do not have the ability to transfer monitoree records.

A public health user can transfer a monitoree **to another jurisdiction that uses Sara Alert™** by updating the jurisdiction of the monitoree's record. If the public health user does not have access to the updated jurisdiction (e.g., in the case of a transfer to another state), the user will no longer have access to details of that monitoree's record.

If a jurisdiction needs to keep complete record information to comply with record retention policies, the record should be exported prior to transfer (see export instructions on **page 133**).

1) After selecting the record of interest, **clear the “Assigned Jurisdiction” and begin to type the transfer jurisdiction name**. A list of jurisdictions that match the search parameters will appear. Select the appropriate jurisdiction. Only jurisdictions who are using Sara Alert™ appear in the drop-down. If the transfer jurisdiction is not listed, the monitoree record cannot be transferred using this functionality and will need to be transferred to the destination jurisdiction manually (e.g., encrypted email, phone call, etc.)

The screenshot shows the 'Monitoring Actions' form. The 'ASSIGNED JURISDICTION' dropdown is open, displaying a list of jurisdictions: 'USA, State 2', 'USA, State 2, County 3', and 'USA, State 2, County 4'. An orange arrow points to the dropdown menu. Other fields include 'MONITORING STATUS' (Not Monitoring), 'EXPOSURE RISK ASSESSMENT' (empty), 'MONITORING PLAN' (Daily active monitoring), 'CASE STATUS' (Unknown), 'LATEST PUBLIC HEALTH ACTION' (None), and 'ASSIGNED USER' (2204) with a 'Change User' button.

**Figure 121: Start to type the name of the jurisdiction to view list of available jurisdictions**

2) Click “**Change Jurisdiction.**”

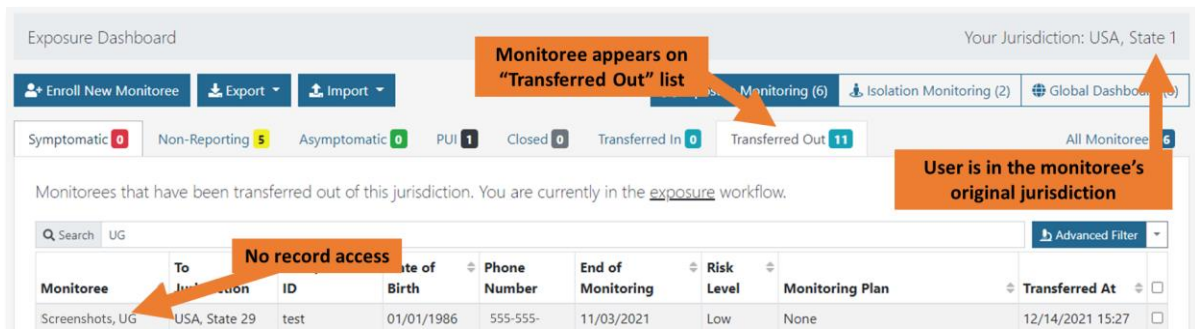
The screenshot shows the 'Monitoring Actions' form with the 'ASSIGNED JURISDICTION' dropdown set to 'USA, State 2, County 3'. An orange arrow points to the 'Change Jurisdiction' button. Other fields are the same as in Figure 121.

**Figure 122: Change the jurisdiction to the new "Assigned Jurisdiction"**

3) Add comments to document the reason for transferring the monitoree to another jurisdiction (i.e., moved, changed address, etc.) and click **“Submit.”** These comments will become part of the record history.

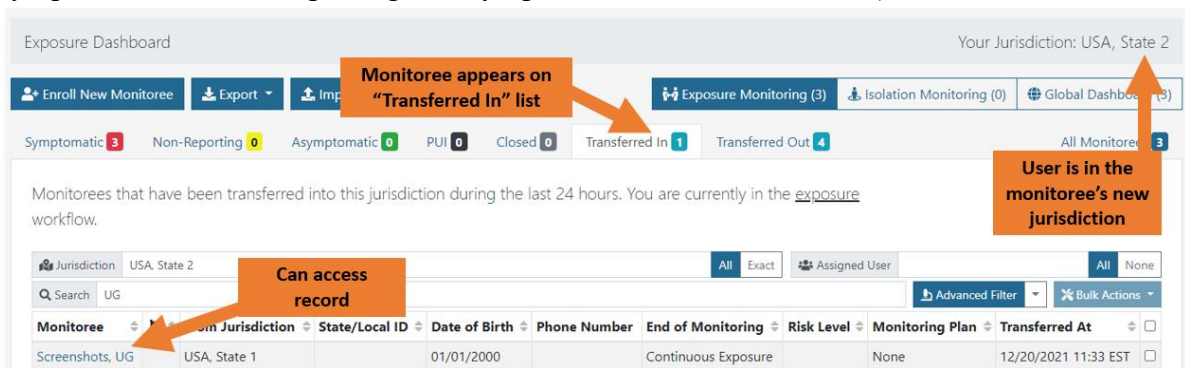
- The record will appear on the new jurisdiction’s **“Transferred In”** line list for 24 hours after the user clicks **“Submit.”** The new jurisdiction is now able to modify the record.
- After transferring a record out of user’s jurisdiction, the record will only be accessible by users in the new jurisdiction. Data from a limited set of fields for each transferred record will appear on the **“Transferred Out”** line list until the record is purged from the system, but the record will not be able to be accessed. If a record was transferred in error, the receiving jurisdiction should be contacted.

**NOTE:** If a record is transferred by mistake, you may need to contact a user at the new jurisdiction to have the record transferred back.



**Figure 123:** The monitoree now appears in the “Transferred Out” tab (Note that the monitoree’s name is no longer clickable).

4) The monitoree’s record will appear in the receiving jurisdiction’s **“Transferred In”** line list for 24 hours. The record will also appear on the appropriate monitoring line list (e.g., “Symptomatic,” “Non-Reporting,” “Asymptomatic,” “PUI,” “Closed”).



**Figure 124:** The monitoree has moved to the new jurisdiction.

## 10.5.2 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

Flagged for Follow-up  
Lost to Follow-up: example for the user guide

Peter Airport **HoH**

Assigned Jurisdiction: --  
Assigned User: --

**IDENTIFICATION** [Edit](#)

DOB: 01/01/2000  
Age: 21  
Language: --  
Sara Alert ID: 36483  
State/Local ID: 12345  
CDC ID: --  
NNDSS ID: --

Birth Sex: --  
Gender Identity: Male (Identifies as male)  
Sexual Orientation: --  
Race: White  
Ethnicity: --  
Nationality: --

**CONTACT INFORMATION** [Edit](#)

**PRIMARY CONTACT** ⓘ  
Contact Relationship: Self  
Phone: --  
Preferred Contact Time: Afternoon  
Telephone Type: Landline  
Reporting Method: Unknown

**ALTERNATE CONTACT** ⓘ  
Contact Name: Father Airport  
Contact Relationship: Parent/Guardian  
Phone: --  
Preferred Contact Time: --  
Primary Telephone Type: --  
Email: --  
Preferred Contact Method: Unknown

▼ Show address, travel, exposure, and case information

This monitoree is responsible for handling the reporting of the following other monitorees:

**Figure 125: Open the monitoree's record and expand the Monitoree Details section**

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

**POTENTIAL EXPOSURE INFORMATION** [Edit](#)

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

**Figure 126: 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

**Figure 127: 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 128: 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 129: 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 select “Next” and “Finish” to save your updates.

**Figure 130: Click the “edit” icon to update an existing Cohort entry**

7) To delete a Common Exposure Cohort, click the “Delete” icon and select “OK”. You will not be required to enter a reason for deletion. Remember to select “Next” and “Finish” to save your updates.

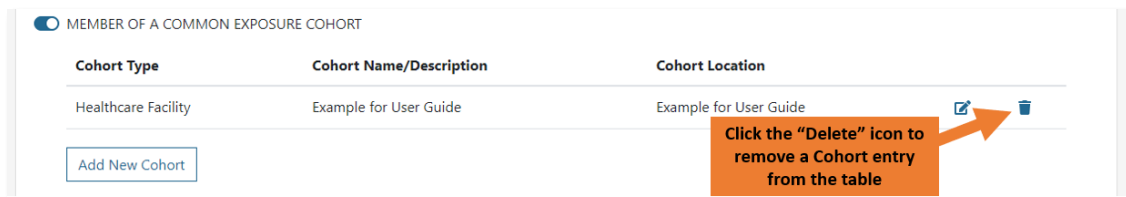


Figure 131: Click the “delete” icon to remove an existing Cohort entry

### 10.5.3 How to Log a Manual Contact Attempt

For monitorees that require follow-up, users can now easily document manual contact attempts (e.g., phone calls or home visits).

**NOTE:** If contact cannot be established or reestablished, users should follow local protocols for when to close a record due to loss to follow-up. See **page 113** for details on how to close a record.

1) Under “Reports” Select “Log Manual Contact Attempt.”

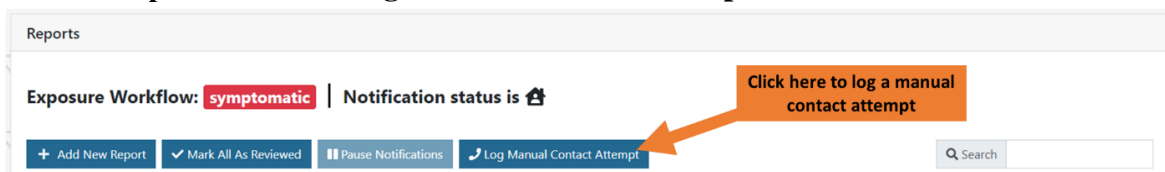


Figure 132: Select “Log Manual Contact Attempt.”

2) Select if contact attempt was successful or unsuccessful and click “Submit.”

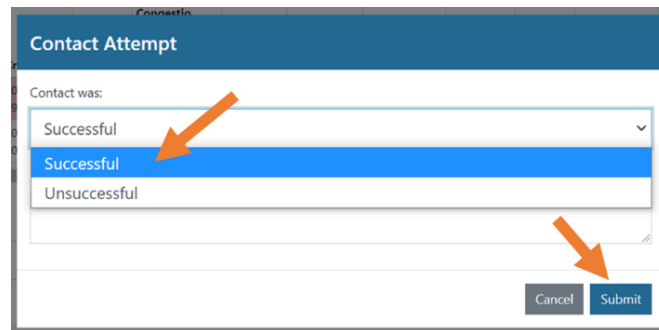


Figure 133: Document the results of the attempt.

3) The contact attempt and outcome will be logged in the History section

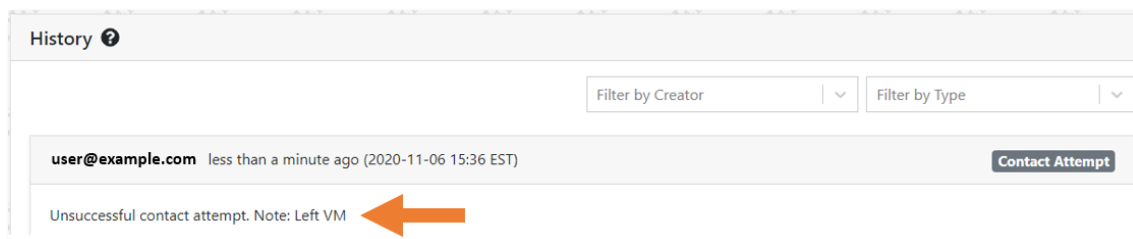


Figure 134: The outcome is logged in the History.



## 10.5.4 How to Add a Daily Report to a Monitoree Record

A user may need to add a daily assessment report on behalf of a monitoree.

1) After selecting the monitoree's record of interest, select “**Add New Report**” to enter a new report on behalf of monitoree.

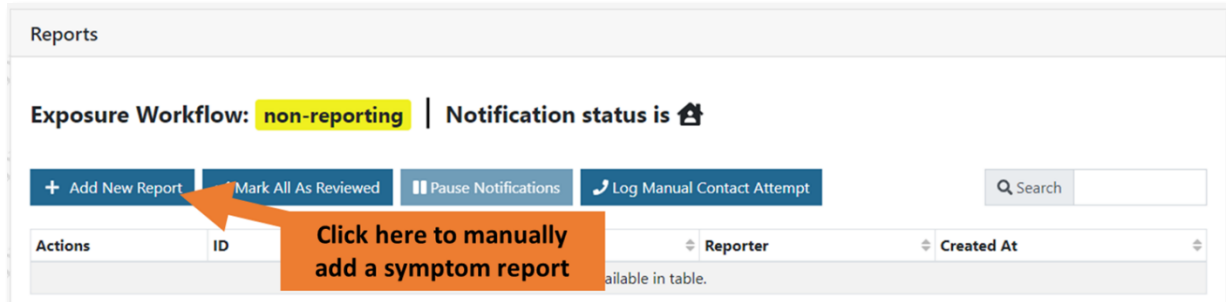


Figure 135: Users may submit report on behalf of the monitoree.

2) The “Symptom Report for Date” will auto-populate with the current date and time but may be edited to a past date/time. Complete the Daily Report and click “**Submit**.” **NOTE:** The symptoms assessed on the daily self-report are subject to change based on latest CDC and CSTE guidance.

Figure 136: Complete the daily report of symptoms

3) The username of who submitted the report will be logged in the “Reporter” column. Note that the record’s status has changed to “Symptomatic.”

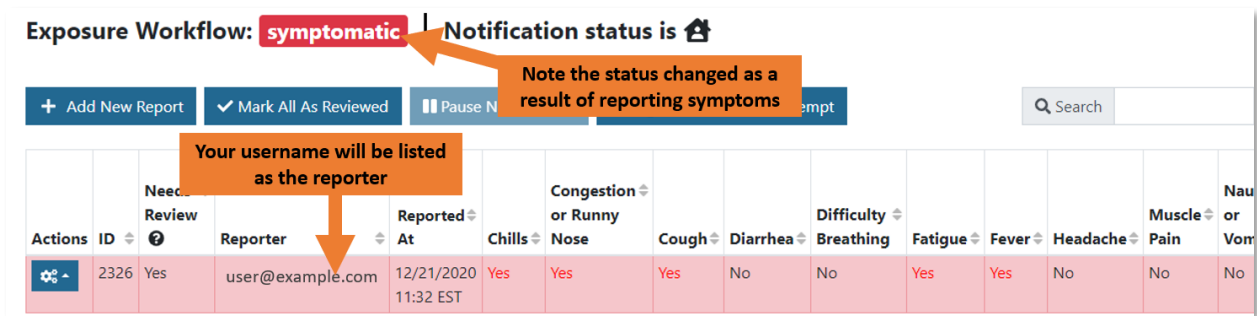


Figure 137: A public health user may manually add a report

If using the system in a small browser window or on a small screen, a user may need to side scroll to view the full list of symptoms. A scroll bar will appear if the system is unable to show the full list of symptoms at once:

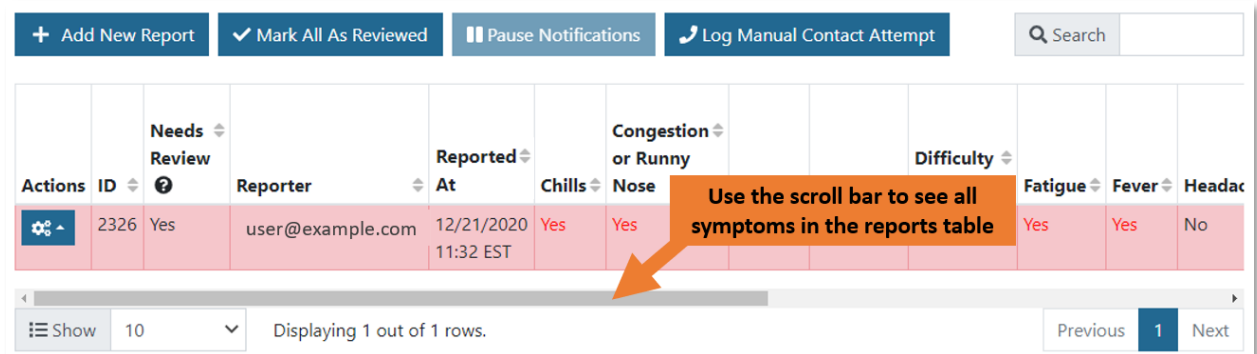


Figure 138: Use the scroll bar to see the full list of symptoms

## 10.5.5 How to Modify an Existing Report

A public health user can modify a monitoree report if necessary (e.g., to fix a data entry error).

1) Find the report of interest and click the actions button to open the drop-down menu. Select “Edit” to modify the report.

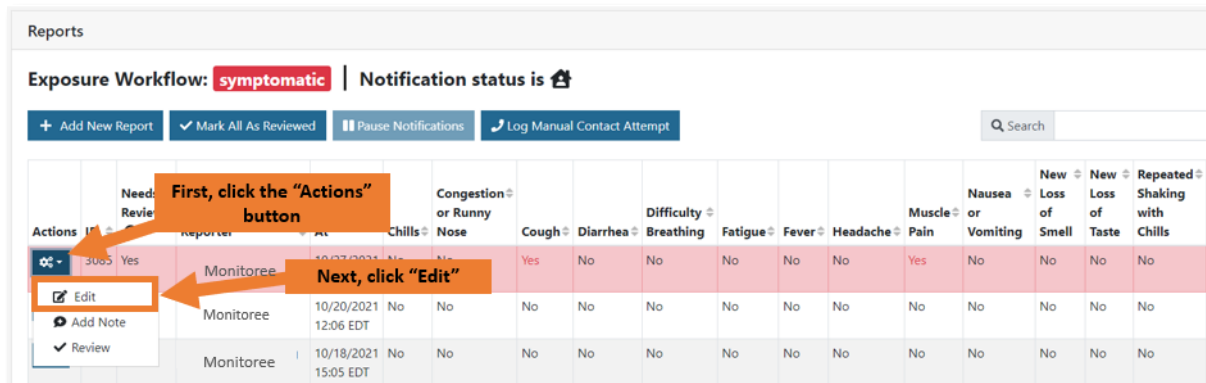


Figure 139: A public health user may modify an existing report

2) You can change the report date and time as well as the content. Update the daily report and click “**Submit.**” **NOTE:** The symptoms displayed in the daily self-report are subject to change based on latest guidance.

Figure 140: Update the daily report.

3) Note the changes to reported symptoms in the “**Reports**” table.

Reports

Exposure Workflow: **symptomatic** | Notification status is

+ Add New Report | ✓ Mark All As Reviewed | || Pause Notifications | Log Manual Contact Attempt

Search

Actions	ID	Needs Review	Reporter	Reported At	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
	3085	Yes	test@email.com	10/27/2021 09:55 EDT	No	No	No	No	No	Yes	Yes	No	No	No	No	No	No
	3076	No	Monitoree	10/20/2021 12:06 EDT	No	No	No	No	No	No	No	No	No	No	No	No	No
	3069	No	Monitoree	10/18/2021 15:05 EDT	No	No	No	No	No	No	No	No	No	No	No	No	No

Figure 141: The report has been updated.

4) The history section will document that an existing subject report was updated by a user and what change was made.

test@email.com 1 minutes ago (10/27/2021 12:07 EDT) **Report Updated**

User edited an existing report (ID: 3085). Reported at update: 10/27/2021 10:59 CDT to 10/27/2021 08:55 CDT. Symptom updates: Cough (“Yes” to “No”), Fever (“No” to “Yes”), Muscle Pain (“Yes” to “No”), Fatigue (“No” to “Yes”). Reporter update: (“Monitoree” to “test@email.com”).

Figure 142: Changes are documented in History.

## 10.5.6 How to Add a Note About a Specific Report

A user can add a note for a specific report.

1) Click the actions button for the report. Then click “Add Note.”

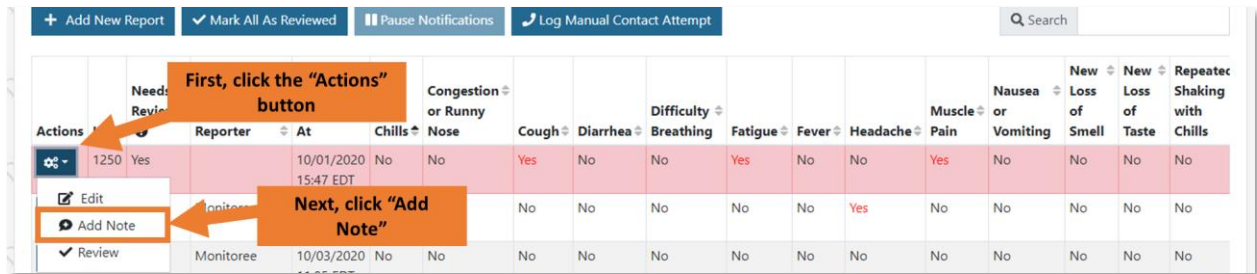


Figure 143: Add a note to a report.

2) A Dialog box will appear. Input your note and click “Submit.”

**Add Note To Report**

Please enter your note about the assessment (ID: 811) below.

Data Entry Error. Updated with correct symptoms

Cancel Submit

Figure 144: Enter your note into the dialog box.

3) Report notes, report updates, and manually entered reports are all logged in the “History” section.

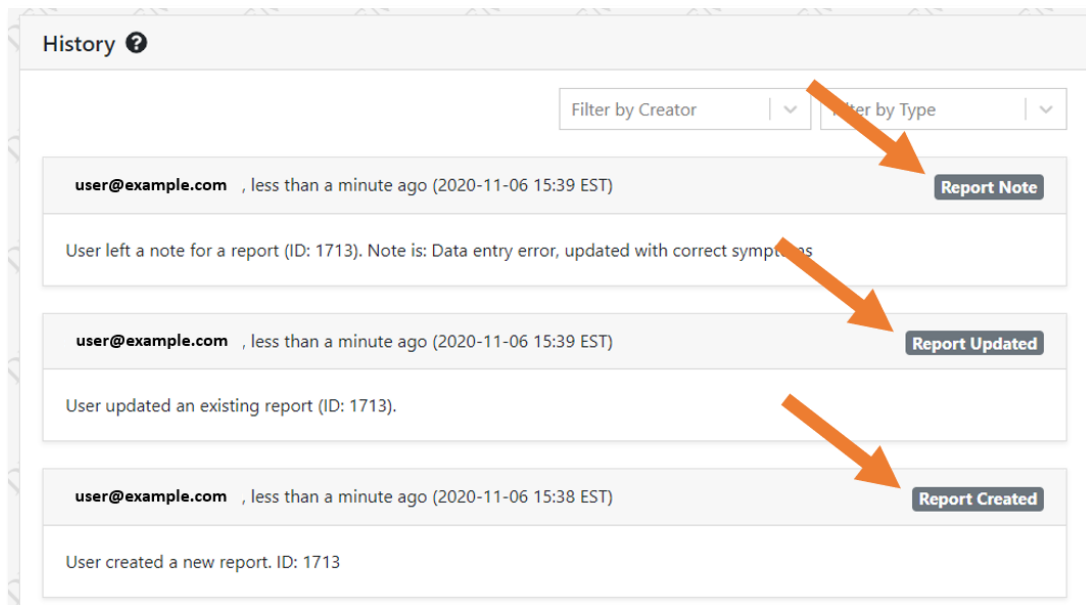


Figure 145: The “History” section tracks these types of updates to a monitoree’s record.

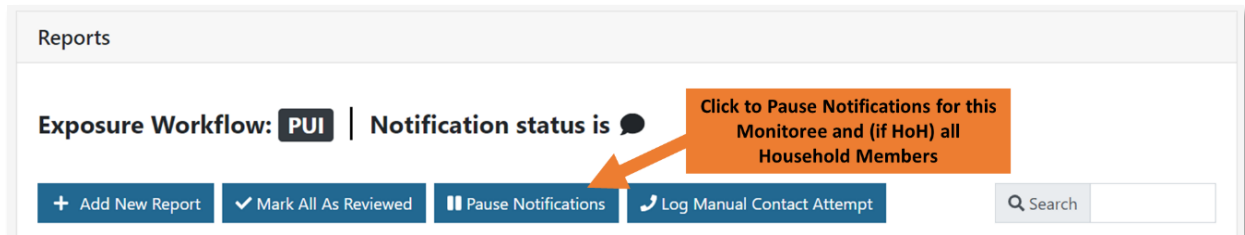
## 10.5.7 How to Pause or Resume Notifications for a Monitoree

Users can use the “Pause Notifications” button to pause notifications for:

- A single monitoree who is not in a household (self-reporter)
- An entire household (by pausing notifications for the Head of Household)

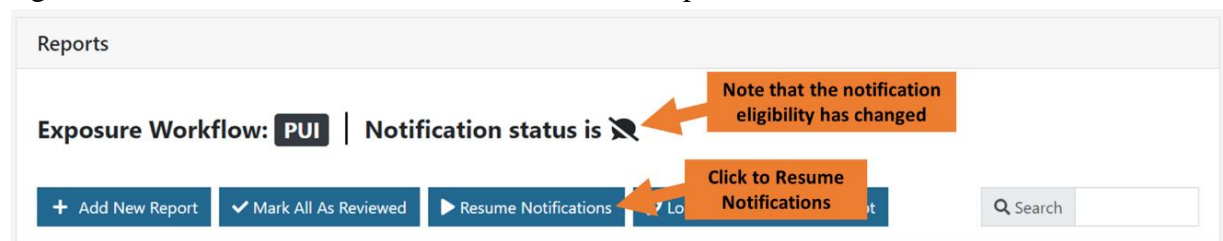
The “Pause/Resume” notification button is currently disabled on closed records or household member records who are not the HoH. See **page 30** for more details.

1) Open the monitoree or Head of Household’s record. In the reports section, click “Pause Notifications” to pause notifications for that monitoree or household (if applicable).



**Figure 146: Click the “Pause Notification” button.**

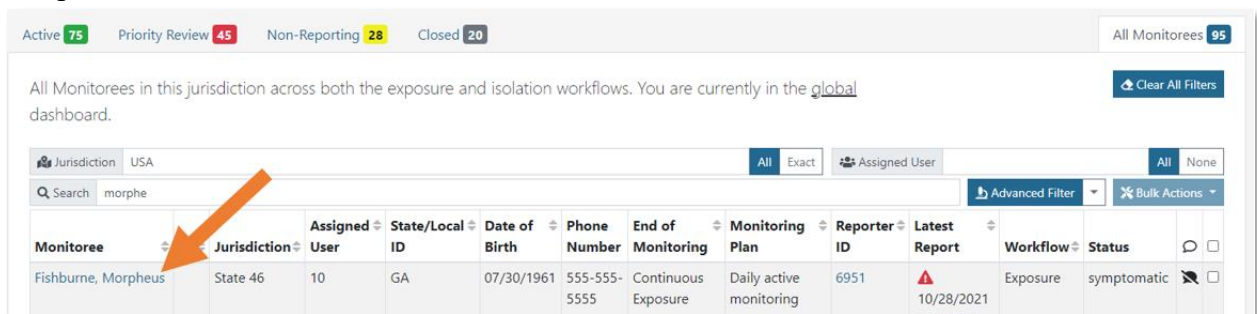
2) If paused, users can click “Resume Notifications” to resume notifications. If otherwise eligible, a notification will be sent at the monitoree’s preferred contact time.



**Figure 147: Click “Resume Notifications” to resume.**

## 10.5.8 How to Add a Lab Result

1) Open the monitoree’s record.



**Figure 148: Open the monitoree’s record.**

2) To add laboratory test results, click “**Add New Result**” in the Lab Results section.

**Figure 149: Add laboratory test results.**

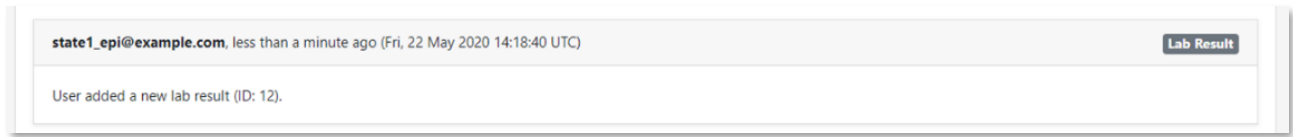
3) Update fields with available data. You will need to input information into a minimum of one Lab Result field to add an entry.

**Figure 150: Add Lab Result information and click Create.**

4) Edit an existing lab result by click that lab result’s Actions button and then clicking “Edit.”

**Figure 151: You can edit an existing lab result by clicking Actions, then Edit.**

5) Lab result updates, along with the user who made the changes, are documented in the History section.

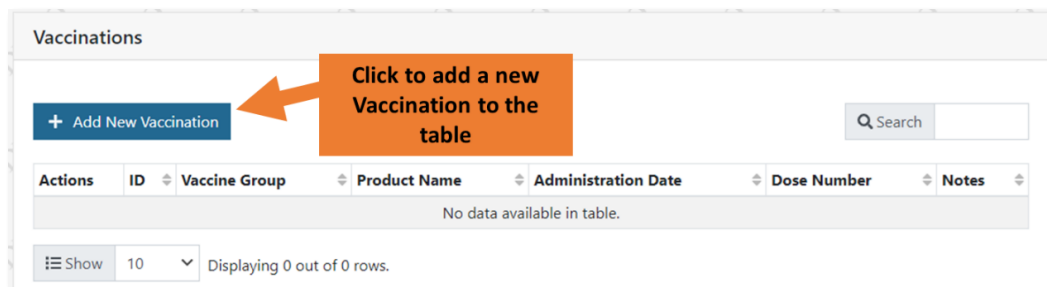


**Figure 152: The History section automatically records lab result changes.**

## 10.5.9 How to Add a New Vaccination

Users can document vaccinations that a monitoree has received related to the disease for which they are being monitored.

1) Open the monitoree's record, scroll to the "Vaccinations" section, and click "Add New Vaccination."



**Figure 153: Click "Add New Vaccination."**

2) The "Add New Vaccination" window will appear. Choose the Vaccine Group, Product Name, Administration Date, and Dose Number. You can also add additional information to the Notes section. You must, at a minimum, indicate a Vaccine Group and Product Name. Once you have added all relevant information, click "Create."

 A screenshot of the 'Add New Vaccination' form. It contains several input fields: 'Vaccine Group\*' (dropdown menu with 'COVID-19' selected), 'Product Name\*' (dropdown menu with 'Moderna COVID-19 Vaccine (Non-US tradename: Spikevax)' selected), 'Administration Date' (calendar icon with '08/30/2021' selected), and 'Dose Number' (dropdown menu with '1' selected). There is a 'Notes' text area with the placeholder text 'Example for User Guide'. At the bottom right, there are 'Cancel' and 'Create' buttons. An orange callout box with an arrow points to the 'Create' button, containing the text 'Add information to the form and click "Create"'.

**Figure 154: Fill out the form and click "Create."**

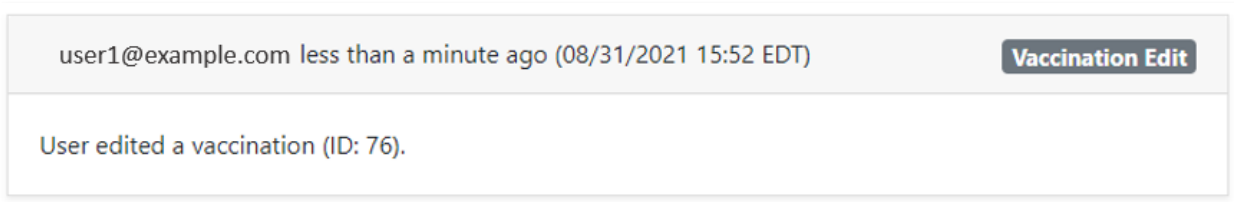


- 3) Edit an existing vaccination by clicking that row's Actions button and then clicking "Edit."



**Figure 155: You can edit an existing vaccination by clicking Actions, then Edit.**

- 4) Vaccination updates, along with the user who made the changes, are automatically documented in the History section.

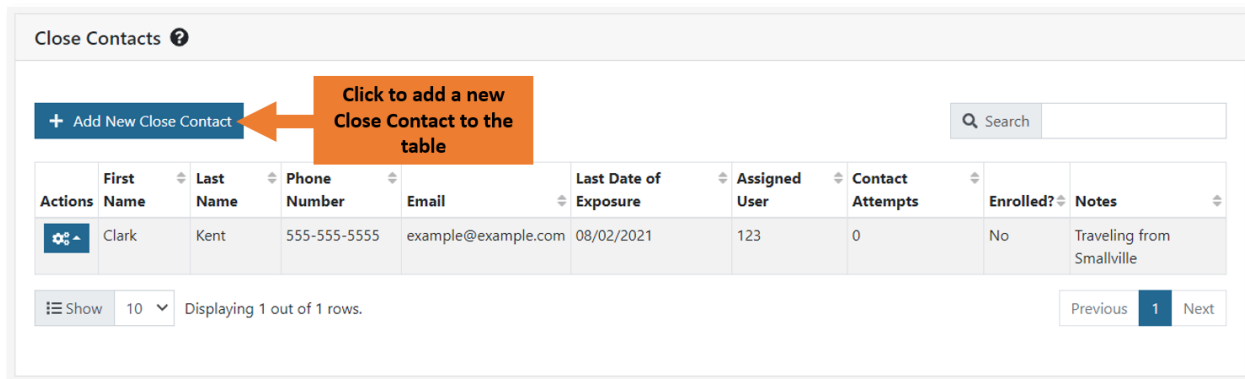


**Figure 156: The History section automatically records changes made to vaccinations.**

### 10.5.10 How to Add a New Close Contact

Users can add a list of close contacts associated with a specific monitoree. Close Contacts can later be enrolled in Sara Alert as monitorees if they require public health monitoring.

- 1) Open the monitoree's record, scroll to the "Close Contacts" section, and click "Add New Close Contact."



**Figure 157: Click "Add New Close Contact."**



2) Add any information you have collected about the close contact and click **“Create.”** You must enter at a minimum:

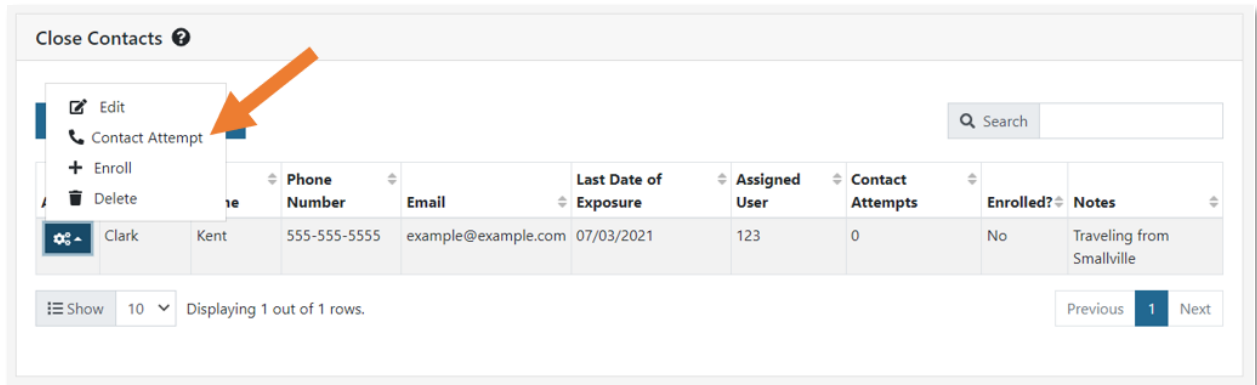
- At least one name (first name **OR** last name); AND
- At least one piece of contact information (phone number **OR** email address)

**Figure 158: Add Close Contact Information.**

3) To edit a close contact, click the Actions button and select **“Edit”**

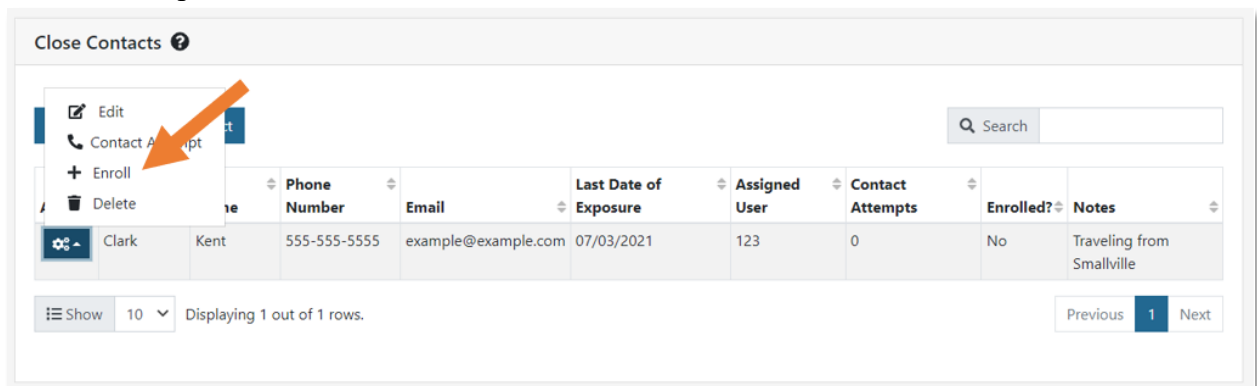
**Figure 159: Click “Edit” to edit a close contact’s information.**

4) Click the Actions button and select “**Contact Attempt**” to document an attempt to contact one of the monitoree’s close contacts. This will increase the number in the “Contact Attempts” column.



**Figure 160: Document a Contact Attempt.**

5) Only **Public Health Enrollers**, **Contact Tracers**, and **Super Users** can enroll Close Contacts as monitorees in Sara Alert. See **page 58** for more information. **Public Health users** will not see the “Enroll” option listed.



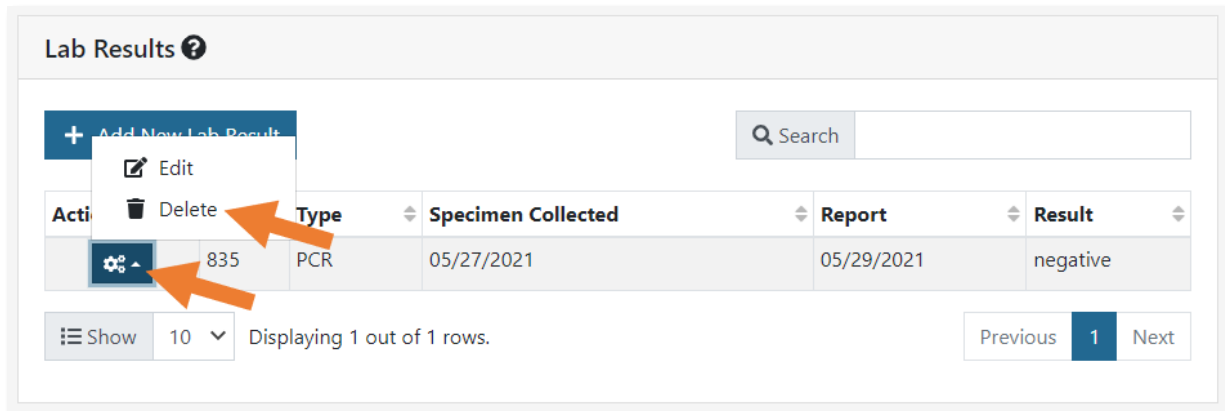
**Figure 161: Some users can enroll Close Contacts into Sara Alert.**

### 10.5.11 How to Delete a Lab Result, Vaccination, or Close Contact

Users can delete an existing Lab Result, Vaccination, or Close Contact table entry by clicking the Actions button, selecting “delete,” and choosing a reason for deletion. The deleted values will be captured in the History section as a comment.

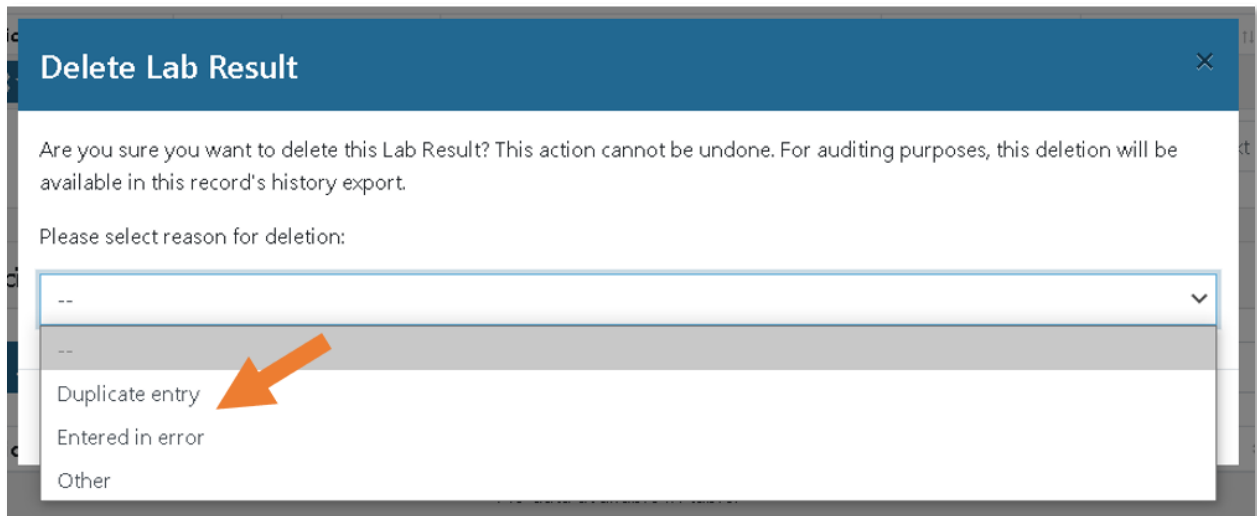
**NOTE:** Only values populated in the entry upon deletion will be captured in the History. For example, if a Close Contact does not have phone number populated when deleted, no value will be captured in History for that field.

1) For lab results, vaccinations, and close contacts, click the “Actions” button, then click “Delete.”



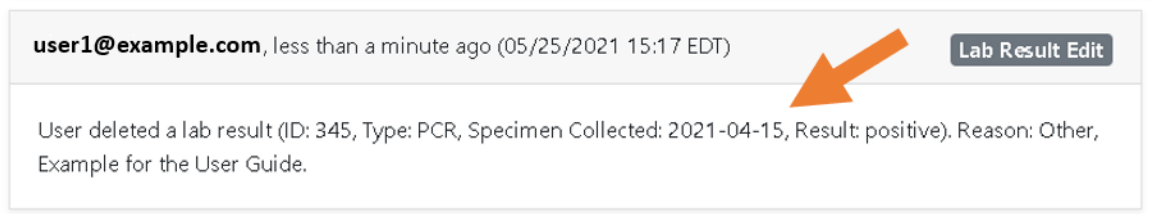
**Figure 162:** For lab results and vaccinations, click the “Actions” button, then click “Delete.”

2) Select a reason for deletion. If “Other” is selected, additional information regarding the reason for deletion may be added in the notes section.



**Figure 163:** Select a reason for deletion.

3) The deleted values and reason for deletion will be captured in the History section and will appear in any exports that include record Histories.



**Figure 164:** The deleted entry and reason for deletion are captured in the History section.

### 10.5.12 How to Add Comments to a Record

Users can add comments to “History” section to document information not captured elsewhere. Click “**Add Comment.**” This section tracks any changes made to monitoring and report data elements. The username of the comment submitter and date of the submission is displayed.

The screenshot shows a list of history entries. The first entry is from 'user@example.com' (days ago (2020-10-29 15:18 EDT)) with a 'Monitoring Change' tag, stating 'System changed symptom onset date from blank to 10/29/2020 because a report meeting the symptomatic logic was created or updated.' The second entry is from 'user@example.com' (3 months ago (2020-07-16 15:54 EDT)) with an 'Enrollment' tag, stating 'User enrolled monitoree.' Below the list is a pagination bar with 'First', 'Previous', '1', '2', '3' (selected), 'Next', and 'Last'. At the bottom is an 'Add Comment' section with a text input field containing 'enter comment here...' and an 'Add Comment' button. Two orange arrows point to the input field and the button.

**Figure 165: You can add a comment to a monitoree’s History.**

### 10.5.13 How to Edit or Delete Comments in a Record

Users can edit or delete comments they themselves added to the History using the “Add Comment” button. Users cannot edit or delete comments added by the system or by other users. All edits and deleted comments can be viewed through the History export.

- 1) You can edit your own History comments by selecting the gray “edit” icon.

The screenshot shows a comment entry from 'user@example.com' (less than a minute ago (05/25/2021 17:03 EDT)) with the text 'Example for the User Guide'. To the right of the text is a gray 'edit' icon (pencil) and a trash can icon. An orange box with the text 'Click to edit comment' and an arrow points to the 'edit' icon. A 'Comment' button is also visible.

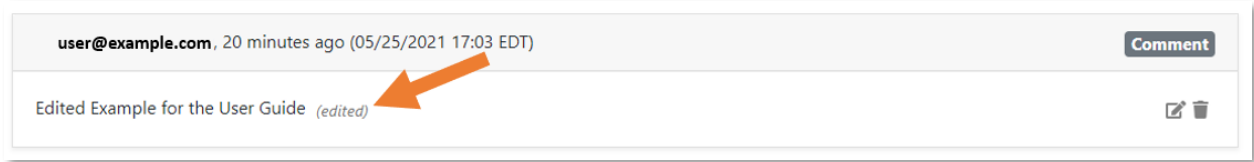
**Figure 166: Select the “edit” icon to update your History comment.**

- 2) Edit the comment directly where it appears in the History section and click “Update.”

The screenshot shows the same comment entry in edit mode. The text 'Example for the User Guide' has been changed to 'Edited Example for the User Guide'. The 'edit' icon is no longer present. At the bottom right, there is a character count '9966 characters remaining' and two buttons: 'Cancel' and 'Update'. Two orange arrows point to the text input field and the 'Update' button.

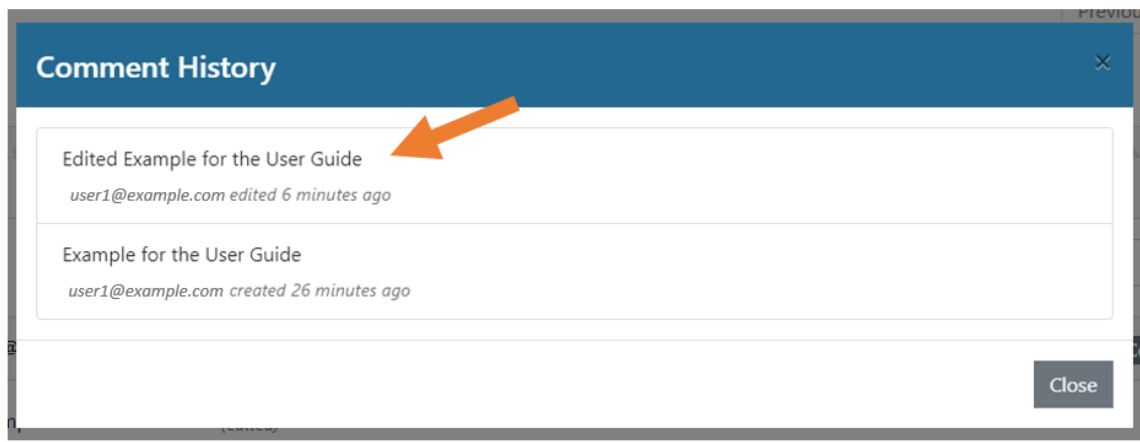
**Figure 167: After completing changes, click “Update.”**

- 3) History comments that have been edited are labeled with clickable “(edited)” text. You can click “(edited)” to see a list of all edits that have been made to the comment.



**Figure 168: Clicking “(edited)” shows all edits made to the comment.**

- 4) The most recent edit is listed at the top.



**Figure 169: The most recent edit is listed at the top.**

- 5) You can see edits to all comments in the “Edit Histories” tab of any export format that includes record Histories.

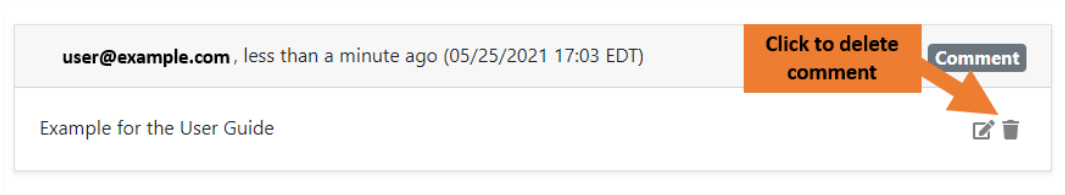
**If a comment is edited, it will be assigned a new Comment ID for each edit and the original comment’s ID will appear in the “Original Comment” column**

	A	B	C	D	E	F	G	H	I	J
	Patient	Comment	Original		Created By	History	Created At	Updated At	Deleted By	Delete Reason
1	ID	ID	Comment	Comment		Type				
16	1038	101283	101283	The quick brown fox jumps over the lazy dog	abeede@mitre.org	Comment	2021-05-26 17:11:06 UTC	2021-05-26 17:20:35 UTC	abeede@mitre.org	Other: Entered for demonst
17	1038	101284	101283	Sphinx of black quartz, judge my vow.	abeede@mitre.org	Comment	2021-05-26 17:18:35 UTC	2021-05-26 17:20:35 UTC	abeede@mitre.org	Other: Entered for demonst

**Figure 170: Users can see all edits to a comment, as well as the original comment, in the “Edit Histories” tab of the export.**

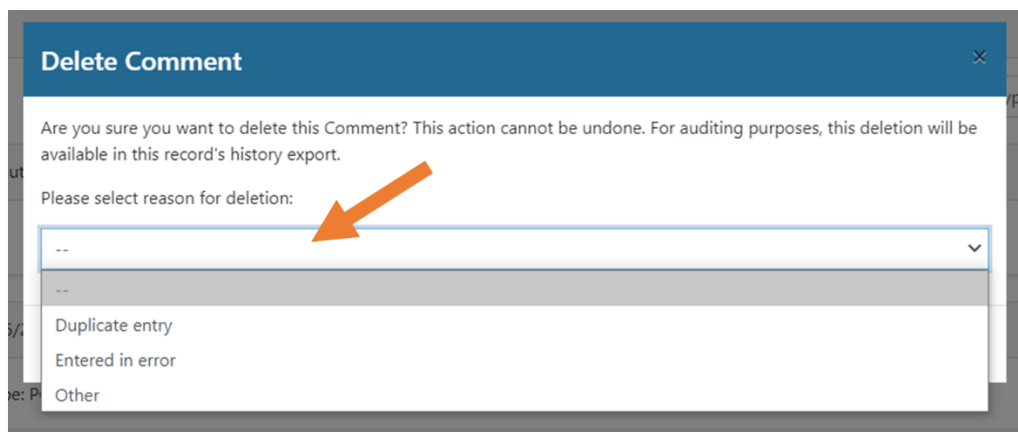
Users may also delete comments they created themselves. Once the user chooses a reason for deletion, the comment will be removed from the History section. Deleting a comment cannot be undone, but the full comment history, time of deletion, user completing the deletion, and the reason for deletion can be viewed in the History export.

- 1) You can delete a comment you created by clicking the “trash can” icon.



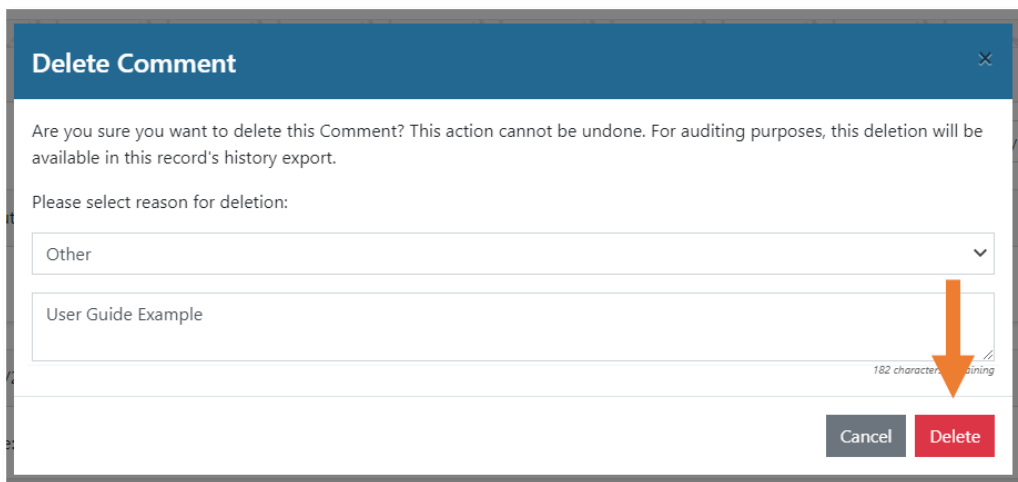
**Figure 171: Click the gray “delete” icon.**

- 2) Select a reason for deletion. If “Other” is selected, you can add additional information about why you deleted the comment.



**Figure 172: Select a reason for deletion.**

- 3) Click “Delete” to permanently remove the comment from the monitoree’s record.



**Figure 173: Click “Delete.”**

4) The deleted comment will be captured in any export format that includes the record's History, with the time of deletion, the username initiating the deletion, and the reason for deletion.

If a comment was deleted, the “Updated At” column will show the time of deletion, “Deleted By” will show the user’s name, and “Delete Reason” will show the reason

	A	B	C	D	E	F	G		I	J	
	Patient ID	Comment	Original Comment	Comment	Created By	History Type	Created At		Updated At	Deleted By	Delete Reason
1	ID	ID	Comment	Comment							
16	1038	101283	101283	The quick brown fox jumps over the lazy dog.	abeede@mitre.org	Comment	2021-05-26 17:11:06 UTC		2021-05-26 17:20:35 UTC	abeede@mitre.org	Other: Entered for demonstration purposes.
17	1038	101284	101283	Sphinx of black quartz, judge my vow.	abeede@mitre.org	Comment	2021-05-26 17:18:35 UTC		2021-05-26 17:20:35 UTC	abeede@mitre.org	Other: Entered for demonstration purposes.

Figure 174: Deleted comments are captured in the History export.

### 10.5.14 How to Filter Record History

1) Click the "Filter by Type" field to filter based on the type of action that was recorded, and the "Filter by Creator" field to filter based on the user that initiated the action. Filter fields can be used separately or together.

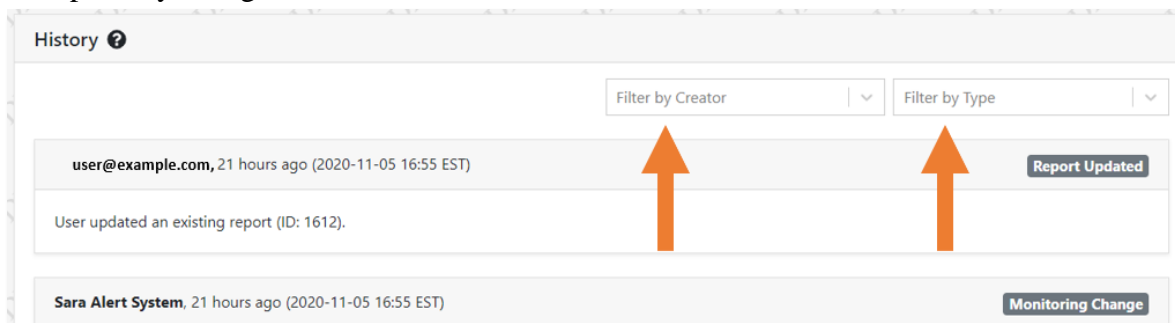


Figure 175: Filter history based on type and/or creator.

2) The five most recent changes are displayed on the first page. View additional changes by clicking through the numbered pages below the last record displayed.



Figure 176: Click the numbered pages below the last record to see later historical changes.

### 10.5.15 Move Monitree Records Based on Case Status to a Different Workflow

An active record can be moved between the exposure and isolation workflows based on case status. This workflow is intended to move exposed individuals to the appropriate workflow after a case is ruled in or out based on the investigation.

**NOTE:** Updating “Case Status” for a record on the Closed line list will not move the record since it is not under active monitoring.

1) After investigation of a symptomatic exposed individual, select appropriate “Case Status.”

The screenshot shows the 'Monitoring Actions' form. The 'CASE STATUS' dropdown is open, showing 'Confirmed' as the selected option. Other options visible are 'Probable' and 'Suspect'. An orange arrow points to the 'Confirmed' option.

Figure 177: Select case status.

#### 10.5.15.1 Case Status is Confirmed or Probable

- Select “**Confirmed**” or “**Probable**.”
- Select if you would like to continue monitoring the case in Sara Alert™ or not. This should be based on local response protocols.
  - Selecting “**End Monitoring**” will move the record to the Closed line list with “Meets Case Definition” as the reason.
  - Selecting “**Continue Monitoring in Isolation Workflow**” will move the record to the Isolation workflow. The record will appear in either the “Non-Reporting” or “Reporting” line lists, depending on the monitoree’s reporting status.

The screenshot shows the 'Case Status' dialog box. It prompts the user to 'Please select what you would like to do:'. Two options are listed: 'End Monitoring' and 'Continue Monitoring in Isolation Workflow'. The 'Continue Monitoring in Isolation Workflow' option is highlighted in blue, and an orange arrow points to it.

Figure 178: Choose what to do with the record.



### 10.5.15.2 Case Status is Suspect, Not a Case, or Unknown

- Select “Suspect,” “Not a Case,” or “Unknown”
- The record will be retained or returned to the exposure monitoring workflow to continue monitoring for the remainder of the monitoring period or until meets confirmed or probable case status.

Figure 179: The case will move back to an active monitoring list in the exposure workflow.

### 10.5.16 Manually Close Records for Monitorees Who No Longer Require Follow-Up

If a monitoree should no longer be monitored by public health (e.g., due to the ending of the monitoring period, lost to-of follow-up, recovery, duplicate record, deceased, etc), a user can close the record. This will move the record off of the Active Monitoring line lists in the respective workflow (exposure or isolation) and onto the Closed line list; the system will also stop sending automated daily reports unless the monitoree is a designated Head of Household and has reporting household members that are still eligible to receive daily reports (see **page 162**).

All records in the Isolation Workflow must be manually closed after public health has determined that the individual can stop being monitored by Sara Alert™. In the Exposure Workflow, records that meet specific criteria are automatically closed by the system; see **page 41** for more information about when records are automatically closed.

1) After selecting the record of interest, update “**Monitoring Status**” to “**Not Monitoring**” to close the record.

Figure 180: Change monitoring status.

## 2) Select the appropriate options:

- **If the monitoree is in a Household**, the user will be prompted to select the records that the change should be applied to (e.g., the current record only or selected household members). See page 128 for more details on applying changes to Household members.
- Document the reason for changing the monitoring status and any additional details. See page 41 for a description of available reasons for closure.
- **If the monitoree is in the Isolation workflow and has Household members monitored in Sara Alert who are no longer being exposed to the monitoree:** A user may select to update the Last Date of Monitoring for all reporting Household members who have Continuous Exposure turned on and are being monitored in the Exposure Workflow. See page 131 for more information on managing Households where multiple exposure monitorees are exposed to a case.

**Monitoring Status**

Are you sure you want to change monitoring status to "Not Monitoring"? This will move the selected record(s) to the Closed line list and turn Continuous Exposure OFF.

Apply this change to:

☒ This monitoree only  
☐ This monitoree and selected household members

Please select reason for status change:

Please include any additional details:

Would you like to update the *Last Date of Exposure* for all household members who have Continuous Exposure turned ON and are being monitored in the Exposure Workflow?

☒ No, household members still have continuous exposure to another case  
☐ Yes, household members are no longer being exposed to a case

Cancel Submit

Figure 181: Document reason for monitoring status change

## 3) The change is documented in the record's history.

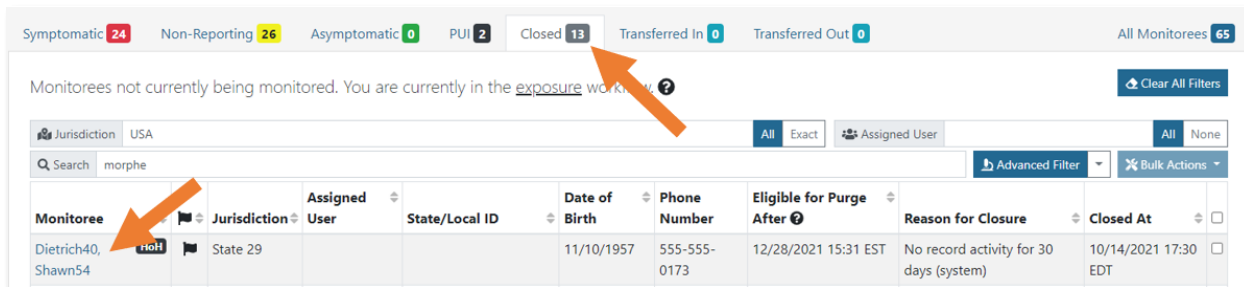
**History**

state1\_epi@example.com, less than a minute ago (2020-03-26 17:53:13 UTC) **Monitoring Change**

User changed monitoring status to "Not Monitoring". Reason: Lost to follow-up during monitoring period

Figure 182: Comments are added to record history

4) The monitoree will then move to the “**Closed**” line list. A record can be moved back to the Active Monitoring line lists by changing the monitoring status back to “**Actively Monitoring**.”



Monitorees not currently being monitored. You are currently in the [exposure work](#) view. [Clear All Filters](#)

Jurisdiction: USA [All](#) [Exact](#) [Assigned User](#) [All](#) [None](#)

Search: morphe [Advanced Filter](#) [Bulk Actions](#)

Monitoree	Jurisdiction	Assigned User	State/Local ID	Date of Birth	Phone Number	Eligible for Purge After	Reason for Closure	Closed At	
Dietrich40, Shawn54	State 29			11/10/1957	555-555-0173	12/28/2021 15:31 EST	No record activity for 30 days (system)	10/14/2021 17:30 EDT	<input type="checkbox"/>

Figure 183: The monitoree now appears in the “Closed” line list.

### 10.5.16.1 How to Manage Duplicate Records

Duplicate records cannot be “deleted” in Sara Alert. To manage a duplicate record

- Manually close the duplicate record using the steps indicated above
- Select “Duplicate” from the “Please select reason for status change” drop-down menu
- After a set period (configured for the disease being monitored), the duplicate record will be marked for purge. For COVID-19, this period is 10 days (see [page 9](#) for more information about record purge).

# 11 HOW TO MANAGE REPORTING GROUPS (“HOUSEHOLDS”) IN SARA ALERT

Sara Alert™ allows a group of monitorees to, if they so choose, **report symptoms as a single household unit**. If they choose to do so, the system will link their records and contact only the designated Head of Household (HoH) who will report daily symptom information on behalf of household members.

**NOTE:** If the Head of Household record is closed for any reason, the Head of Household will continue to receive automated daily reports for all remaining eligible household members. If the Head of Household no longer wishes to report on behalf of linked household members, a user should update the Head of Household (see **page 126**).

**Tip:** See the [Quick Start Guide for Household Reporting](#)

**Tip:** A reporting household in Sara Alert™ is defined by shared contact information (phone number or email address).

The following section contains information on how to manage Households in Sara Alert. This includes information about how to:

- Create a reporting Household.
- Update exposure data for Household members.
- Change a Head of Household.
- Add or remove a monitoree from a Household.
- Manage reporting Households.

The primary audience for this section is **Public Health Users, Public Health Enrollers, Contact Tracers, and Super Users**. Enrollers can manage who is in a Household, but cannot perform any “monitoring actions” for Household members.

**Table 8: Monitoree Management Capabilities by Role**

Capabilities	Enroller	Public Health	Public Health Enroller	Contact Tracer	Analyst	Administrator	Super User	Page #
Create a Household	✓		✓	✓			✓	117
Enroll a New Monitoree into an Existing Household	✓		✓	✓			✓	120
Import Monitorees into a Household		✓	✓				✓	120
Create a Household on Import		✓	✓				✓	120
Move a Monitoree into a Household	✓	✓	✓	✓			✓	123
Remove a Monitoree from a Household	✓	✓	✓	✓			✓	125
Change Head of Household	✓	✓	✓	✓			✓	126
Update Monitoring Actions for selected Household Members		✓	✓	✓			✓	128
Update Last Date of Exposure or Continuous Exposure for Households		✓	✓	✓			✓	128
Manage Households with Continuous Exposure to a Case		✓	✓	✓			✓	129

\* Enrollers have different search capabilities from the other user types. See **page 73** for more details.

## 11.1 How to Create a Reporting Household During Enrollment

The following user types can create reporting households in the Enrollment Wizard:

- Enrollers
- Public Health Enrollers
- Contact Tracers
- Super Users

To create a reporting household using the Enrollment Wizard:

1) Enroll the Head of Household (HoH) as normal (by following instructions on **page 50**) until arriving at the “Monitoree Review” page.

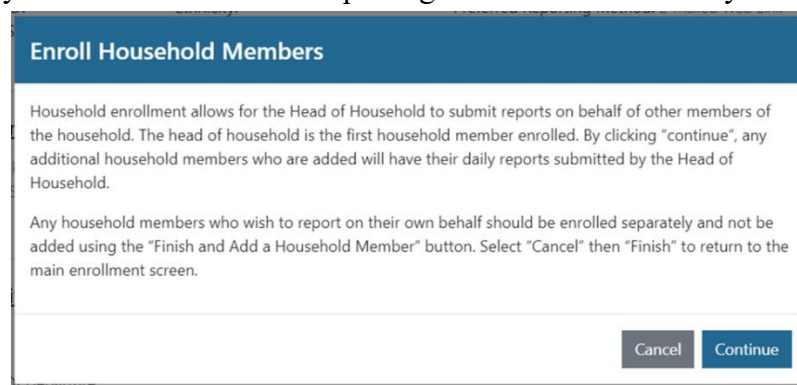
**NOTE:** The first Household member enrolled is the HoH by default; this can be changed later using the “Change Head of Household” button. The HoH will be responsible for reporting on behalf of each subsequent household member enrolled.

2) Instead of clicking “Finish,” select **“Finish and add a Household Member”** to save the HoH record and enrollment of a second household member. This second monitoree’s automated daily reports will be sent to and completed by the HoH.



**Figure 184: Create household using enrollment wizard**

3) Confirm that you would like to enroll reporting household members by clicking **“Continue.”**



**Figure 185: Note how Sara Alert™ handles household enrollment.**

**NOTE:** Any household member who would like submit reports on their own behalf should be enrolled individually and not as a reporting household member as shown below. In this case, the monitoree **must provide unique contact information** (phone number and email address). Unique contact information is required to prevent a race condition, where the system receives

multiple responses from the same number or email and is unable to determine for which monitree the report has been submitted.

4) The household member enrollment screens will be pre-populated with the same address, primary contact information, arrival information, additional planned travel, and potential exposure information as the HoH. 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 monitree review screen.

**Tip:** Users may need to edit exposure information, including Last Date of Exposure, for individuals who were secondarily exposed through a household member.

**NOTE:** Even if contact information is changed for a household member so that it is NOT the same as the Head of Household, the Head of Household will still report on their behalf unless the household member is removed from the reporting household.

**Monitree Details**

**Pepperoni Airport**

Flag for Follow-up

**IDENTIFICATION**

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**

**PRIMARY CONTACT**

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

**ADDRESS**

**HOME ADDRESS (USA)**

Address 1: 123 User Guide Example  
 Address 2: --  
 Town/City: Example  
 State: Tennessee  
 Zip: 11111  
 County: --

**ARRIVAL INFORMATION**

**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**

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

**POTENTIAL EXPOSURE INFORMATION**

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

**RISK FACTORS**

None specified

**NOTES**

User Guide Screenshot

This monitree 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 186: Sara Alert™ Automatically Pre-Populates Information for Household Members.**



5) If there are more household members to enroll, 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 to the group, close enrollment of members to a household by clicking **“Finish”** at the bottom of the enrollment review screen.

The screenshot shows the 'Monitoree Review' screen. At the top, there are two tabs: 'POTENTIAL EXPOSURE INFORMATION' and 'NOTES'. Under 'POTENTIAL EXPOSURE INFORMATION', the following details are listed: Last Date of Exposure: 10/19/2020, Exposure Location: West Vesta, Exposure Country: Northern Mariana Islands. Under 'RISK FACTORS', there is a red square icon and the text 'Member of a Common Exposure Cohort Match'. At the bottom, there are four buttons: 'Previous', 'Finish and Add a Household Member', 'Finish', and 'Cancel'. An orange callout box with an arrow points to the 'Finish' button, containing the text: 'Click to save the record and add stop enrolling new household members'.

Figure 187: Click “Finish” once all Household members have been enrolled.

7) The records for Household members will be linked in the user interface so users can identify monitorees whose reports are submitted by another person (Head of Household). As shown below, a Household summary appears on all Household members records along with their workflow, monitoring status, and continuous exposure status.

The screenshot shows the 'Monitoree Details' screen for 'Pepperoni Airport'. At the top right, it says 'Assigned Jurisdiction: USA, State 49' and 'Assigned User: 12345'. Below the name, there is a 'Flag for Follow-up' button. The screen is divided into two main sections: 'IDENTIFICATION' and 'CONTACT INFORMATION'. Under 'IDENTIFICATION', there are fields for DOB, Age, Language, Sara Alert ID, State/Local ID, CDC ID, NNDSS ID, Birth Sex, Gender Identity, Sexual Orientation, Race, Ethnicity, and Nationality. Under 'CONTACT INFORMATION', there is a 'PRIMARY CONTACT' section with fields for Contact Type, Contact Name, and Phone. Below these sections, there is a link 'Show address, travel, exposure, and case information'. A text block states: 'This monitoree is a member of the following Household where the reporting responsibility is handled by the designated Head of Household:'. Below this text is a table with the following columns: Name, Date of Birth, Workflow, Monitoring Status, and Continuous Exposure?. The table contains two rows: 'Airport, Peter' (with a 'HoH' icon) and 'Airport, Person'. At the bottom, there is a 'Remove From Household' button. An orange callout box with an arrow points to the table, containing the text: 'If a monitoree is in a Household, their record contains a table listing other Household members'.

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

Figure 188: If a monitoree is in a Household, their record contains a table listing other Household members.



## 11.2 How to Enroll a New Household Member into an Existing Record’s Household

The following user types can enroll a new household member into an existing household:

- Enrollers
- Public Health Enrollers
- Contact Tracers
- Super Users

1) Open the appropriate monitoree’s record.

- If you would like to enroll a new monitoree into an existing Sara Alert Household, open the record of the Head of Household who will be responsible for reporting on behalf of the new enrollees.
- If you would like to enroll a new monitoree and have an existing monitoree who is not currently a member of a Sara Alert Household report on their behalf, open the existing monitoree’s record. The existing monitoree will become the Head of Household for the new monitoree after enrollment.

2) In the Monitoree Details section, click “Enroll Household Member.”

Monitoree Details

**Morpheus L Fishburne**

Assigned Jurisdiction: USA, State 46  
Assigned User: 10

[Flag for Follow-up](#)

IDENTIFICATION	CONTACT INFORMATION
<b>DOB:</b> 07/30/1961 <b>Age:</b> 59 <b>Language:</b> English <b>Sara Alert ID:</b> 6951 <b>State/Local ID:</b> GA <b>CDC ID:</b> 23423465 <b>NNDSS ID:</b> 466	<b>PRIMARY CONTACT</b> <b>Contact Type:</b> Unknown <b>Contact Name:</b> -- <b>Phone:</b> 770-700-0000 <b>Preferred Contact Time:</b> Morning <b>Primary Telephone Type:</b> -- <b>Email:</b> -- <b>Method:</b> Telephone call

▼ Show address, travel, exposure, and case information

This monitoree is not a member of a household.

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

Click to enroll a new monitoree with the current monitoree as Head of Household

**Figure 189: 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 117.

## 11.3 How to Create or Add to a Household on Import

All monitorees who submit daily reports to Sara Alert using the same phone number or email address must be part of the same Sara Alert reporting household. As a result, Sara Alert automatically checks the contact information of newly imported monitorees to see if there is a match with an existing monitoree or with another monitoree in the import file.

**Public Health** users, **Public Health Enrollers**, and **Super Users** can use this feature to build new, or add to existing, households on import. This section explains how to:

- Import monitorees directly into an existing monitoree’s household.
- Import an entire new household from the same import file

**NOTE:** Automatic linkage of households based on contact method only occurs at the time of record creation (e.g., enrollment or import). The system does not automatically create household linkages if contact information is updated after record creation.

See **pages 125-128** for instructions on how to modify households in Sara Alert. See **page 52** for general information about how to import monitorees in Sara Alert.

### 11.3.1 How to Import Multiple new Monitorees into a Household with Existing Monitorees

When a user imports monitorees, Sara Alert will automatically check for existing Head of Household or self-reporting monitoree in their jurisdiction who have similar contact information to see if there is a match. If there is, the new monitoree will be placed in the existing monitoree’s household. Users can use this feature to add new monitorees to a household via import (just as new household members can manually be enrolled).

Sara Alert will automatically place imported monitorees into a household with an existing Head of Household or self-reporting monitoree (who then becomes the Head of Household) if both the imported monitorees and the existing monitoree have:

- The same primary telephone number **AND** any of the phone-based Preferred Reporting Methods (SMS Text-message, SMS Texted Weblink, or Telephone Call). The new and existing monitorees do not need to have exactly the same Preferred Reporting Method in this case, so long as they have any of the three phone-based methods.
- The same email address **AND** a Preferred Reporting Method of “Emailed Web Link”

Monitorees with Unknown or Opt-out preferred reporting methods **will not** be added to households automatically on import. Additionally, Sara Alert does not check in jurisdictions the user cannot access to find monitorees with similar contact information.

### 11.3.2 How to Import an Entire Reporting Household from the Same Import File

If an imported monitoree does not have contact information that matches an existing monitoree in the user’s jurisdiction, Sara Alert will then check to see if there is a match with other monitorees in the same import file. If there is a match, the group of monitorees will be enrolled as a household. Users can use this feature to enroll an entire household into Sara Alert on import.

Sara Alert will automatically place imported monitorees into a household **together** if they have:

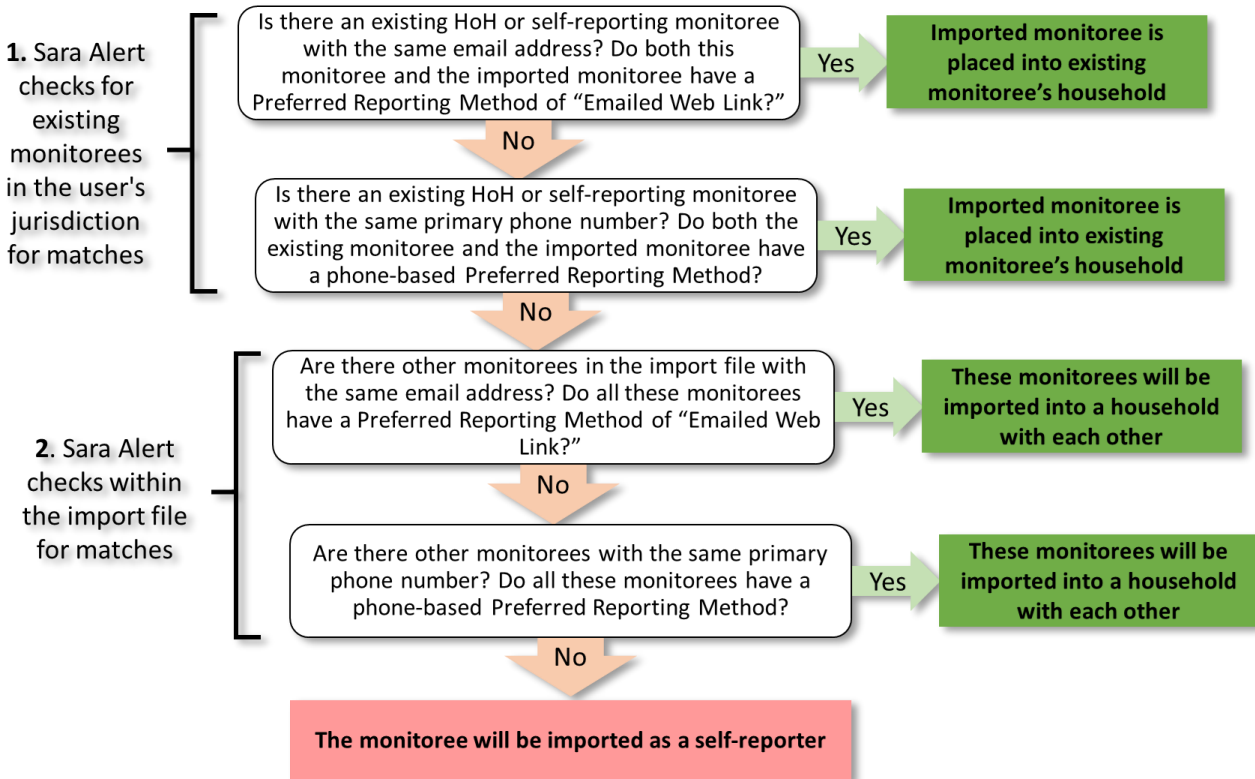
- The same primary telephone number **AND** any of the phone-based Preferred Reporting Methods (SMS Text-message, SMS Texted Weblink, or Telephone Call). The monitorees do not need to have exactly the same Preferred Reporting Method in this case, so long as they have any of the three phone-based methods.
- The same email address **AND** a Preferred Reporting Method of “Emailed Web Link”

Monitorees with Unknown or Opt-out preferred reporting methods **will not** be automatically placed in a household on import. Additionally, Sara Alert does not check in jurisdictions the user cannot access to find monitorees with similar contact information.

### 11.3.3 Sara Alert Household Import Flowchart

The flowchart below explains how Sara Alert checks imported monitorees to see if they should be automatically enrolled into a household.

For each monitoree that is imported, Sara Alert will check for the following:



**Figure 190. Sara Alert checks each monitoree that is imported to see if they should be enrolled as part of a household.**

## 11.4 How to Move an Existing Record into a Reporting Household

The “move to household” function allows users to create households from existing records in the system that the user has access. The following user types can either add a record to an existing household or create a new household from two records:

- Enrollers
- Public Health Users
- Public Health Enrollers
- Contact Tracers
- Super Users

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

**Monitoree Details**

**Morpheus L Fishburne**

Assigned Jurisdiction: USA, State 46  
Assigned User: 10

Flag for Follow-up

IDENTIFICATION	CONTACT INFORMATION
<b>DOB:</b> 07/30/1961 <b>Age:</b> 59 <b>Language:</b> English <b>Sara Alert ID:</b> 6951 <b>State/Local ID:</b> GA <b>CDC ID:</b> 23423465 <b>NNDSS ID:</b> 466	<b>PRIMARY CONTACT</b> <b>Contact Type:</b> Unknown <b>Contact Name:</b> -- <b>Phone:</b> 770-700-0000 <b>Preferred Contact Time:</b> Morning <b>Primary Telephone Type:</b> -- <b>Email:</b> -- <b>Preferred Reporting Method:</b> Telephone call

▼ Show address, travel, exposure, and case information

This monitoree is not a member of a household.

Move To Household Enroll Household Member

**Figure 191: Click "Move to Household."**

2) This will open the “Move to Household” window, which contains a list of all monitorees in either workflow who currently are reporters, either a Head of Household or not in a household (self-reporters).

- Users can use the “Search” bar to find monitorees that match search terms in any of the following fields:
  - 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
- Users can sort columns in the same way as on the Monitoring Dashboards.
- Users can change the number of monitorees shown on a page and navigate the pages of monitorees in the same way as on the Monitoring Dashboards.

**Move To Household**

Please select the new monitoree that will respond for **Fishburne, Morpheus L.**

You may select from the provided existing Head of Households and monitorees who are self reporting. Fishburne, Morpheus L will be immediately moved into the selected monitoree's household.

Search for a monitoree by name, email, primary telephone number, ID, or DOB

Search

Monitoree	State/Local ID	Jurisdiction	Date of Birth	Phone Number	
Dietrich40, Shawn54 <b>HoH</b>		State 29	11/10/1957	555-555-0173	Select
Stuchberry, Town		State			Select
Testington, Test	1234	State			Select
Airport, Peter	12345	USA	01/01/2000		Select
Example3, UAT	1579	County 2	11/10/1957	555-555-0173	Select

Click to sort that column

Show 5 Displaying 5 out of 69 rows. Previous 1 2 3 4 5 ... 14 Next

Can display up to 10 rows per page

Click to navigate to other pages

Cancel

**Figure 192: The list of monitorees can be navigated in the same way as the Monitoring Dashboards.**

3) Click “Select” to add the current monitoree to the selected monitoree’s household. The selected monitoree will report on their behalf as Head of Household.

**Move To Household**

Please select the new monitoree that will respond for **Fishburne, Morpheus L.**

You may select from the provided existing Head of Households and monitorees who are self reporting. Fishburne, Morpheus L will be immediately moved into the selected monitoree's household.

Search

Monitoree	State/Local ID	Jurisdiction	Date of Birth	Phone Number	
Dietrich40, Shawn54 <b>HoH</b>		State 29	11/10/1957	555-555-0173	Select
Stuchberry, Town		State 8	06/30/1942		Select
Testington, Test	1234	State 3	11/25/1994		Select
Airport, Peter	12345	USA	01/01/2000		Select
Example3, UAT	1579	County 2	11/10/1957	555-555-0173	Select

Click to add the current monitoree

Show 5 Displaying 5 out of 69 rows. Previous 1 2 3 4 5 ... 14 Next

Cancel

**Figure 193: Click “Select” to move the monitoree into the selected Household.**

4) The selected HoH will now be responsible for reporting on behalf of the monitoree and the monitoree will appear in their household.

**Monitoree Details**

**Morpheus L Fishburne**

Flag for Follow-up

Assigned Jurisdiction: USA, State 46  
Assigned User: 10

**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: Unknown  
Contact Name: --  
Phone: 770-700-0000  
Preferred Contact Time: Morning  
Primary Telephone Type: --  
Email: --  
Preferred Reporting Method: Telephone call

▼ 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?
Berry, Ron	01/01/1985	Exposure	Actively Monitoring	No

Remove From Household

Figure 194: The selected HoH is now responsible for reporting on behalf of the monitoree.

## 11.5 How to Remove a Household Member from an Existing Reporting Household

A household member cannot be removed from their household until their email and primary telephone number differ from those of the current Head of Household.

The following user types can remove a monitoree from an existing reporting household:

- Enrollers
- Public Health Users
- Public Health Enrollers
- Contact Tracers
- Super Users

**Tip:** If you click “**Remove from Household**” prior to updating the individual’s contact information, you will be prompted to do so before the person can be removed from the reporting household.

1) Open the household member record of interest.  
Then click “**Edit**” for the “Contact Information” section.

**Monitoree Details**

**Morpheus L Fishburne**

Flag for Follow-up

Assigned Jurisdiction: USA, State 46  
Assigned User: 10

**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

Figure 195: Edit contact information for record to be removed from Household.

- 2) Update the primary contact email and primary telephone number in the fields shown below. The contact information must be different from the HoH record. You may also update the “Contact Type” field if applicable. Select “**Next**” then “**Finish**” to save the changes.

**Monitoree Contact Information**

Primary Contact | Alternate Contact

Sara Alert will use the primary contact for communication with the monitoree. Automated messages will be sent to the entered here.

CONTACT TYPE  
Self

PREFERRED REPORTING METHOD  
Telephone call

PREFERRED CONTACT TIME  
Morning

PRIMARY TELEPHONE NUMBER  
555-555-5555

PRIMARY PHONE TYPE

SECONDARY TELEPHONE NUMBER

SECONDARY PHONE TYPE

INTERNATIONAL TELEPHONE NUMBER

E-MAIL ADDRESS  
newemail@email.com

CONFIRM E-MAIL ADDRESS  
newemail@email.com

**Figure 196: Update telephone number and email address.**

- 3) Select “**Remove from Household.**” This monitoree will be removed from the current household and will be responsible for their own reporting.

**Monitoree Details**

**Morpheus L Fishburne**

Assigned Jurisdiction: USA, State 46  
Assigned User: 10

Flag for Follow-up

**IDENTIFICATION**

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**

**PRIMARY CONTACT**

Contact Type: Self  
Phone: 555-555-5555  
Preferred Contact Time: Morning  
Primary Telephone Type: --  
Email: newemail@email.com  
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

Show address, travel, exposure, and contact information

This monitoree is a member of the following household(s):

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

Remove From Household

Click here to remove the monitoree from the household

**Figure 197: Click “Remove from Household” to complete the action.**



## 11.6 How to Change a Head of Household (Household Reporter)

The following user types can change which member of a household is designated “Head of Household” (and therefore is responsible for reporting symptoms on behalf of the group) among records to which the user has access.

- Enrollers
- Public Health Users
- Public Health Enrollers
- Contact Tracers
- Super Users

1) Open the Head of Household’s record. Click the “**Change Head of Household**” button located in the Head of Household’s details section.

The screenshot shows a user interface for managing households. At the top, there is a section titled "Show address, travel, exposure, and case information". Below this, a table lists household members. The first row shows "Badger, Bucky" with a status of "Actively Monitoring" and a "Continuous Exposure?" of "No". An orange callout box with the text "Click here to change which household member is Head of Household" points to the "Change Head of Household" button located below the table. Another button, "Enroll Household Member", is also visible.

**Figure 198: Click “Change Head of Household.”**

2) Select the member of the household you would like to make Head of Household from the drop-down list. The drop-down list only includes other individuals in the current household. The individual selected will be made the new Head of Household and will be responsible for reporting on behalf of all household members.

The screenshot shows a dialog box titled "Edit Head of Household". It contains a section "Select The New Head Of Household" with a note: "Note: The selected monitoree will become the responder for the current monitoree and all others within the list". Below the note is a drop-down menu. The menu is open, showing a list of household members. "Badger, Bucky" is selected and highlighted in blue. An orange arrow points to this selection.

**Figure 199: Select the preferred Head of Household.**

3) Click “**Update**” to save the new Head of Household.

This screenshot is similar to Figure 199, showing the "Edit Head of Household" dialog box. The drop-down menu is still open, and "Badger, Bucky" is selected. An orange arrow points to the "Update" button at the bottom right of the dialog box, next to a "Cancel" button.

**Figure 200: Click Update to save the Head of Household.**

## 11.7 Reporting Household Functions

The following user types can make updates to households based on case status, symptom status, or other health-related information.

- Public Health Users
- Public Health Enrollers
- Contact Tracers
- Super Users

### 11.7.1 How to Update Monitoring Actions, Exposure Information, or Manual Contact Attempts for Monitorees in the Same Reporting Household

When modifying a Household member’s record, changes made to the following data elements can be applied to other selected Household members:

- Manual Contact Attempt
- Monitoring Status
- Exposure Risk Assessment
- Monitoring Plan
- Latest Public Health Action
- Assigned Jurisdiction
- Assigned User
- Case Status
- Continuous Exposure
- Last Date of Exposure
- Follow-up Flag

- 1) Open the record of any of the Household members whose monitoring action or exposure information you need to change.
- 2) Update the appropriate data element.
- 3) A window will appear asking if you want to apply these changes to other household members. Selecting “This monitoree and selected household members” will reveal a table of household members.

**Exposure Risk Assessment**

Are you sure you want to change exposure risk assessment to "Medium"?

Apply this change to:

☐ This monitoree only

☒ This monitoree and selected household members

<input type="checkbox"/>	Name	Date of Birth	Workflow	Monitoring Status	Continuous Exposure?
<input type="checkbox"/>	Gold, Rose	02/05/2000	Exposure	Actively Monitoring	No
<input type="checkbox"/>	Badger, Bucky	01/01/1920	Exposure	Actively Monitoring	Yes

Please include any additional details:

Cancel Submit

**Figure 201: You may apply Monitoring Action or Exposure information changes to other Household members.**

4) Select the monitorees you would like to apply the change to by clicking the box next to their name or select all monitorees by clicking the checkbox in the column header. Then click “Submit” to apply those changes.

**Exposure Risk Assessment**

Are you sure you want to change exposure risk assessment to "Medium"?

Apply this change to:

☐ This monitoree only

☒ This monitoree and selected household members

<input type="checkbox"/>	Name	Date of Birth	Workflow	Monitoring Status	Continuous Exposure?
<input checked="" type="checkbox"/>	Gold, Rose	02/05/2000	Exposure	Actively Monitoring	No
<input type="checkbox"/>	Badger, Bucky	01/01/1920	Exposure	Actively Monitoring	Yes

Please include any additional details:

Then, click "Submit" to apply the changes

Cancel Submit

**Figure 202: Select the monitorees to apply the changes to and click “Submit.”**

5) The selected monitoree’s history section will note the Sara Alert ID of the household member the change originated from.

user@email.com, less than a minute ago (08/03/2021 11:22 EDT) **Monitoring Change**

User changed Exposure Risk Assessment from blank to "Medium" by making that change to monitoree's Head of Household (Sara Alert ID: 6978) and to this monitoree.

**Figure 203: History item will note where the change originated from**

Updating Last Date of Exposure or Continuous Exposure allows the user to extend or shorten the monitoring period for an individual or reporting household members, as necessary. See below for more information on how to manage reporting household members with continuous exposure to a case. If the Last Date of Exposure is updated, the Continuous Exposure status is automatically turned off.

### 11.7.2 How to Manage Reporting Households with Continuous Exposure to a Case

This section covers scenarios specific to managing households where one or more Exposure monitorees are being continuously exposed to a case.

**For each of the scenarios below, keep in mind:**

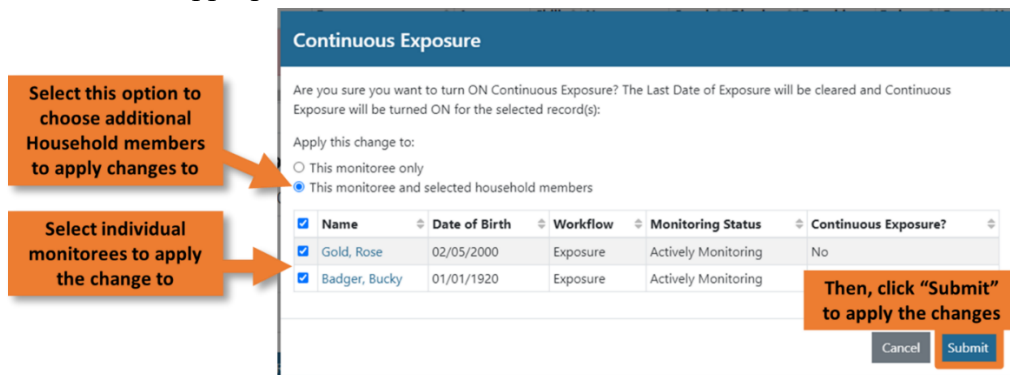
- The Head of Household will continue to report on behalf of household members whose monitoring status is “Actively Monitoring,” even if the Head of Household themselves is no longer being monitored in Sara Alert.
- If at any point the Head of Household does not wish to report on behalf of the household, the user should choose a new Head of Household (and update the primary contact information for that monitoree accordingly—see **page 126**).

### 11.7.2.1 Managing Reporting Households with Monitorees only in the Exposure Workflow

For reporting households with monitoree records only in the exposure workflow (e.g., contacts only), the Head of Household reports on behalf of all active household members until all of the household members are closed in Sara Alert™ (Monitoring Status equal to “Not Monitoring”).

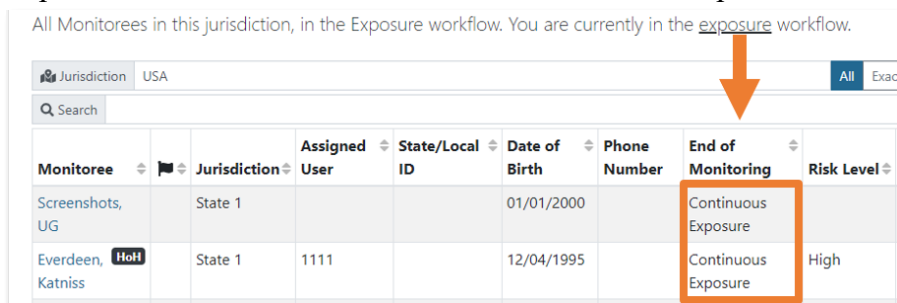
#### 11.7.2.1.1 If multiple enrolled household contacts are being continuously exposed to a case not enrolled in Sara Alert™:

1) Select “Continuous Exposure” on one of the household records in the exposure workflow and choose to apply the change to “This monitoree and selected household members.” Once you have selected the appropriate monitorees, click “Submit.”



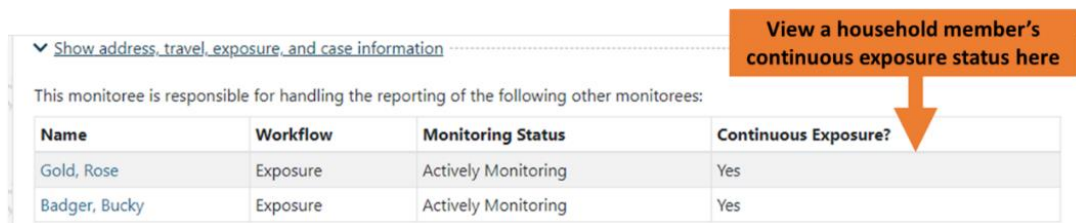
**Figure 204: Enable “Continuous Exposure” for other Household monitorees as appropriate.**

2) The system will automatically extend the monitoring period (e.g., continue to send messages) the selected monitorees until a Last Date of Exposure is specified. The dashboard will show “Continuous Exposure” on the dashboard for all records where this option has been selected.



**Figure 205: You can see if a record is under continuous exposure on the Exposure line list.**

This status is also visible by viewing the HoH record. The HoH’s details view displays a table showing the workflow, monitoring status, and continuous exposure status for all monitoree’s in the household.



**Figure 206: You can see if a record in a reporting household is under continuous exposure under the HoH's Monitoree Details.**

3) Once exposure to a case ends (e.g., the case is no longer infectious), open the record of a reporting household member in the Exposure Workflow. Since the ongoing exposure has ended for the household member, turn off **Continuous Exposure**. A user may select whether to update the Continuous Exposure for either:

- This monitoree only
- This monitoree and selected household members

Select the option to update the appropriate household member records and update the Last Date of Exposure. “**Continuous Exposure**” will be toggled off and the Last Date of Exposure will be updated with the specified date for the monitoree and all selected household members.

**Continuous Exposure**

Are you sure you want to turn OFF Continuous Exposure? The Last Date of Exposure will need to be populated and Continuous Exposure will be turned OFF for the selected record(s):

Apply this change to:

☐ This monitoree only

☒ This monitoree and selected household members

<input checked="" type="checkbox"/>	Name	Date of Birth	Workflow	Monitoring Status	Continuous Exposure?
<input checked="" type="checkbox"/>	Gold, Rose	02/05/2000	Exposure	Actively Monitoring	Yes
<input checked="" type="checkbox"/>	White, Flynn	09/09/1976	Exposure	Actively Monitoring	Yes

Update Last Date of Exposure to:

**Update Last Date of Exposure to apply for all selected monitorees**

Cancel Submit

**Figure 207: Choose for which records to turn off Continuous Exposure and update the Last Date of Exposure.**

### 11.7.2.2 Managing Reporting Households with Monitorees in both the Isolation and Exposure Workflows

For reporting household with monitoree records in both workflows, users can indicate if household members in the exposure workflow are being continuously exposed to the case in the household. The Head of Household will still report on behalf of all reporting household members, regardless of the HoH workflow, case status, or whether they are currently being monitored.

#### 11.7.2.2.1 If all enrolled household contacts are being continuously exposed to a case enrolled in Sara Alert™:

Follow steps 1 and 2 above to indicate that contacts are being continuously exposed to a case. This lets the system know that there is a dependency between the case in the isolation workflow and the monitoring period of the contacts in the exposure workflow.

3) When the household case is closed in the isolation workflow for any reason (e.g., recovered, deceased, etc.) the system will prompt the user to update the Last Date of Exposure for any remaining reporting household members in the exposure workflow (i.e., contacts) who have “continuous exposure” turned on.

- Updating the Last Date of Exposure will automatically turn off continuous exposure for the household contacts and the monitoring period will be automatically calculated.
- The “**Last Date of Exposure**” field will pre-populate with the date of closure. This value can be modified by the user.

**NOTE:** This option is **not** available if the bulk update feature on the dashboard (i.e., directly from a line list as described on **page 77**) is used to close a record.

**Figure 208:** When closing the case out of the isolation workflow, update the Last Date of Exposure for household members in the exposure workflow

**NOTE:** You can check which household members are in Exposure monitoring and have Continuous Exposure ON by viewing the table that appears when “This monitoree and selected household members” is selected.

☐ This monitoree only  
☒ This monitoree and selected household members

<input type="checkbox"/>	Name	Date of Birth	Workflow	Monitoring Status	Continuous Exposure?
<input type="checkbox"/>	Test, Dummy	05/20/1978	Exposure	Actively Monitoring	Yes
<input type="checkbox"/>	Test, Smart	02/28/1996	Exposure	Actively Monitoring	Yes

**Figure 209:** Note how to view which household members are in Exposure Monitoring and have Continuous Exposure turned ON



# 12 HOW TO EXPORT DATA FROM SARA ALERT

Sara Alert™ allows users to export monitoree record data, which can be opened in Microsoft Excel, statistical software, or visualization software as needed to meet local analytical needs. This also allows users to save records prior to them being purged from the system to comply with jurisdiction record retention policies.

**NOTE:** It is the responsibility of each user to follow their organization's protocols to ensure that information is protected once it is exported from Sara Alert™.

The table below shows which users can export monitoree data from Sara Alert:

**Tip:** All dates and times exported will be in UTC. To convert UTC to your local time zone in Excel:

1. Remove UTC from the date, using the LEFT and LEN formulas
2. Convert the date text to a date value using the DATEVALUE and TIMEVALUE formulas and subtract the appropriate number of hours to adjust to your time zone (minus 4 hours to get to EDT for example).

An online converter can be used to provide the hourly difference between UTC and your local time zone.

**Table 9: Availability of export capabilities by user type**

Capability	Enroller	Public Health	Public Health Enroller	Contact Tracer	Analyst	Administrator	Super User	Page #
Export Multiple Records		✓	✓				✓	133
Export Pre-Built Formats		✓	✓				✓	135
Custom Export		✓	✓				✓	136
Export a Single Monitoree's Record		✓	✓				✓	142
Export NBS PHDC XML File		✓	✓				✓	143
Export Analytics		✓	✓		✓		✓	143

## 12.1 How to Export Multiple Records

### 12.1.1 "Canned" System Export File Descriptions

The different export formats currently available are summarized in the section below.

**Table 10: Summary of Sara Alert™ Export Files**

Export Format	Records Included	Data Included	File Type
Line List CSV	Records in the Current Workflow (either Exposure or Isolation)*	Data elements visible across all line lists, in all dashboards	CSV
Sara Alert™ Format	Records in Current Workflow (either Exposure or Isolation)*	All Monitoree Details data elements	XLSX
Purge-Eligible Monitorees	Records Across Both Workflows that are eligible for purge during the next scheduled purge	Monitoree Details Daily Reports, Lab Results, Vaccinations, Transfers, Close Contacts, Common Exposure Cohorts, and Record Edit Histories	XLSX
All Monitorees	Records Across Both Workflows	Monitoree Details, Daily Reports, Lab Results, Vaccinations, Transfers, Close Contacts, Common Exposure Cohorts, and Record Edit Histories	XLSX

\*Export formats that are workflow specific export only records from the user's current workflow; the current workflow is determined based on which dashboard (either Exposure or Isolation) the user is currently viewing at the time of export.



### 12.1.1.1 Line List CSV Export

**Purpose:** Provide a lightweight export restricted to variables shown on the line list view

**Contents:** Includes the line list view of records across all line lists, and across all dashboards. The file will contain the following data elements:

- |                               |                                |                             |
|-------------------------------|--------------------------------|-----------------------------|
| • Sara Alert ID               | • Risk Level                   | • Symptom Onset Date        |
| • Monitoree Name              | • Monitoring Plan              | • Closed At Date and Time   |
| • Jurisdiction                | • Latest Report Date and Time  | • Status (e.g., line list)  |
| • State/Local ID              | • Reason for Closure           | • Extended Isolation Date   |
| • Sex                         | • Transferred at Date and Time | • Reporter ID               |
| • Date of Birth               | • Transferred From             | • Workflow                  |
| • End of Monitoring           | • Transferred To               | • Flag for Follow-Up Reason |
| • Assigned User               | • Expected Purge Date          | • Flag for Follow-Up Note   |
| • Latest Public Health Action |                                |                             |

### 12.1.1.2 Sara Alert Format

**Purpose:** Provide an export restricted to variables populated during enrollment or import.

**Content:** Includes all enrollment data elements from records in either the isolation or exposure workflows (whichever dashboard the user is actively viewing). Enrollment data elements include the following information: demographics, contact information, travel history, planned travel, potential exposure information, and case information (including any lab results). This is the only export format that can also be used for import.

### 12.1.1.3 Excel Export for Purge-Eligible Monitorees

**Purpose:** Allows users to maintain records according to jurisdiction record retention policies prior to system purge of identifying information.

**Content:** Includes all information from purge eligible records across **both** workflows. See **page 9** for an explanation of how purge eligibility is determined. The export includes the following sheets that are linked by the patient ID field:

- Monitorees: enrollment data elements (demographics, contact information, travel history, planned travel, potential exposure information, and case information)
- Assessments: daily report history
- Lab Results: lab results
- Vaccinations: vaccinations
- Close Contacts: close contacts
- Common Exposure Cohorts: common exposure cohorts
- Transfers: record transfer information
- Edit Histories: all entries in the history section of each record

### 12.1.1.4 Excel Export for All Monitorees

This export format includes all information from all records displayed on line lists across **both** workflows. The export includes the following sheets that are linked by the patient ID field:

- Monitorees: enrollment data elements (demographics, contact information, travel history, planned travel, potential exposure information, and case information)
- Assessments: daily report history

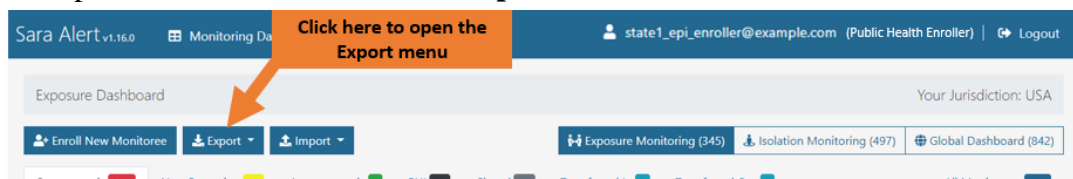
- Lab Results: lab results
- Vaccinations: vaccinations
- Close Contacts: close contacts
- Common Exposure Cohorts: common exposure cohorts
- Transfers: record transfer information
- Edit Histories: all entries in the history section of each record

### 12.1.2 How to Export “Canned” System Export Formats

The records associated with each export file type available are described in the section above.

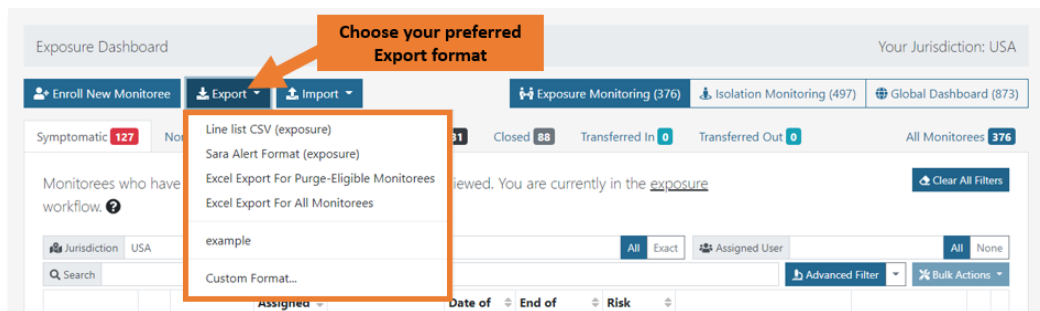
**NOTE:** A user may export each file type a maximum of once per 15 minutes. If a user attempts to export another file of the same format within 15 minutes of the previous export, the following message will display at the top of the screen: “You have already initiated an export of this type in the last 15 minutes. Please try again later.” The system only stores one of each type of export. A requested file must be retrieved before requesting another or the original requested file will be overwritten. If a user requests an export, but no monitorees or data match the request (e.g., a user requests an Excel Export of Purge-Eligible monitorees, but there are no purge-eligible monitorees), the user will be emailed a notice that no export file is available for download.

1) At the top of the dashboard, click the “**Export**” button.



**Figure 210: Export current dashboard view to CSV**

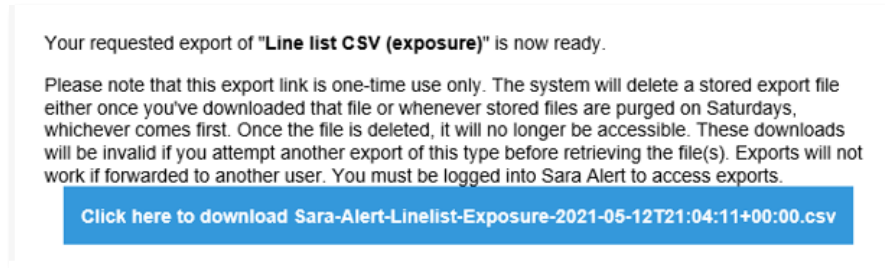
2) From the drop-down menu, select the export type that you are interested in.



**Figure 211: Sara Alert™ offers several export types**

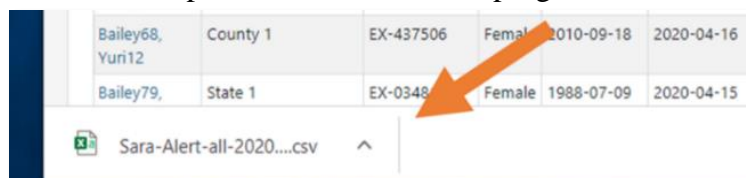
3) After the export type is selected, click “Start Export.” The system will generate an export file and will send a one-time download link to the email associated with your Sara Alert™ account.

4) After receiving the email, select “Click here to download.” The URL of the download will always begin with <https://sara.public.saraalert.org/export/download> followed by a unique set of alphanumeric characters. Always check the URL to verify the download link’s legitimacy.



**Figure 212: Email notification with one-time link to download export file**

5) Click the downloaded file to open in Excel or another program.



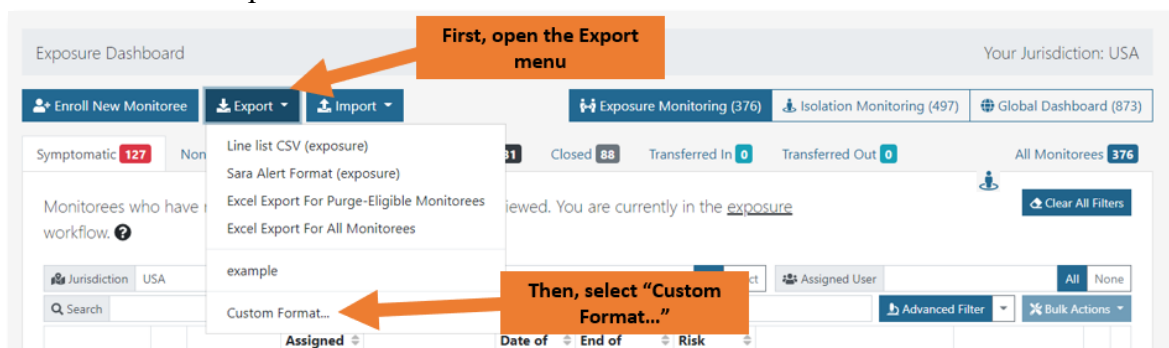
**Figure 213: Downloaded CSV file**

### 12.1.3 How to Use the Custom Export Builder

In addition to the “canned” system export formats explained above, Sara Alert allows users to build and save customized export formats, which only contain selected monitoree records and data of interest. These export files are sent to the user’s email address as described above.

**NOTE:** A user may export each file type a maximum of once per 15 minutes. If a user attempts to export another file of the same format within 15 minutes of the previous export, the following message will display at the top of the screen: “You have already initiated an export of this type in the last 15 minutes. Please try again later.” The system only stores one of each type of export. A requested file must be retrieved before requesting another or the original requested file will be overwritten. If there are no data that match the requested export build (for example, if a user requests an export of only lab results for a group of monitorees who have no lab results), the user will be emailed a notice that no export file is available for download.

1) To open the Custom Export Format Builder, click the “Export” button and select “Custom Format” from the drop-down menu.



**Figure 214: Click “Export” and then select “Custom Format” from the drop-down menu**

2) This will open the Custom Export Format builder. Users create custom exports in four steps:

**Step 1:** Choose which records to export

**Step 2:** Choose which data to export

**Step 3:** (Optional) Save your custom export build

**Step 4:** Click “Export”

The screenshot shows the 'Custom Export Format' dialog box. It has a blue header with the title and a close button. Below the header, it states 'Files will be exported in the Excel (.xlsx) format.' The interface is divided into four sections, each with an orange arrow pointing to it from a label: 'Step 1' points to 'Choose which records to export', 'Step 2' points to 'Choose which elements to export', 'Step 3' points to 'Custom export format name', and 'Step 4' points to the 'Export' button.

**Choose which records to export**

☒ Current monitoree records from Dashboard View (1)

**Linelist:** Exposure - Non-Reporting

**Assigned User:** 31

**Dashboard Search Terms:** dunphy

☐ All monitoree records (127)

☐ Only include monitoree records that meet the following criteria (127):

**Choose which elements to export**

Which data would you like to include for each monitoree?

☐ Monitoree Details

☐ Reports

☐ Lab Results

☐ Vaccinations

☐ Close Contacts

☐ Common Exposure Cohorts

☐ Transfers

☐ History

**Custom export format name**

(Optional name for saved Custom Export)

**Export**

**Figure 215: Users build custom export formats in four steps**

### 12.1.3.1 How to Choose Which Records to Export

The top section of the custom export lets the user choose which records they want to export.

**Custom Export Format**

Files will be exported in the Excel (.xlsx) format.

**Choose which records to export**

☒ Current monitoree records from Dashboard View (1)

**Linelist:** Exposure - Non-Reporting

**Assigned User:** 31

**Dashboard Search Terms:** dunphy

☐ All monitoree records (127)

☐ Only include monitoree records that meet the following criteria (127):

**Choose which elements to export**

Which data would you like to include for each monitoree?

> ☐ Monitoree Details

> ☐ Reports

> ☐ Lab Results

> ☐ Vaccinations

> ☐ Close Contacts

> ☐ Common Exposure Cohorts

> ☐ Transfers

> ☐ History

**Custom export format name**

(Optional name for saved Custom Export)

Save

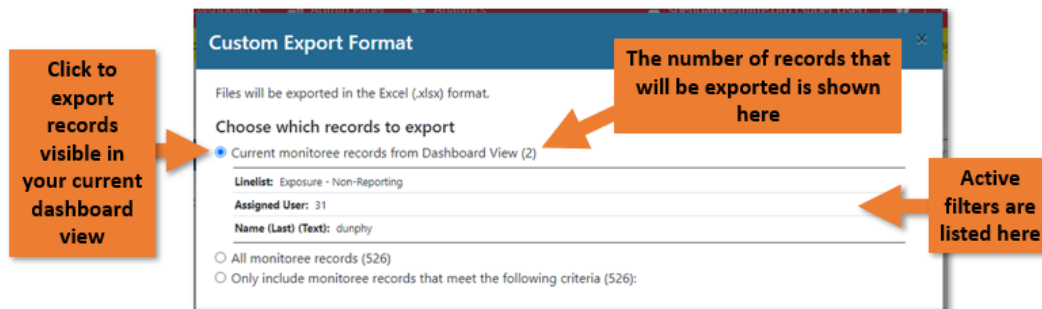
Cancel Export

**Figure 216: The top section of the custom export, which allows users to choose which records to export.**

Select “**Current monitoree records from Dashboard View**” to export only data from the records that you were viewing on the dashboard before you opened the export builder. You can see the Advanced filters you had applied, as well as the number of records that would be exported. In the **example** below, the export builder is configured to import monitorees who:

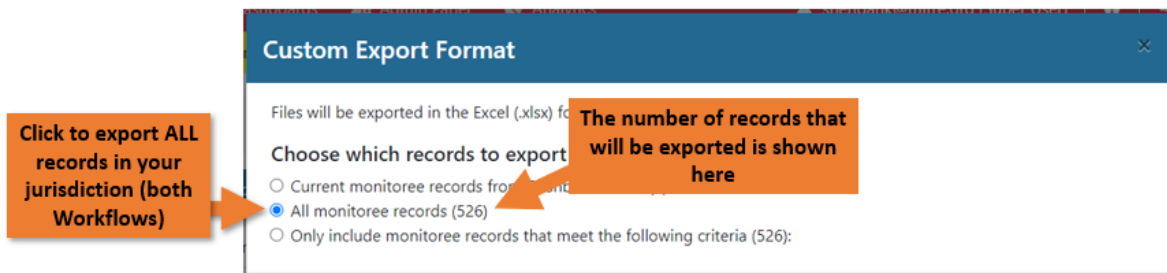
- Are in the Exposure Workflow’s Non-Reporting line list (current line list view); **AND**
- Have Assigned User # 31 (filtered using dashboard Assigned User filter); **AND**
- Have a last name of “Dunphy” (filtered using Advanced Filter).

In this **example**, data from 2 monitoree records would be exported.



**Figure 217:** Select “Current monitoree records from Dashboard View” to export only data from the records that you were viewing before you opened the export builder.

Select “**All monitoree records**” to export data from all monitoree records in your jurisdiction (both Workflows). In this example, data from 526 records would be exported.

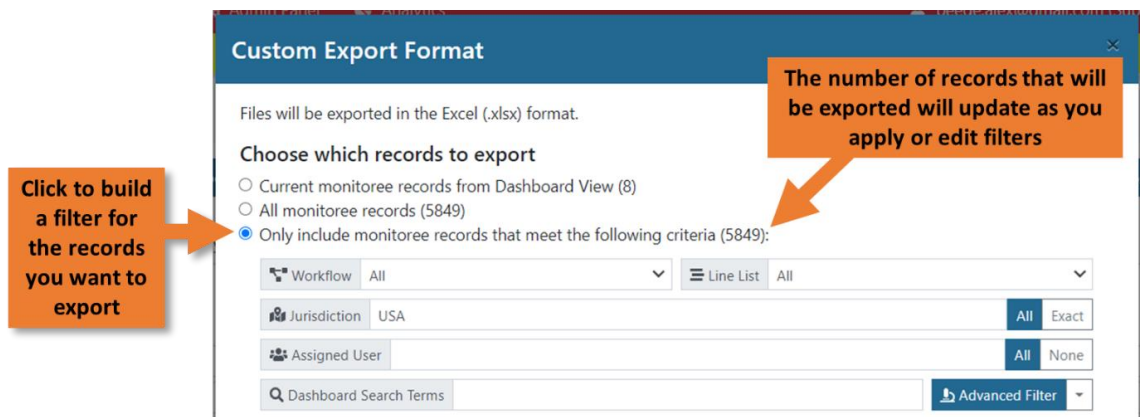


**Figure 218:** Select “All Monitorees” to export data from all monitoree records in your jurisdiction.

Select “**Only include monitoree records that meet the following criteria**” to build a filter for the records you want to export. You can identify the exact records you want to export by setting one or more of the following filters:

- **Workflow:** Exposure, Isolation, or All (Both Workflows).
- **Line List:** Can pick from line lists that are in the selected workflow. If “All” is selected for Workflow, can select from line lists that appear in both workflows (Non-reporting, Closed, Transferred In, Transferred Out) or “All” (includes all monitorees across both workflows).
- **Jurisdiction:** Operates in the same way as the corresponding dashboard quick filter. See **page 65** for how to use this filter.
- **Assigned User:** Operates in the same way as the corresponding dashboard quick filter. See **page 65** for how to use this filter.
- **Dashboard Search Terms:** Operates in the same way as basic search. See **page 64** for how to use this search bar.
- **Advanced Filter:** Click to open the Advanced Filter window. See **page 66** for how to use Advanced Filter.

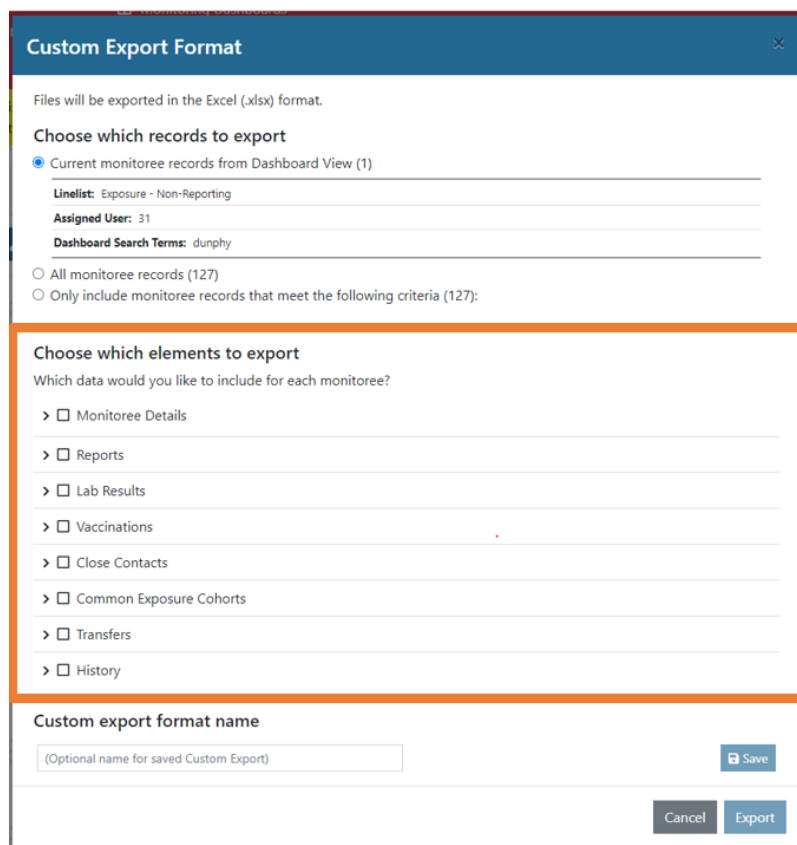
The number of records that will be exported will dynamically update as you apply or edit filters.



**Figure 219:** Select “Only include records that meet the following criteria” to build a filter for the records you want to export.

### 12.1.3.2 How to Choose which Elements to Export

The middle section of the export builder allows users to choose data elements to export. Each element section will export as a separate tab within the export file.



**Figure 220:** The middle section of the custom export allows users to choose which data to export

- 1) Click the “>” to show the list of data elements in that category. Click again to hide the list.
- 2) Click the box next to each element to include it in the export



### 3) Clicking the top-level box will select all elements in that category

The screenshot shows a dialog box titled "Choose which elements to export" with the subtitle "Which data would you like to include for each monitoree?". It contains a list of categories with checkboxes. Annotations include:

- An orange box pointing to the "Monitoree Details" category with the text: "Click the '>' to expand the list and show all data elements".
- An orange box pointing to the "History" category with the text: "Check the top-level box to select all elements in that category".
- An orange box pointing to the "Monitoree Details" category with the text: "The ☐ indicates that some, but not all elements in that category are selected".

The list of categories and their sub-elements is as follows:

- ☒ Monitoree Details
  - > ☐ Enrollment Info
  - > ☒ Monitoring Info
- > ☐ Reports
- > ☒ Lab Results
- > ☐ Vaccinations
- > ☐ Close Contacts
- > ☐ Common Exposure Cohorts
- > ☐ Transfers
- ☒ History
  - ☒ Sara Alert ID
  - ☒ State/Local ID
  - ☒ CDC ID
  - ☒ NNDSS ID
  - ☒ History ID
  - ☒ Original Comment ID
  - ☒ History Creator
  - ☒ History Type
  - ☒ History Comment
  - ☒ History Created Date
  - ☒ History Updated Date
  - ☒ Deleted By
  - ☒ Delete Reason

Figure 221: Users select the data elements they want to export for the records selected above

### 12.1.3.3 How to Save, Update, or Delete Custom Export Format

The bottom section of the export builder allows users to save the export format they have created for future use. Users can save up to 100 custom export formats.

The screenshot shows a dialog box titled "Custom Export Format". It contains the following sections:

- A header stating: "Files will be exported in the Excel (.xlsx) format."
- A section titled "Choose which records to export" with three radio buttons:
  - ☒ Current monitoree records from Dashboard View (1)
  - ☐ All monitoree records (127)
  - ☐ Only include monitoree records that meet the following criteria (127):
- Below the radio buttons, there are three text fields:
  - Linelist: Exposure - Non-Reporting
  - Assigned User: 31
  - Dashboard Search Terms: dunphy
- A section titled "Choose which elements to export" with the subtitle "Which data would you like to include for each monitoree?". It contains a list of categories with checkboxes:
  - > ☐ Monitoree Details
  - > ☐ Reports
  - > ☐ Lab Results
  - > ☐ Vaccinations
  - > ☐ Close Contacts
  - > ☐ Common Exposure Cohorts
  - > ☐ Transfers
  - > ☐ History
- A section titled "Custom export format name" with a text input field containing the placeholder "(Optional name for saved Custom Export)".
- At the bottom right, there are three buttons: "Save", "Cancel", and "Export".

Figure 222: The bottom section of the custom export allows users to save custom export formats

- 1) Enter a name for your custom export format, choose the preferred file type, and click “Save.”

Figure 223: Save your export format

- 2) Saved custom export formats appear in the export drop-down. Click to open a saved format.

Figure 224: Saved custom formats appear in the export drop-down.

- 3) If desired, make changes to export format. Click “Update” to save any changes. If a saved export format is no longer of use, click “Delete.” **NOTE:** A deleted custom export format cannot be recovered.

Figure 225: Saved custom formats can be deleted or updated

## 12.2 How to Export a Single Monitoree Record

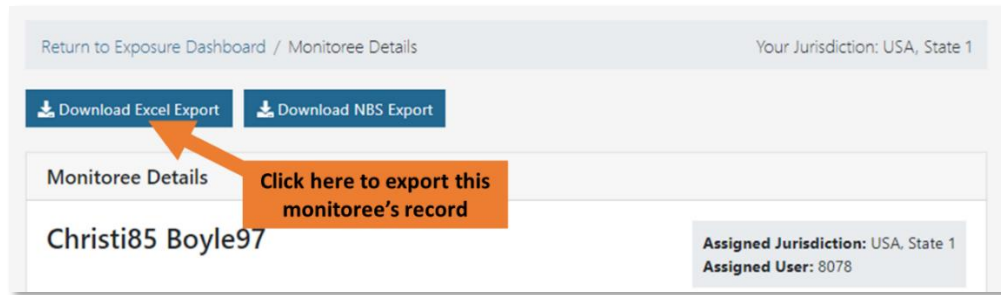
### 12.2.1 Excel Export

The Excel export for a single record includes the following four sheets that are linked by the patient ID field:

- Monitorees: enrollment data elements (demographics, contact information, travel history, planned travel, potential exposure information, and case information)
- Assessments: daily report history
- Lab Results: lab results
- Vaccinations: vaccinations
- Histories: all entries in the history section of each record

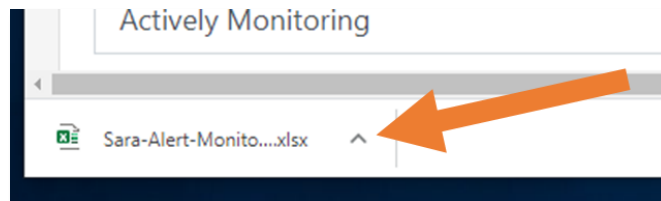
**NOTE:** There is no limit to the number of times a single record can be exported during an hour timeframe.

- 1) To download an individual patient’s record, open the record of interest and click the “**Download Excel Export**” button at the top left of the screen (above “Monitoree Details”).



**Figure 226: Download an individual monitoree’s record**

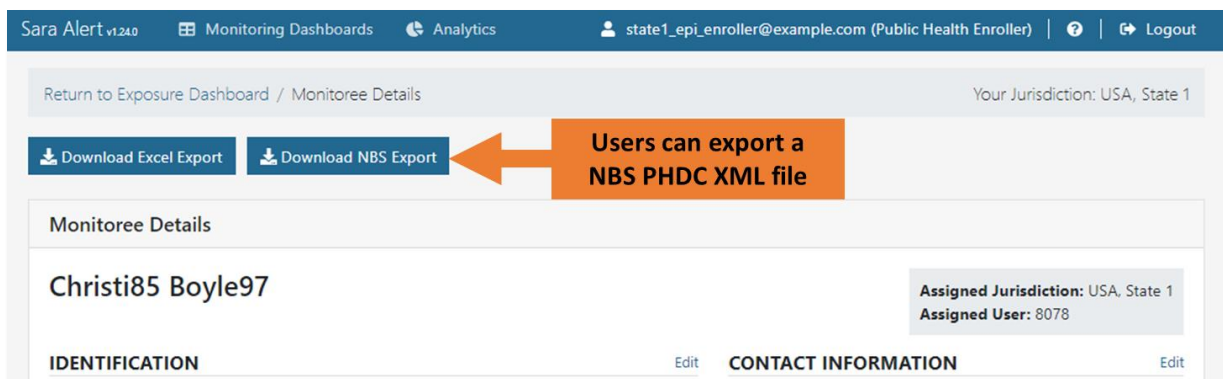
- 2) For the individual record export, the file will download directly into your browser. You will not receive an emailed link as with other export types.



**Figure 227: Individual monitoree records will download directly through the browser**

## 12.2.2 NBS Export

Users can also export a Public Health Document Container (PHDC) XML document that contains monitoree details and symptomatic assessments. The downloaded file can then be imported to the NEDSS Base System (NBS).



**Figure 228: Users can export an NBS PHDC XML file**

## 12.3 How to Export Analytics

**Public Health users, Public Health Enrollers, Analysts, and Super Users** can also export data from the analytics summary. See **page 145** for more information.

## 13 HOW TO VIEW ANALYTICS IN SARA ALERT

Sara Alert™ creates automated, daily analytics summaries that show aggregated data from both the Exposure and Isolation workflows. Users view aggregated monitoring and epidemiological data for their assigned jurisdiction (e.g., local, state, nationwide) and can view summary maps showing Sara Alert™ usage. The data that drives the analytics summary is currently updated once a day for performance reasons.

**Public Health users, Public Health Enrollers, Analysts, and Super Users** can access the analytics summary. **Enrollers** have access to a limited analytics view that focuses on the number of new monitorees enrolled.

The table below shows which user types have access to system-generated analytics:

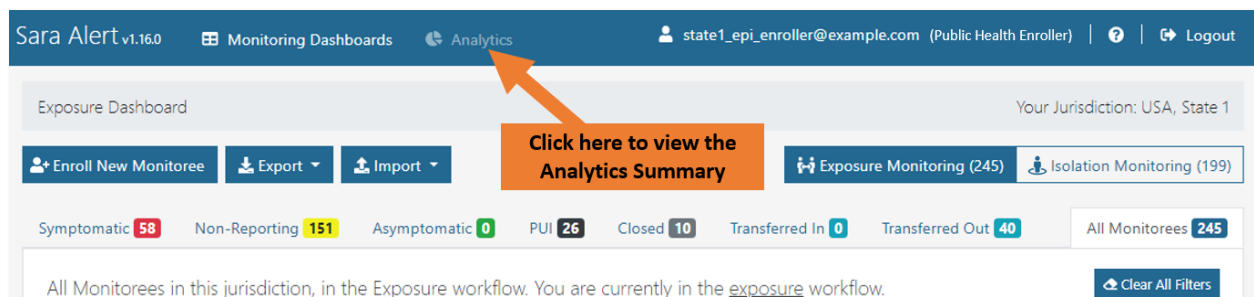
**Table 11: Availability of analytics capabilities by user type**

Capability	Enroller	Public Health	Public Health Enroller	Contact Tracer	Analyst	Adminis-trator	Super User	Page #
View Analytics Summary		✓	✓		✓		✓	144
Export Analytics		✓	✓		✓		✓	145
View Enroller Analytics	✓							149

### 13.1 View Analytics Summary

**NOTE:** This section applies to **Public Health** users, **Public Health Enrollers**, and **Super Users**. **Analysts** will automatically be brought to the analytics summary on login (since they do not have access to any other views)

Click “**Analytics**” on the navigation bar to access this summary. For a detailed description of the analytics summary, please see **page 145**.

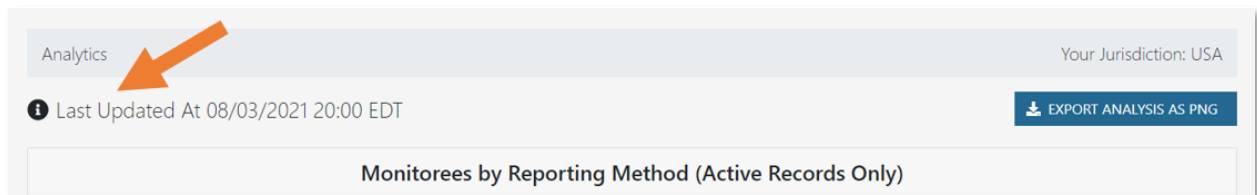


**Figure 229: Click “Analytics” to view the analytics summary**

## 13.2 Navigate and Export the Analytics Summary

A user assigned the analyst role will be **taken directly to the Analytics Summary** upon login as shown below. The analytics summary shows aggregated data from both the exposure and isolation workflows. Public health users can view aggregated monitoring and epidemiological data for their assigned jurisdiction (e.g., local, state, nationwide) and can view summary maps showing Sara Alert™ usage.

1) Review the analytics summary and configure the display of information based on preference (e.g., data from displayed as table or charts) The data that drives the analytics page is updated once a day for performance reasons. The time of the last update can be found at the top of the analytics summary. Analytics are typically updated daily at around midnight Eastern Time.



**Figure 230: Analytics summary and time of the last update can be found at the top of the screen**

2) Some tables can be exported as a CSV file. Click the corresponding export button to download the file.



**Figure 231: Some analytics datasets can be exported as a CSV file**

3) A user can view the number of monitorees in the Exposure Workflow (contacts) that have become cases in the “Monitoree Flow Over Time (All Records)” table. The table counts monitorees that were originally enrolled in the Exposure Workflow and meet one of the following criteria:

- Record is moved to the Isolation workflow
- Record is closed by updating Case Status to “Probable” or “Confirmed” and selecting “End Monitoring”
- Record is closed by updating Monitoring Status with a Reason for Closure of either “Meets Case Definition” or “Confirmed Case”

If a monitorees record initially meets one of these conditions but is then edited (e.g., if the record is closed and then reopened), it may be removed from the count as shown in the flowchart below:

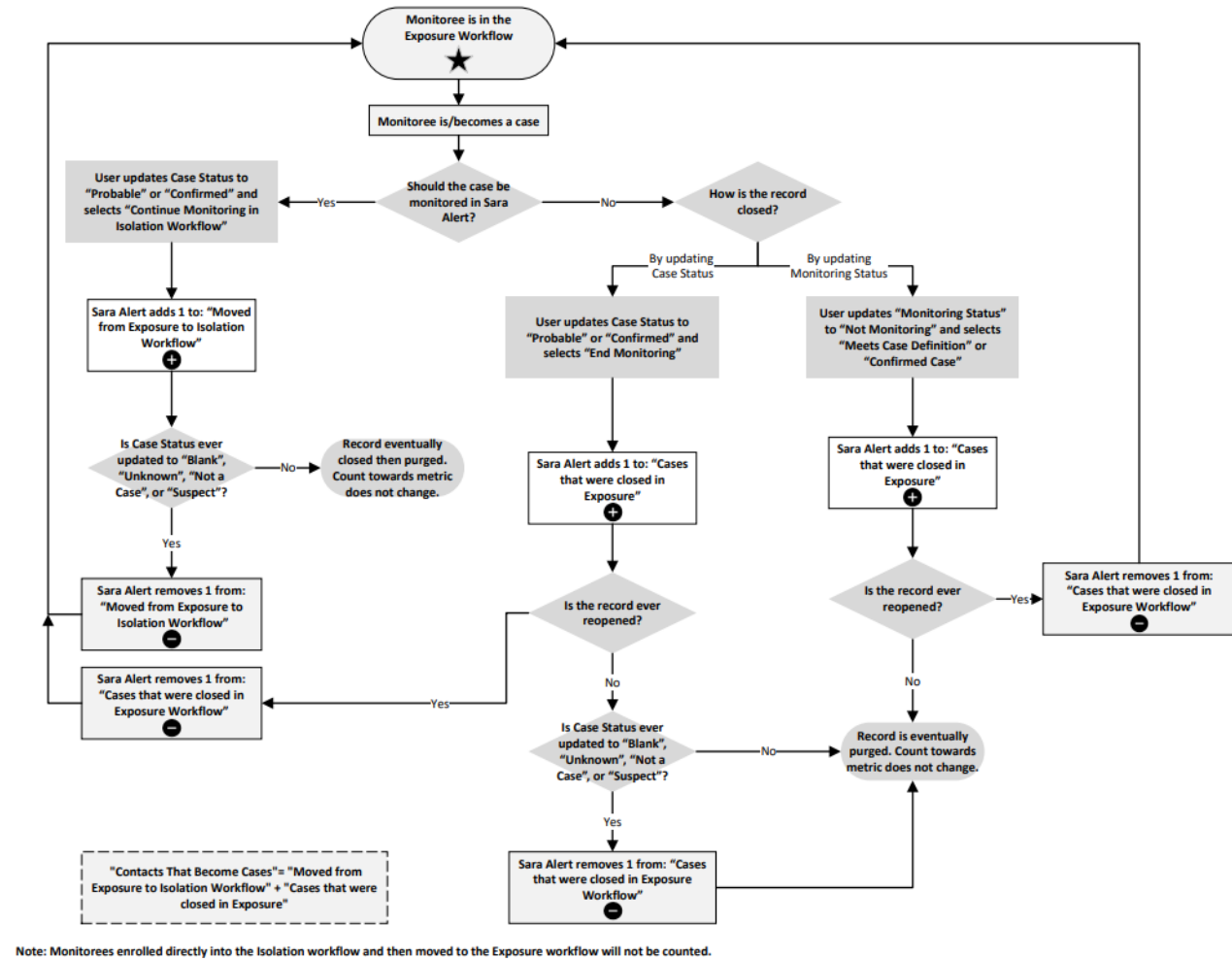
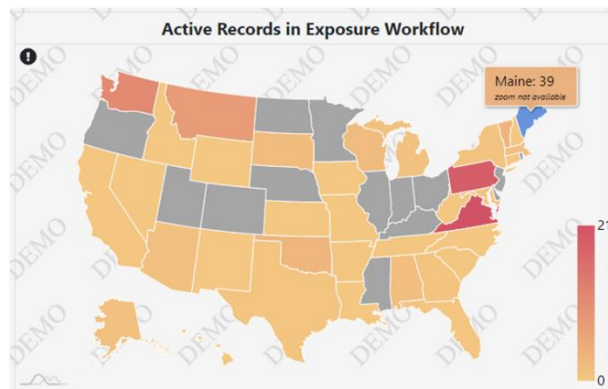


Figure 232: Exposure to Case Development Count Workflow

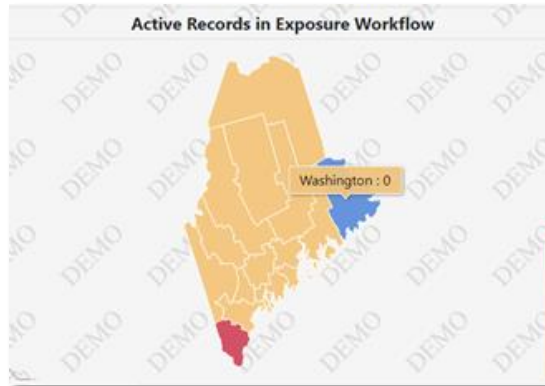
4) A user can view the maps summarizing the total number of all active monitorees in Sara Alert™ by workflow according to the specified home address state. Users can see the number of monitorees in each jurisdiction by placing their cursor over the location they wish to view.



**Tip:** These maps only show Sara Alert™ usage. Totals may not match public reports of the number of cases since all jurisdictions do not use the isolation workflow.

Figure 233: View the number of active monitorees per state by placing your cursor over it

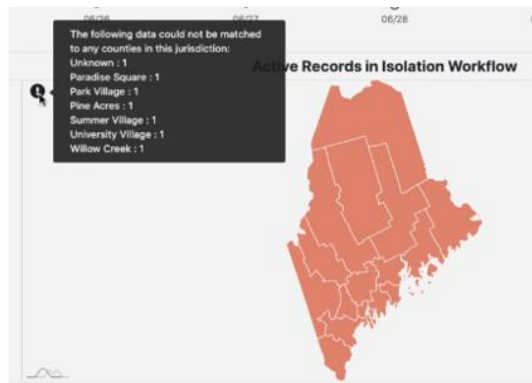
5) Users can view a map summarizing the total number of active monitorees by workflow *within their assigned jurisdiction* according to the monitoree’s home county by clicking on maps to zoom. This will zoom the map in to show counties when available. Users can see the number of active monitorees per county by hovering their cursor over the location they wish to view. A user cannot view county-level data for all records; only records the user has access to.



**Tip:** County is not a required field so the local view will not be populated if the user’s jurisdiction does not use this field.

**Figure 234: View county-level data for records in your assigned state or territory by clicking on it and placing your cursor over the counties you would like to view**

6) Users can view monitorees that cannot be mapped to counties within a state due to missing values, spelling errors, entry does not match expected value (e.g., “Montgomery” is a valid entry; “Montgomery County” is not) by scrolling over the exclamation point icon in the upper left corner of each map. This button will not appear if all records were able to be mapped to a county



**Figure 235: Scroll over the exclamation point icons to view monitorees who could not be matched to counties within a jurisdiction**

7) Users can view historic map data by clicking on the circles above the desired date.



**Figure 236: Click the circles to visualize data from that date**



8) To view areas outside of the 50 states and federal district, click the **“View Insular Areas”** button in the bottom left corner of the maps. County-level data is not available for these areas.



Figure 237: Click "View Insular Areas"

9) Click the **“Back to Country View”** button to return to the state map.

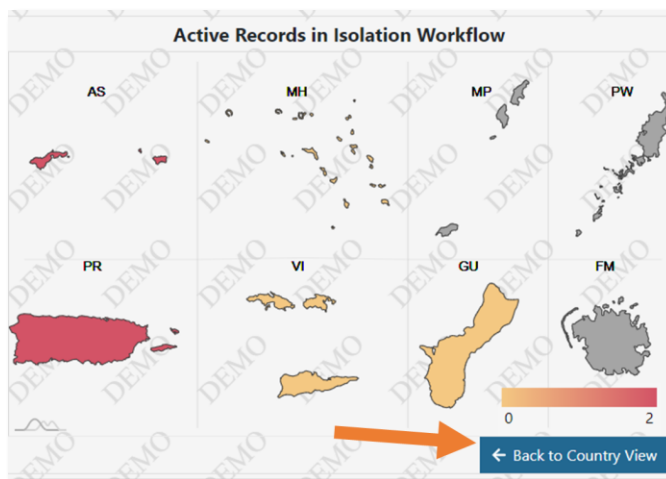


Figure 238: Click "Back to Country View"

10) Select **“Export Analysis as PNG”** to download a screen capture of the entire dashboard display. The export will reflect the current dashboard view configuration (e.g., data displayed in table, graph or map format).

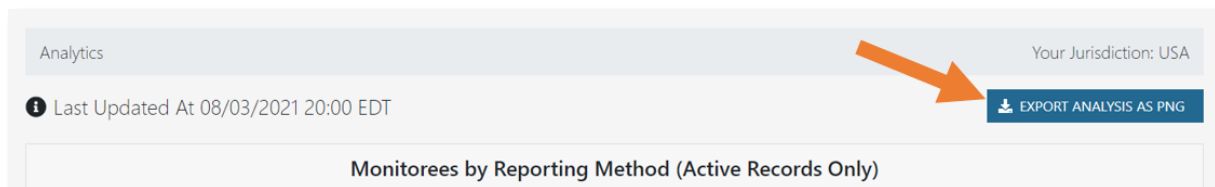


Figure 239: Export the summary

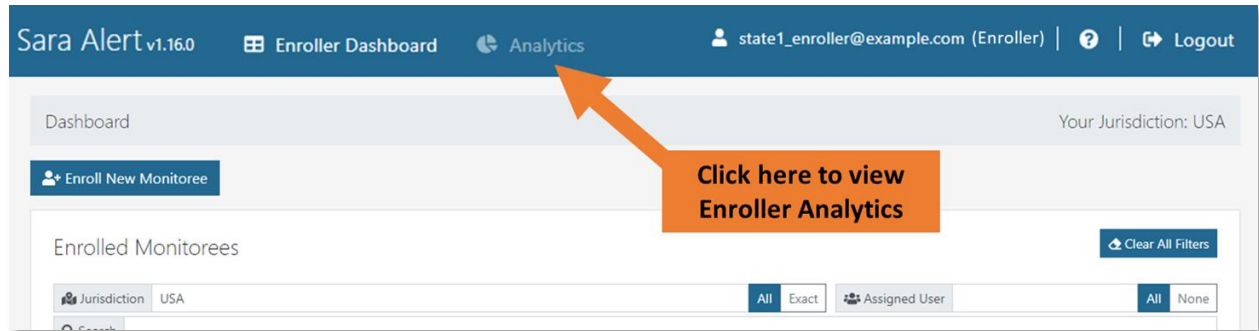
**Tip:** This functionality is not available using Internet Explorer 11.

## 13.3 How to View Enroller Analytics

The analytics summary for **Enrollers** shows:

- Summary of enrollments made by user (“Your statistics”)
- Summary of total enrollments in the user’s jurisdiction (“System Statistics”)

**Only Enrollers** can view this summary. To view enrollment analytics, select the “**Analytics**” tab in the header. This data used in the analytics summary is updated once a day.



**Figure 240: View Enroller analytics**

## 14 HOW TO MANAGE SARA ALERT USERS

**Administrators** and **Super Users** are responsible for managing Sara Alert™ Users. These users can only manage users within their assigned jurisdiction. If a local **Administrator or Super User** needs assistance with managing their users, please contact the Sara Alert Help Desk.

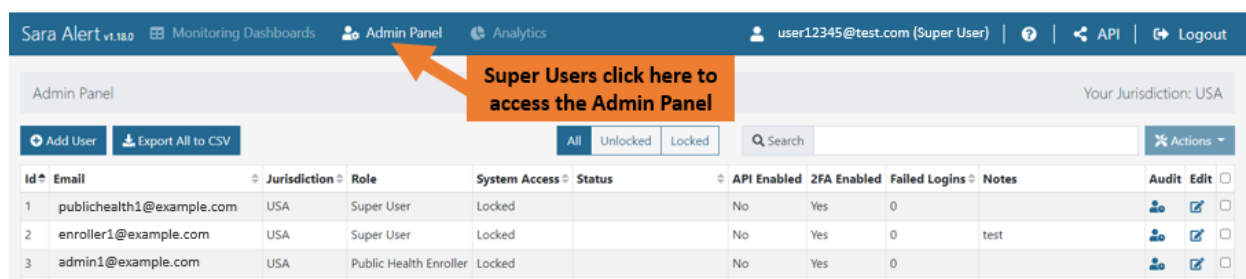
The table below shows the user management capabilities available to Administrators and Super Users:

**Table 12: Availability of user account management capabilities by user role**

Capability	Enroller	Public Health	Public Health Enroller	Contact Tracer	Analyst	Administrator	Super User	Page #
View and Navigate the Admin Panel						✓	✓	150
Add a New User						✓	✓	151
Export the User List						✓	✓	152
Edit User Account Information						✓	✓	153
View User Account Event History						✓	✓	154
Lock or Unlock User Accounts						✓	✓	155
Reset User Passwords						✓	✓	157
View 2FA Configuration Status						✓	✓	158
Reset Two-Factor Device Pairing						✓	✓	159
Enable API Access						✓	✓	160

### 14.1 How to View and Navigate the Admin Panel

**Administrator** users are brought to the Admin Panel on login. **Super Users** access the Admin Panel by clicking on “Admin Panel” in the navigation bar.



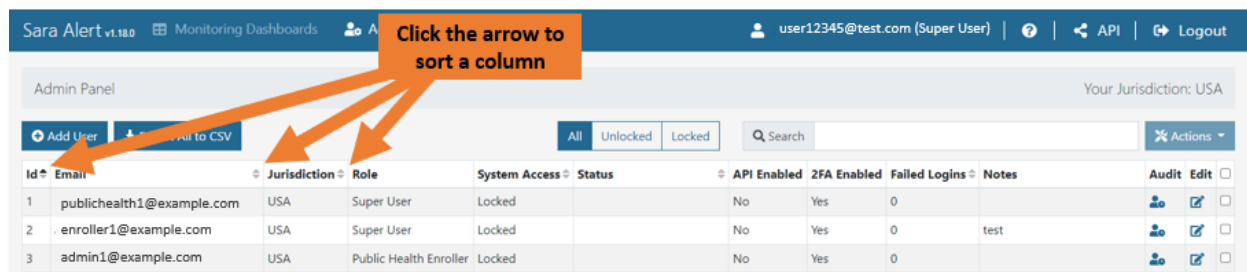
**Figure 241: Super Users access the Admin Panel by clicking the “Admin Panel” button**

The Admin Panel shows the list of current users in their assigned jurisdiction with the following associated information:

- **ID:** Shows the unique system ID associated with the user. Jurisdictions may use this number for the assigned user field, but there is no automatic linkage between this ID and the “Assigned User” field in a monitoree’s record.

- **Jurisdiction:** Shows the complete access hierarchy for the user. Users (including Administrators) have access to all data (specific to their role) for their jurisdiction and all sub-jurisdictions.
- **Email:** User's email address
- **Role:** User's role. Defines which capabilities a user should have.
- **System Access:** Whether the user's account is locked or unlocked.
- **Status:** If account is Unlocked, shows whether the user has logged in in the past 30 days. If account is Locked, shows whether the account was auto-locked by the system or an editable account status.
- **API Enabled:** Whether the user has access to the API
- **2FA Enabled:** Whether the user's account has configured their required 2-factor authentication
- **Failed Login Attempts:** The number of consecutive failed login attempts since the last successful login. The system will automatically lock a user's account after 5 failed login attempts.
- **Notes:** Displays any notes that have been documented for that user. Any notes associated with a user's account will be visible to all Administrator and Super Users who have that user in their jurisdiction.

Click on headers to sort based on that column.



Sara Alert v1.18.0 Monitoring Dashboards Admin Panel user12345@test.com (Super User) API Logout

Your Jurisdiction: USA

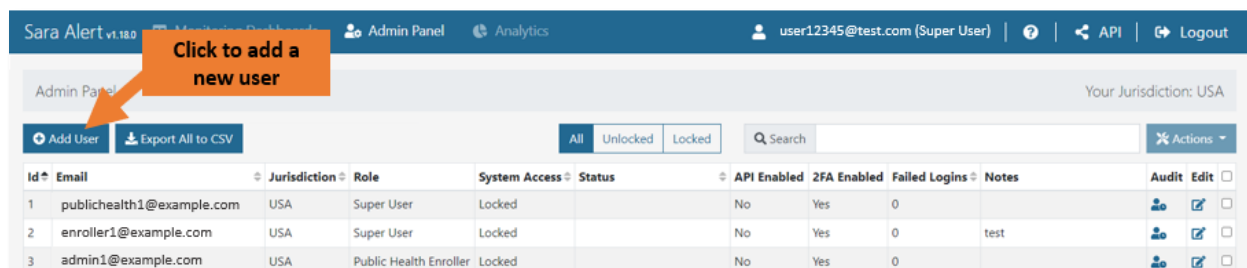
Buttons: Add User, Export All to CSV, All, Unlocked, Locked, Search, Actions

ID	Email	Jurisdiction	Role	System Access	Status	API Enabled	2FA Enabled	Failed Logins	Notes	Audit	Edit
1	publichealth1@example.com	USA	Super User	Locked		No	Yes	0			
2	enroller1@example.com	USA	Super User	Locked		No	Yes	0	test		
3	admin1@example.com	USA	Public Health Enroller	Locked		No	Yes	0			

Figure 242: Click the column header to sort that column

## 14.2 How to Add a New User

1) Click the “Add User” button.



Sara Alert v1.18.0 Monitoring Dashboards Admin Panel Analytics user12345@test.com (Super User) API Logout

Your Jurisdiction: USA

Buttons: Add User, Export All to CSV, All, Unlocked, Locked, Search, Actions

ID	Email	Jurisdiction	Role	System Access	Status	API Enabled	2FA Enabled	Failed Logins	Notes	Audit	Edit
1	publichealth1@example.com	USA	Super User	Locked		No	Yes	0			
2	enroller1@example.com	USA	Super User	Locked		No	Yes	0	test		
3	admin1@example.com	USA	Public Health Enroller	Locked		No	Yes	0			

Figure 243: Add a new user

2) This will open the “Add User” window. Enter the new user’s email address, select their jurisdiction and role from the drop-down lists, and toggle their API access. You can also document notes for that user. Click “**Save**” to complete the process.

Figure 244: Complete new user entry

## 14.3 How to Export the User List

To export a list of users for your jurisdiction, click the “**Export to CSV**” button.

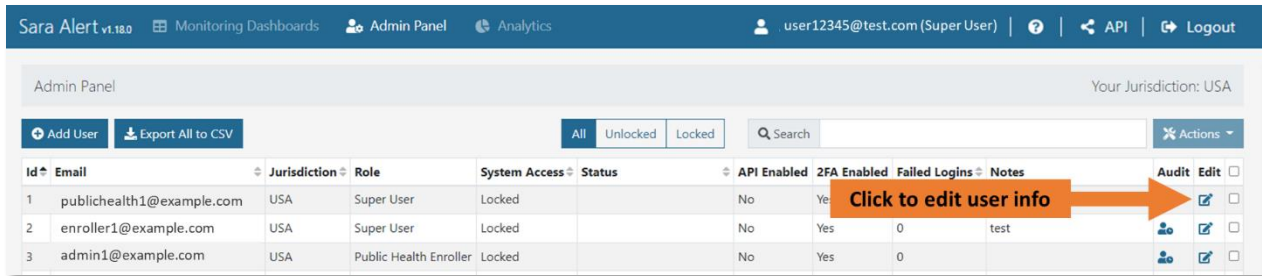
Id	Email	Jurisdiction	Role	System Access	Status	API Enabled	2FA Enabled	Failed Logins	Notes	Audit	Edit
1	publichealth1@example.com	USA	Super User	Locked		No	Yes	0			
2	enroller1@example.com	USA	Super User	Locked		No	Yes	0	test		
3	admin1@example.com	USA	Public Health Enroller	Locked		No	Yes	0			

Figure 245: Export a list of users

## 14.4 How to Edit User Account Information

User information can be edited one record at a time on the administration panel.

1) To edit a user's information, first click the **"Edit"** icon for that user.



**Figure 246: Click the "Edit" icon**

2) This will open the "Edit User" window. You can edit the user's Email Address, Jurisdiction, Role, System Access, Status (if user account is locked), API access, and add or edit Notes. Click **"Save"** to confirm your changes.

The 'Edit User' window is shown with the following fields and controls:

- Email Address:** A text input field containing 'publichealth1@example.com'.
- Jurisdiction:** A dropdown menu with 'USA' selected.
- Role:** A dropdown menu with 'Super User' selected.
- System Access:** A toggle switch labeled 'Locked'.
- Status:** A dropdown menu.
- API Access:** A toggle switch labeled 'Disabled'.
- Notes:** A large text area for adding or editing notes. A character count '5000 characters remaining' is visible at the bottom right of the text area.
- Buttons:** 'Cancel' and 'Save' buttons at the bottom right.

**Figure 247: Edit the appropriate fields and click "Save"**

## 14.5 How to View User Account Event History (Audit)

Sara Alert allows Administrators and Super Users to view user account events that were logged after release 1.18 on 12/17/20.

1) To view this event history, click the “Audit” button associated with that user

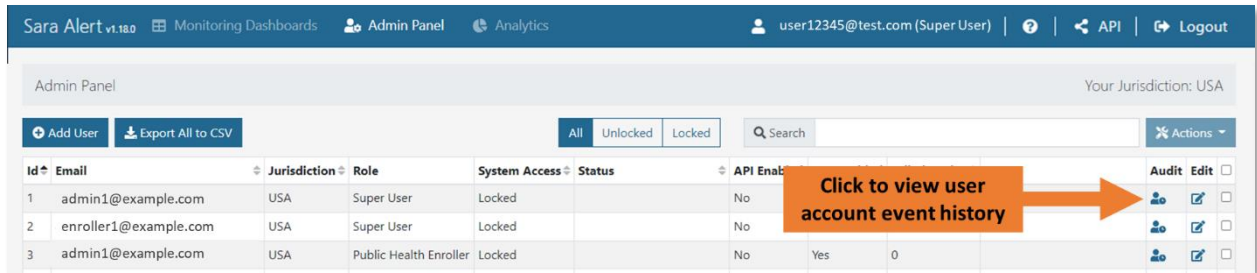


Figure 248: Click the “Audit” icon

2) This will open the “Audit Events” window, which contains a table with three columns:

- **Triggered by:** Shows the username of the user who performed the action
- **Action:** Lists users sign-ins and edits made to a user’s account
- **Timestamp:** Lists the time each action occurred.

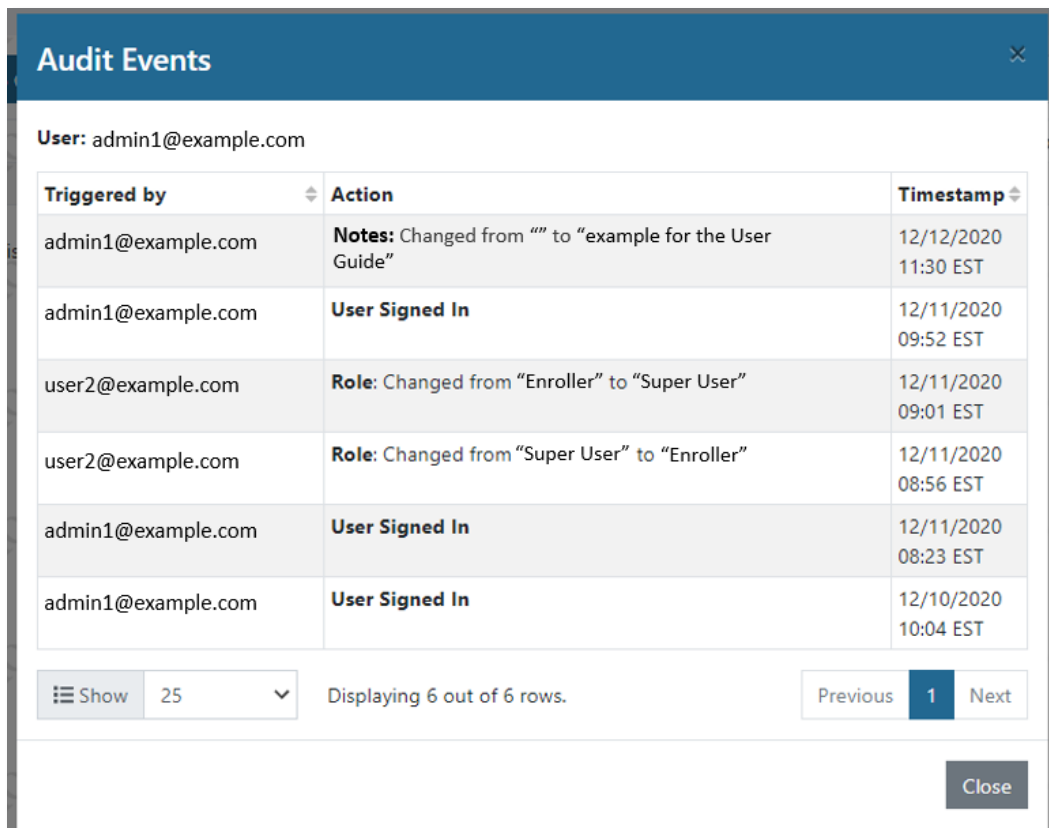


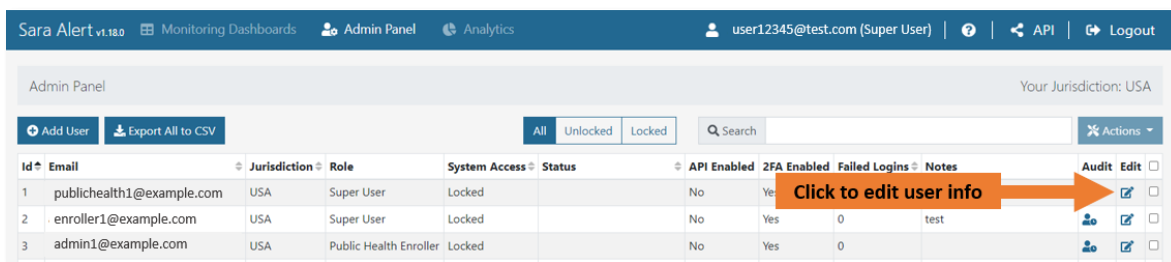
Figure 249: Click the “Audit” icon



## 14.6 How to Lock or Unlock a User's Account and Set a User's Status

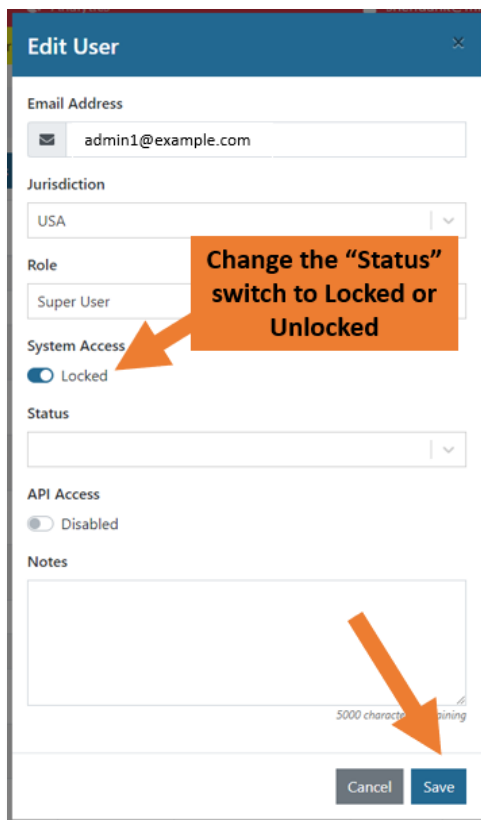
Sara Alert will automatically lock a user's account after 5 unsuccessful login attempts. An Administrator or Super User can also manually lock a user's account. Locked users cannot log in to Sara Alert and will not receive status emails from the Sara Alert system. If a user's account is unlocked, the system will automatically set the user's status to "active" if the user has been active in the system within the past 30 days, or "inactive" if it's been at least 30 days since their last activity. If a user's account is locked due to unsuccessful login attempts, the system will automatically set the user's status to "Auto-locked by the System," or an Administrator or Super User can manually add a status.

1) To manually lock or unlock a user's account, first click the **"Edit"** icon for that user



**Figure 250: Click the "Edit" icon**

2) Toggle the **"System Access"** switch to lock or unlock the user's account. Click **"Save"** to confirm.



**Figure 251: Toggle the "Status" switch to lock or unlock the account**

3) If a user's account is **unlocked**, the system will automatically populate the "Status" field with "active" if the user has been active in the system within the past 30 days, or "inactive" if it's been at least 30 days since their last activity in Sara Alert. Super Users and Administrators cannot manually edit an unlocked user's status.

If a user's account is **locked** due to 5 more or more failed login attempts, the system will automatically set the user's status to "Auto-locked by the system". If a user's account is manually locked, their status will default to blank. The user's status can then be manually updated by an Administrator or Super User.

**Edit User**

Email Address\*  
admin1@example.com

Jurisdiction  
USA

Role  
Admin

System Access  
☐ Unlocked

Status  
Inactive

API Access  
Has not been active in the system for at least 30 days  
☐ Disable

Notes  
5000 characters remaining

Cancel Save

**If a user's account is Unlocked, the system will set their status based on how long it has been since they last used the system**

**Edit User**

Email Address  
admin1@example.com

Jurisdiction  
USA

Role  
Public Health Enroller

System Access  
☒ Locked 9 failed login attempts

Status  
Auto-locked by the System

Auto-locked by the System

No longer an employee

No longer needs access

Other

5000 characters remaining

Cancel Save

**If a user's account is Locked, the system will automatically set an initial status. A user can then manually update the status.**

**Figure 252: A user's Status will be automatically set by the system or may be manually set depending on their System Access**

4) You can see an account's System Access and Status from the Administrator Dashboard view.

**Note where System Access and Status is shown on the Admin Panel**

Id	Email	Jurisdiction	Role	System Access	Status	API Enabled	2FA Enabled	Failed Logins	Notes	Audit	Edit
1	super1@example.com	USA	Super User	Locked	No longer an employee	No	Yes	0			
2	admin1@example.com	USA	Super User	Locked	No longer needs access	No	Yes	0	test		
3	enroller1@example.com	USA	Public Health Enroller	Unlocked	Active	No	Yes	0			

**Figure 253: The "System Access" column shows if a user's account is locked or unlocked and the "Status" column shows additional information on a user's System Access status**

5) Users will be unable to log in to a locked account.

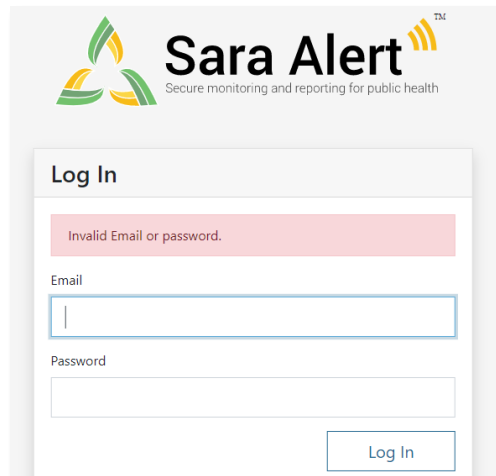


Figure 254: Users cannot log in to a locked account

6) You can filter the Admin Panel to show only unlocked, locked, or all users.

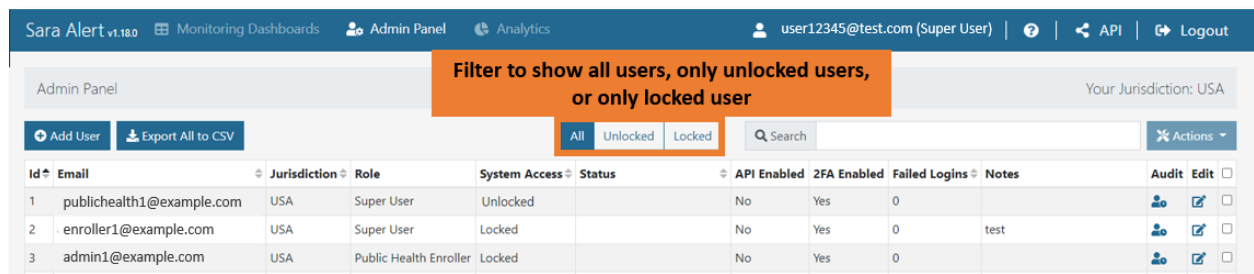


Figure 255: Use the filter buttons to filter by lock status

## 14.7 How to Reset User Passwords

User passwords can be reset multiple accounts at a time. If you click the select box in the menu header, you can reset passwords for all accounts visible on that page (not all accounts in the system).

1) Sara Alert™ handles password reset requests via email. If one or more of your users requests a password reset, first select the user(s) by clicking the box in the far right column.

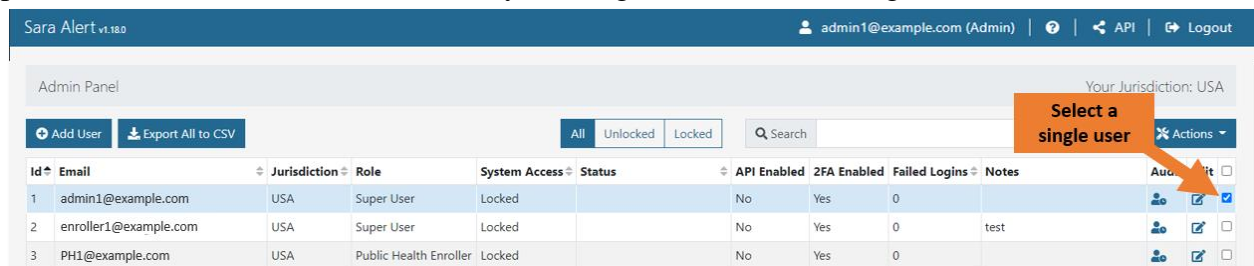
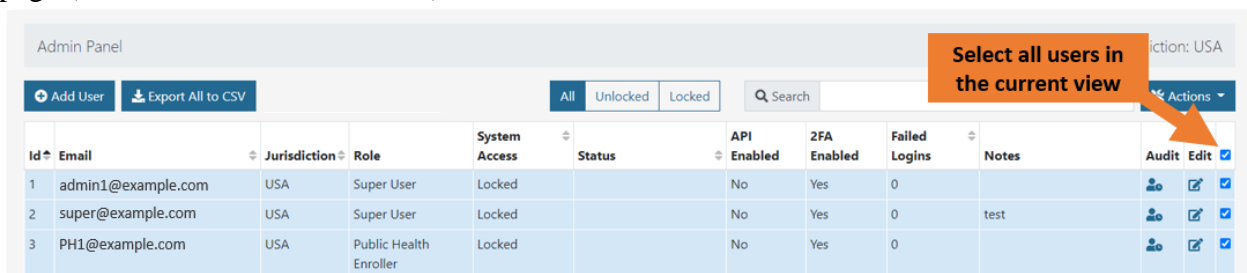


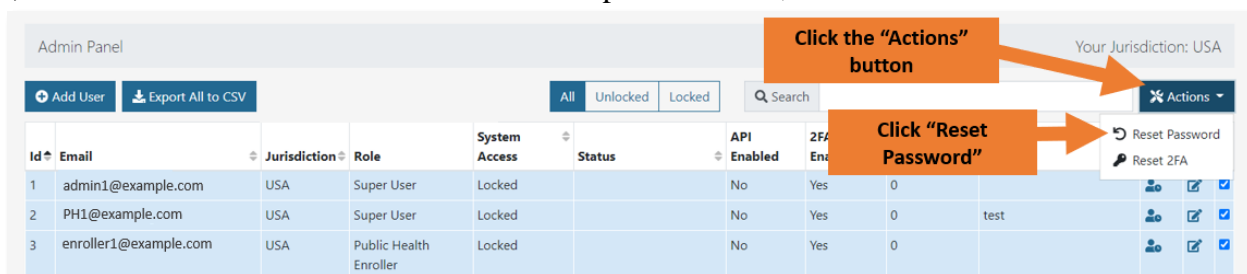
Figure 256: Select the user by clicking the box in the far-right column

2) Clicking the checkbox in the column header will select all rows in the current view on the page (not all rows in the full table).



**Figure 257: Select all users in the view by clicking the checkbox in the column header**

3) Click the “Actions” button and from the drop-down menu, click “Reset Password.”



**Figure 258: Select “Reset Password” from the “Actions” drop-down menu**

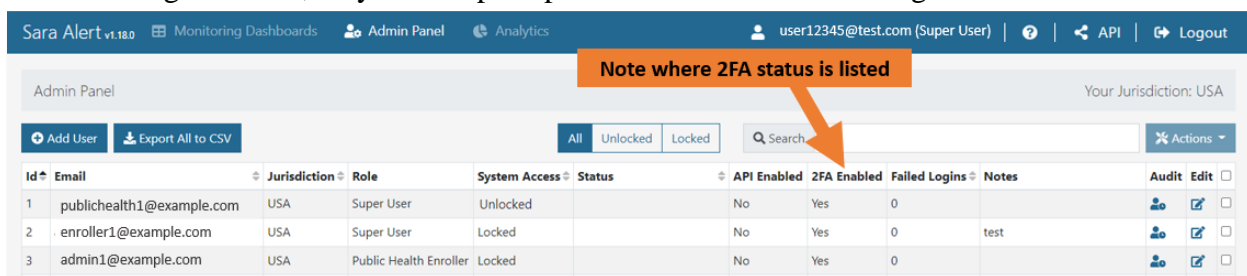
4) The user will receive an email with a temporary password. On their next login, they will be prompted to change their password.

**NOTE:** Temporary passwords expire after 72 hours (and will need to be reissued via another password reset).

## 14.8 How to View Status of 2FA Configuration

Two-factor authentication (2FA) is a requirement for all Sara Alert™ users (not including monitorees) to help maintain the tool’s security. If you click the select box in the menu header, you can reset 2FA for all accounts visible on that page (not all accounts in the system).

The “2FA Enabled” column shows whether a user has configured their required 2FA. If a user has not configured 2FA, they will be prompted to do so on their next login.

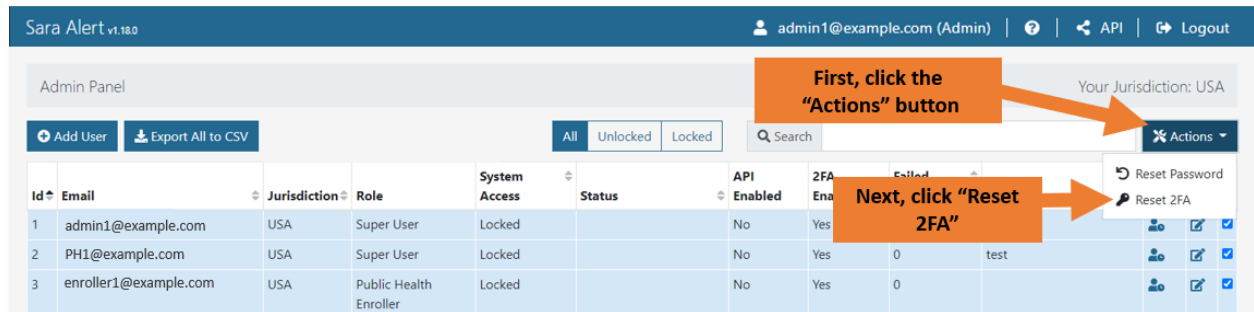


**Figure 259: The Administrator Dashboard shows a user’s 2FA configuration status**

## 14.9 How to Reset Two-Factor Device Pairing

If a user wishes to reset the phone number associated with their Sara Alert™ account (i.e., change the phone that will receive the 7-digit 2FA token), they should notify their jurisdiction's local **Administrator** or **Super User**.

- 1) Select one or more user accounts by clicking the checkbox in the rightmost column.
- 2) Click **“Actions”** and select **“Reset 2FA”** from the drop-down menu. Once reset, the user's “Configured 2-Factor Auth” status will change to “No” and the user will be prompted to register for 2FA on their next login attempt.



**Figure 260: Reset a user's 2FA pairing**

## 14.10 How to Enable API Access

Administrator users can provide API access to specific users in their jurisdiction if they have been approved to do so by the system administrators. For more information on how to gain access to the API, see **The Sara Alert™ API on page 3**.

1) To enable API access, first click the “**Edit**” icon for that user

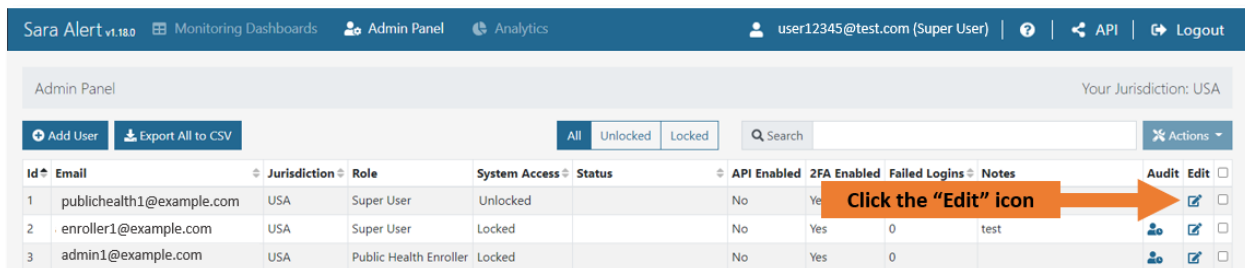


Figure 261: Click the “Edit” icon

2) In the Edit User window, toggle the **API Access** switch to enable or disable access.

The screenshot shows the 'Edit User' window. It contains fields for 'Email Address' (publichealth1@example.com), 'Jurisdiction' (USA), 'Role' (Admin), 'System Access' (Unlocked), 'Status' (Active), 'API Access' (Disabled), and 'Notes' (5000 characters remaining). An orange arrow points to the 'API Access' toggle switch, which is currently set to 'Disabled'. Another orange arrow points to the 'Save' button at the bottom right.

Figure 262: Toggle “API Access” to enable or disable access

## 15 HOW MONITOREES REPORT TO SARA ALERT

Monitorees are individuals who have been enrolled by a trusted **Enroller**, **Public Health Enroller**, **Contact Tracer**, or **Super User** for public health monitoring. Monitorees in the exposure and isolation workflow will receive messages during the monitoring period for as long as they are eligible.

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

Monitorees do not have Sara Alert accounts (e.g., no username and password); while being actively monitored, each monitoree or Head of Household reporter will be sent an automated daily report that is linked to their record(s).

### 15.1 Monitoree Message Summary by Reporting Method

Below is a summary of messages sent to monitorees that are eligible to receive notifications from the system during their preferred contact time by the selected reporting method. Records with “unknown” or “opt-out” do not receive messages so are not included in the summary.

**Table 13: Summary of Messages Sent to Eligible Monitorees by Reporting Method**

	E-mailed Web Link	SMS-Texted Weblink	SMS Text message	Telephone Call
<b>Welcome message<sup>1</sup></b>	Sent immediately following enrollment; includes weblink for daily report.	Sent immediately following enrollment; includes monitoree initials and age, as well as a link to the Sara Alert website/privacy policy.	Sent immediately following enrollment; includes monitoree initials and age, as well as a link to the Sara Alert website/privacy policy.	No welcome message sent
<b>Initial Daily Report Timing</b>	Sent with Welcome Message	Day after enrollment during Preferred Contact Time	Day after enrollment during Preferred Contact Time	During first Preferred Contact Time after enrollment (can be day of enrollment)
<b>Reminder Message sent if no response?</b>	No, one daily request sent	No, one daily request sent <sup>2</sup>	No, one daily request sent <sup>2</sup>	Yes, up to once/hour during preferred contact time <sup>3</sup>
<b>How long does the monitoree have to submit their report?</b>	No limit. Monitorees can report using their weblink at any time.	No limit. Monitorees can report using their weblink at any time.	18 hours from when the text is sent.	N/A (monitorees must answer the phone call to report)
<b>When is the “Monitoring Complete” message sent?<sup>4</sup></b>	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

<sup>1</sup> If the Preferred Reporting Method is initially set to “Unknown” or “Opt-Out” and later updated, the monitoree **will not** receive a welcome message from the system.

<sup>2</sup> The system will make multiple attempts to reach the monitoree if the messages are not successfully delivered by the carrier, but the monitoree will only see one text from the system per day.

<sup>3</sup> Monitorees with a Custom Preferred Contact Time may receive reminder calls every hour for up to four hours after their Preferred Contact Time (up to 5 calls total per day).

<sup>4</sup> Monitoring Complete text messages are only sent for jurisdictions that choose to opt-into this feature.



	E-mailed Web Link	SMS-Texted Weblink	SMS Text message	Telephone Call
<b>Daily Report Format</b>	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
<b>Daily Message Format (Single Monitoree)</b>	Email with single weblink to daily report	A single text that identifies the monitoree by initials and age and includes the weblink to report	Text message with single yes/no response for all symptoms listed	Phone call with single yes/no response for all symptoms listed
<b>Daily Message Format (Reporting Household)</b>	Single email with weblinks for each active household member (denoted by initials and age)	One text for each active household member. Each text identifies the household member by initials and age and includes the weblink to report for that member	Single text message with single yes/no response for all symptoms listed for all active household members	Single phone call with single yes/no question for all active household members
<b>What does a symptomatic report look like? (Single Monitoree)</b>	Specific symptoms shown. See <b>page 33</b> for more details	Specific symptoms shown. See <b>page 33</b> for more details	Report highlighted in red, but specific symptoms unavailable. See <b>page 33</b> for more details	Report highlighted in red, but specific symptoms unavailable. See <b>page 33</b> for more details
<b>What does a symptomatic report look like? (Reporting Household)</b>	Specific symptoms shown for each monitoree in household. See <b>page 32</b> for more details	Specific symptoms shown for each monitoree in household. See <b>page 32</b> for more details	Report highlighted for all household members. Specific symptoms and specific household member that has symptoms unavailable. See <b>page 33</b> for more details	Report highlighted for all household members. Specific symptoms and specific household member that has symptoms unavailable. See <b>page 33</b> for more details

## 15.2 Summary of Messages Sent to Monitorees

### 15.2.1 Language

The language of the monitoree daily reports is determined by the “**Primary Language**” field, which can be set on import, in the enrollment wizard, or by editing the “Identification” section of a record’s Monitoree Details. 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.

### 15.2.2 Automated Daily Report Notification Eligibility

Every day, the system **will send an automated notification containing the daily report** via the monitoree’s preferred reporting method during their monitoring period if eligible.

**NOTE:** A monitoree who is in a household but is not the Head of Household will never receive messages from Sara

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**TIP:** The system can only send phone-based notifications to phone numbers from the U.S., Canada, and Mexico.

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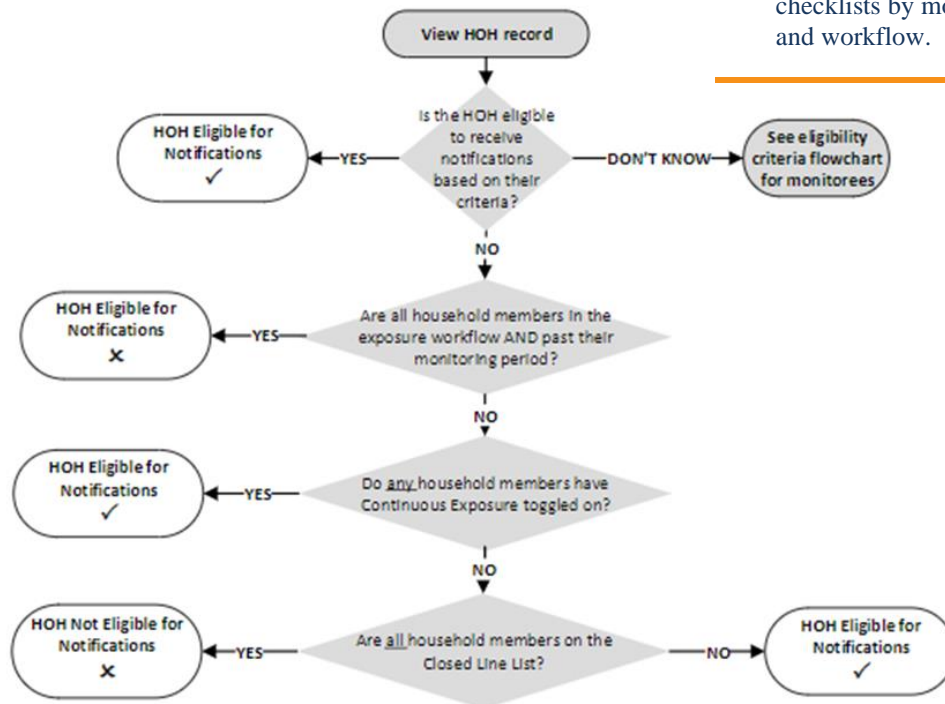
Alert. The Head of Household will receive messages for that monitoree via the Head of Household's preferred reporting method.

To determine if a monitoree is eligible to receive daily notifications, view the notification icon on the dashboard (see **page 75**) or open the monitoree's record and scroll to the "Reports" section. This section contains the information needed to assess a monitoree's notification eligibility.

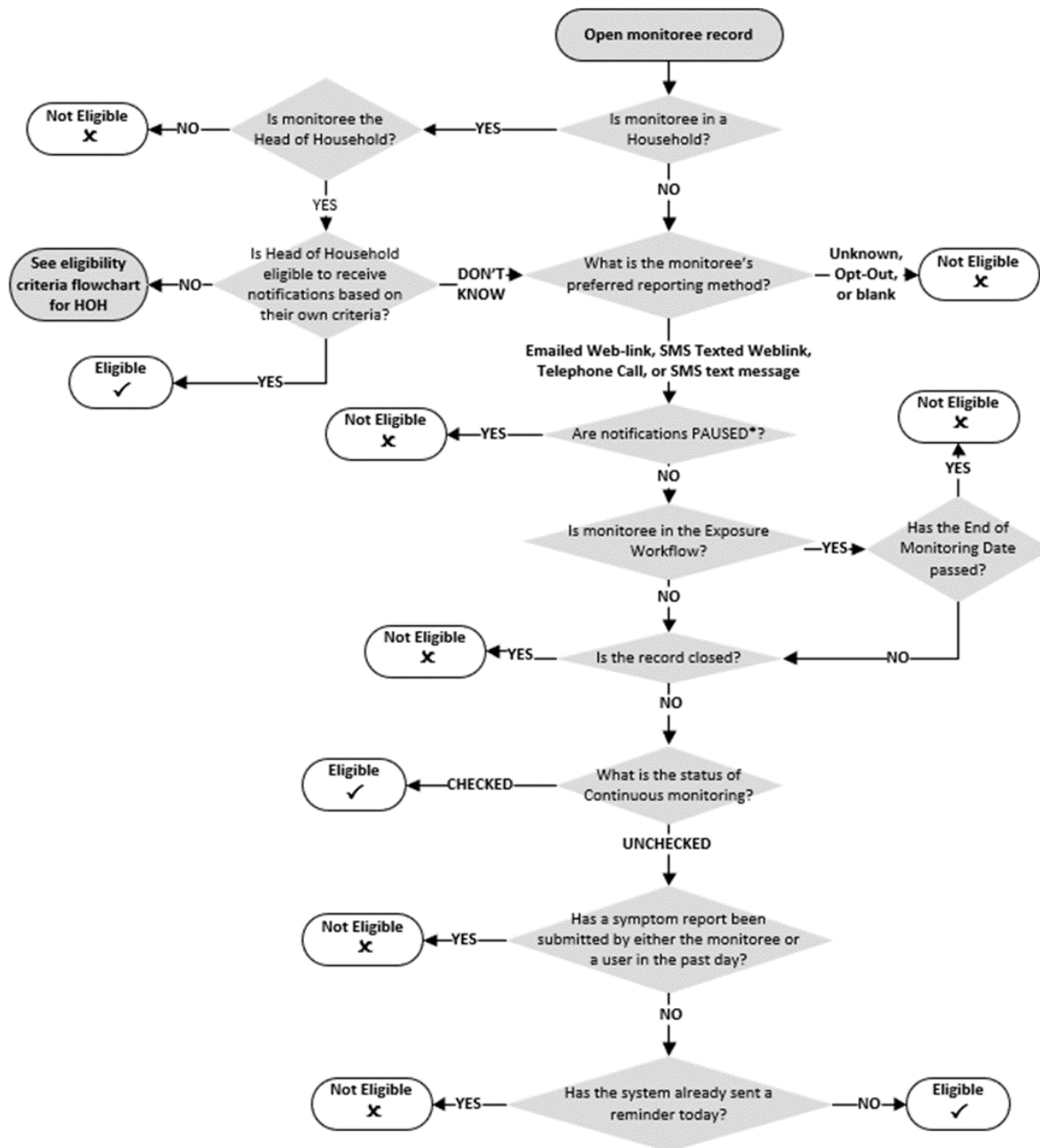
**Figure 263: Eligibility to receive notifications in monitoree details**

The following flowcharts can be used to identify if the system is expected to send the monitoree a notification on a specific day.

**Tip:** See the [Quick Start Guide for Monitoree Notifications](#) for notification eligibility checklists by monitoree type and workflow.



**Figure 264: Guide to Determine Daily Notification Eligibility for Monitorees Who Are A Head of Household**



\*A user cannot Pause/Resume notifications or modify Continuous Exposure for records on the Closed line list

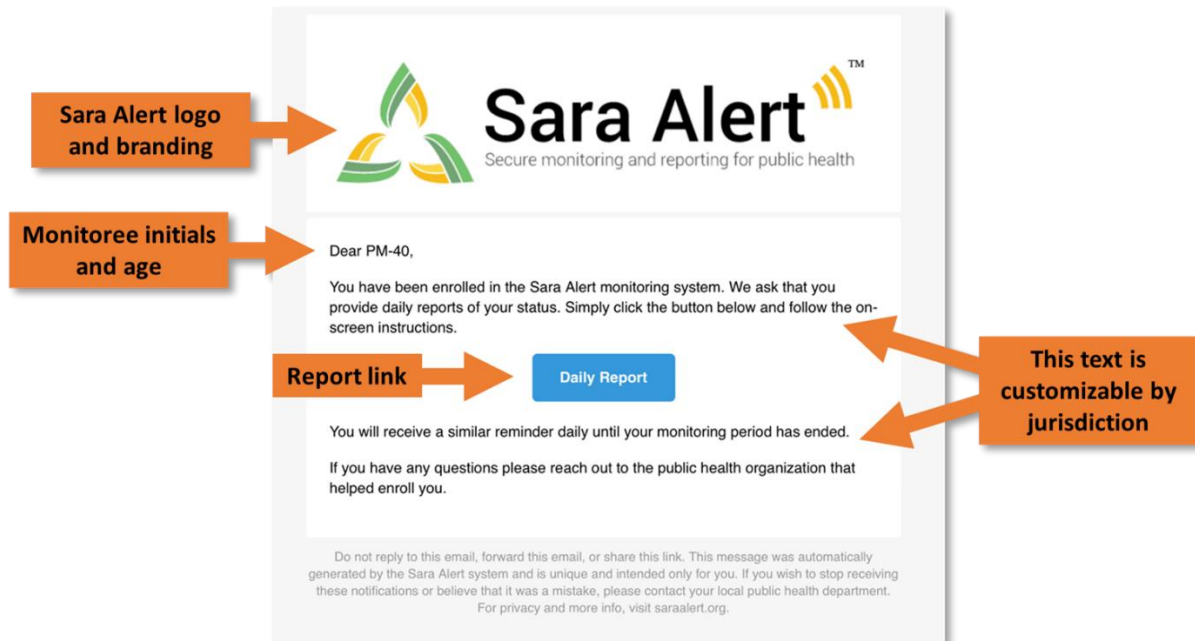
Figure 265. Guide to Determine Daily Notification Eligibility for Monitorees

### 15.2.3 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. The date and time that the welcome message was sent is captured in the History section of the monitoree's record.

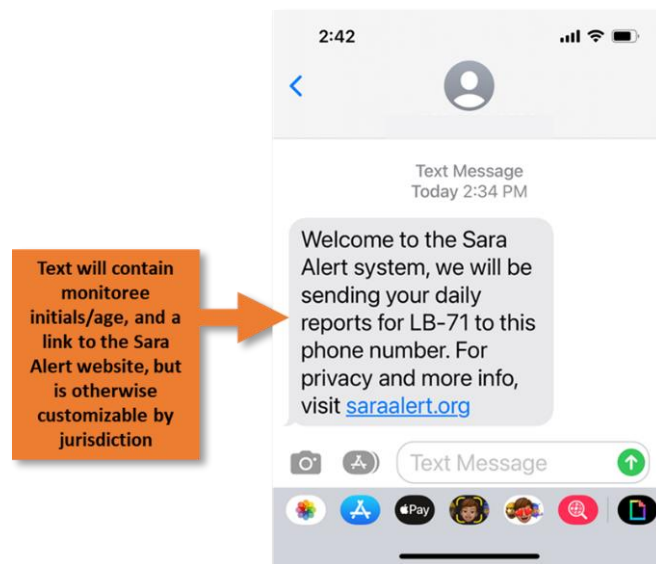
- **Emailed Weblink:** Monitorees who have “E-mailed Web Link” set as the preferred reporting method **at the time of enrollment** will receive an initial welcome notification

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).



**Figure 266: 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 267: 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.

### 15.2.4 Automated Daily Report Message Timing (Email, SMS, and Phone)

It is important to set automated daily reporting expectations with monitorees to ensure compliance with local reporting requirements. If a user **DOES NOT** specify a preferred contact time (i.e., if “Preferred Contact Time” is blank), the system will send automated daily reports during the “Afternoon” contact times until otherwise specified.

- **SMS Messages** (web-link or text): Automated daily report messages will be sent once a day starting with the first preferred contact time period **on the day after enrollment**.
  - **EXAMPLE:** If a monitoree is enrolled at 4 pm EST on June 1, but their preferred contact time is morning, they will receive a welcome message at 4 pm EST on June 1, and then daily report messages every day they are eligible between 8 am – noon EST starting on June 2.
  - **EXAMPLE:** If a monitoree is enrolled at 4 pm EST on June 1, but their preferred contact time is evening, they will receive a welcome message at 4 pm EST on June 1, and then daily report messages every day they are eligible between 4 pm – 8 pm EST starting on June 2.
  - **NOTE:** For **SMS Text Message**, if the monitoree does not respond to their daily report after 18 hours, the system will log a failed contact attempt in the record History. This **does not** represent a second attempt to contact the user. See **page 37**.
- **Email:** The initial daily report will be sent as part of the welcome message with subsequent daily reports sent at the monitoree’s preferred contact time.
- **Telephone Call:** If enrollment occurs during the monitoree’s preferred contact time, the system will send daily report messages every day starting at time of enrollment. If enrollment occurs outside of the monitoree’s preferred contact time, the system will send out daily report messages every day starting during the next preferred contact time period.
  - **EXAMPLE:** If a monitoree is enrolled at 4 pm EST on June 1, but their preferred contact time is morning, they will receive daily report messages every day they are eligible between 8 am – noon EST starting on June 2.
  - **EXAMPLE:** If a monitoree is enrolled at 4 pm EST on June 1, but their preferred contact time is evening, they will receive daily report messages every day they are eligible between 4 pm- 8 pm starting on June 1.

#### 15.2.4.1 Monitoree Time Zone

The “Preferred Contact Time” field is relative to a monitoree’s time zone. The monitoree’s time zone is determined by the following Monitoree Address fields:

- If the monitoree has a “State” entered in the “Address at Destination in USA Where Monitored” section, the monitoree’s time zone is set to that state capital’s time zone.
- If the above field is blank, the “State” entered in the “Home Address Within USA” tab is used. The monitoree’s time zone is set to that state capital’s time zone.
- If both of the above “State” fields are blank, US Eastern Time is used.

### 15.2.5 Automated Reminder Messages by Preferred Reporting Method (Telephone Call Only)

Sara Alert sends automated reminders to monitorees or Heads of Households who report via Telephone Call to improve reporting response rate.

- **Telephone Call:** If the monitoree does not respond to the initial call, Sara Alert will call back hourly—up to four more times that day—until a valid response is logged by the system; the monitoree may receive up to 5 total call attempts each day if they do not respond.
  - If the system does not understand the monitoree or the monitoree responds using different words than “Yes” or “No,” the prompt will be repeated a few times to attempt to collect a valid response before disconnecting. In this scenario, the monitoree will be considered “non-reporting.”
- **Email or SMS Messages** (web-link or text): No reminder messages are sent to monitorees who prefer email or SMS if they do not respond to the daily email within a set period of time; monitorees will receive one message from the system approximately every 24 hours.

### 15.2.6 Monitoring Complete Message

Sara Alert will send a “monitoring complete” message to a self-reporting monitoree or Head of Household only if they are on the asymptomatic line list at the end of their Exposure monitoring period. Monitoring complete messages are sent via text message or email, depending on the monitoree’s preferred reporting method. Monitorees who report by telephone will not receive a monitoring complete message.

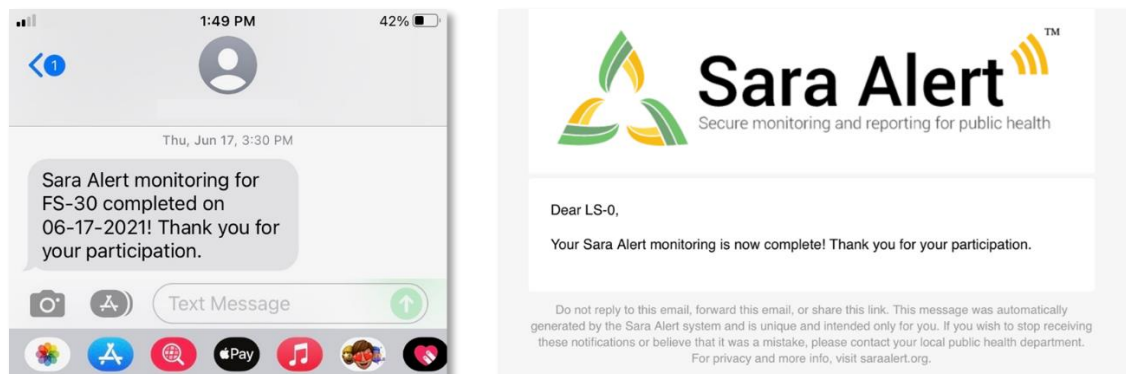


Figure 268: Examples of monitoring complete messages sent by text (left) and email (right)



## 15.2.7 Invalid Responses (Telephone Call and SMS-Text Message)

For monitorees who report via Telephone Call or SMS Text Message there are only two valid responses to their daily report:

- “YES” (or Primary Language equivalent) indicates the presence of any listed symptoms in any household members (if applicable)
- “NO” (or Primary Language equivalent) indicates the absence of all listed symptoms in all household members (if applicable)

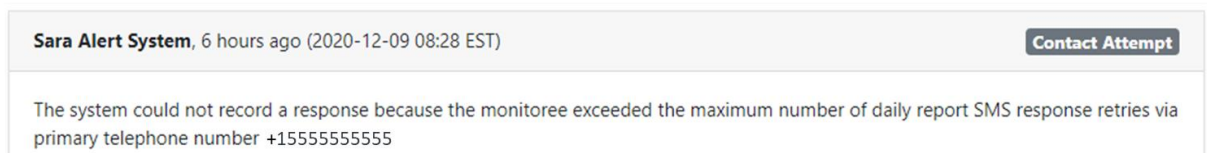
For text messages, the responses are **not** case-sensitive. The system will not allow any other responses. Sara Alert™ handles invalid responses differently depending on the contact method:

- **For Telephone Call:** The automated voice will explain that the monitoree’s answer was not understood and prompt them to try again
- **For SMS Text-Messages:** The system will reply with a text that says “I’m sorry, I didn’t quite get that. Please reply with ‘Yes’ or ‘No.’” **The monitoree must then submit a correct response within one hour** for that day’s report to be logged. If a reply is submitted more than one hour after the message is sent, it will not be recorded by the system.

After four incorrect responses in a single contact attempt, the system will respond with the following message:

*“I’m sorry, you’ve reached the maximum number of response attempts. If you are experiencing a medical emergency, please call 911”*

At this point the monitoree will not be able to submit a report until their next day of monitoring. The History section will record the details:



**Figure 269: The failed contact attempt will appear in the History section**

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

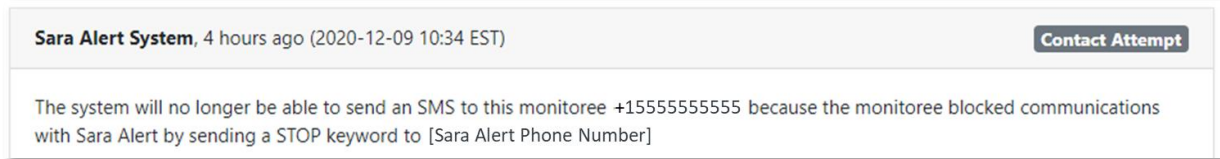
At any time, monitorees can opt-out of Sara Alert SMS monitoring by replying to any SMS-Text Message or SMS Texted Weblink report message with “STOP” (not case sensitive). If a monitoree does this, Sara Alert will no longer be able to send any text messages to that phone number until the monitoree texts “START” to the Sara Alert phone number. Each phone carrier may instruct monitorees to use different opt-in (e.g., START, UNSTOP) or opt-out keywords (e.g., STOP, UNSUBSCRIBE, CANCEL); Sara Alert is able to process industry standard opt-in/opt-out key words.

**NOTE:** Monitorees can still be contacted via Telephone Call using the same phone number if their Preferred Reporting Method is changed to “Telephone Call”.



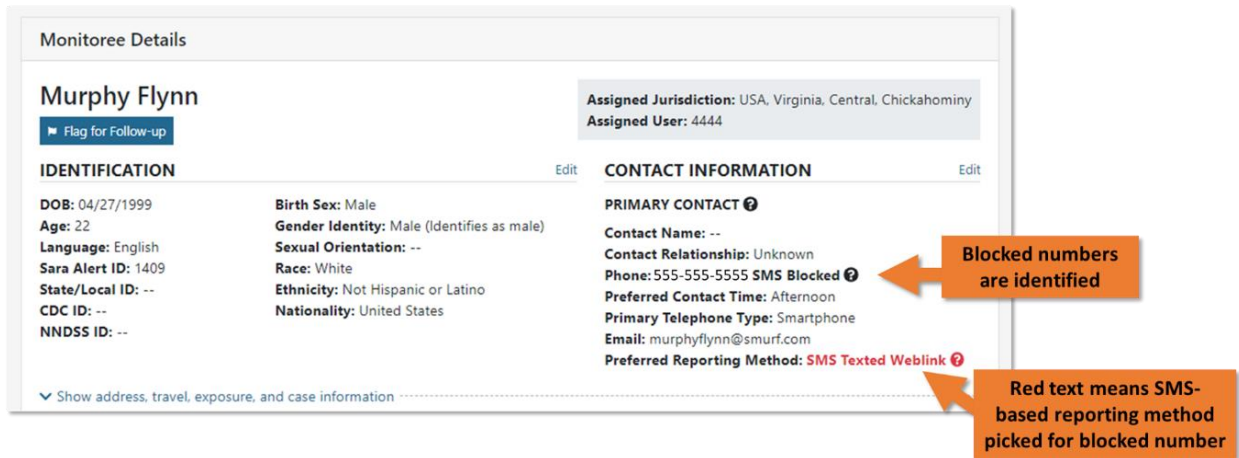
## HOW MONITOREES REPORT TO SARA ALERT

If a monitoree opts out of Sara Alert in this way, the History section will record when the monitoree texted “STOP” or a similar keyword to block the system from sending messages:



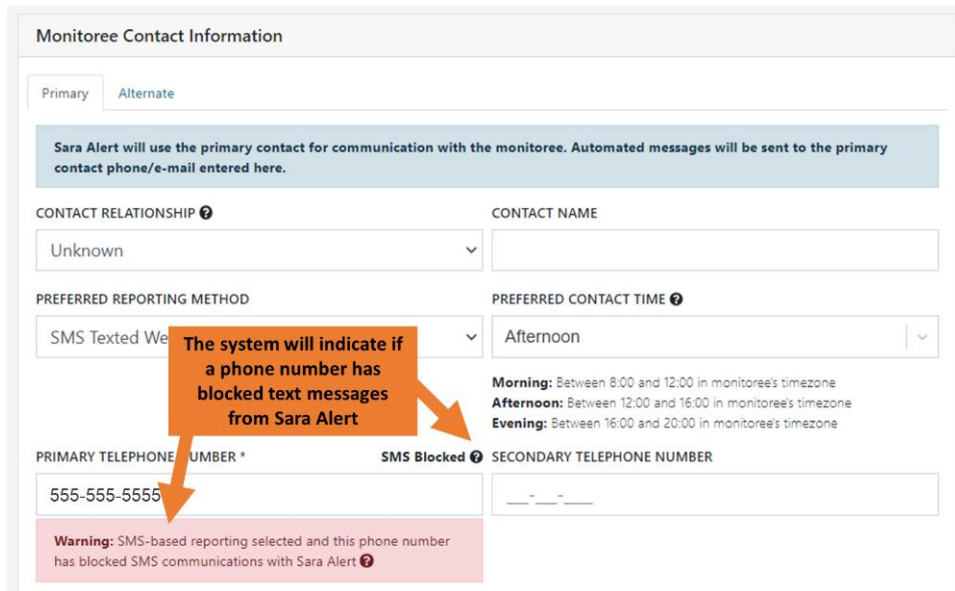
**Figure 270: The History section will show that the monitoree texted “STOP”**

A blocked number will also be indicated in the Monitoree Details section of the monitoree’s record. The text “SMS Blocked” will appear next to the blocked phone number and the preferred reporting method will be displayed in red if an SMS-based method is selected.



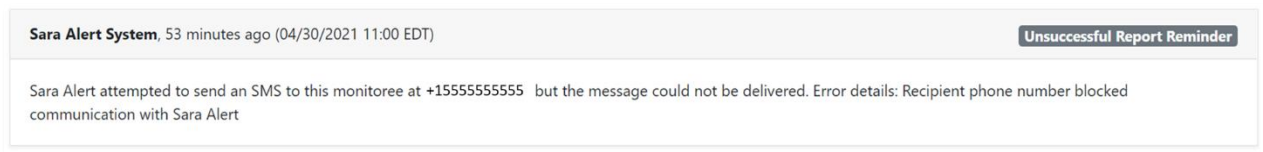
**Figure 271: The History section will show that the monitoree texted “STOP”**

When enrolling or updating a record, including after import, the system will display a warning if you enter a phone number that has blocked text messages from Sara Alert.



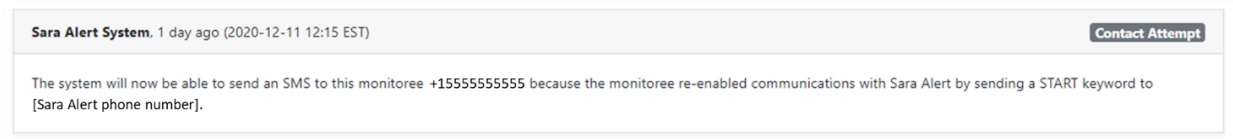
**Figure 272: The Enrollment Wizard will show a warning if you enter a phone number that has blocked Sara Alert**

The history section will document the inability to text the monitoree each day.



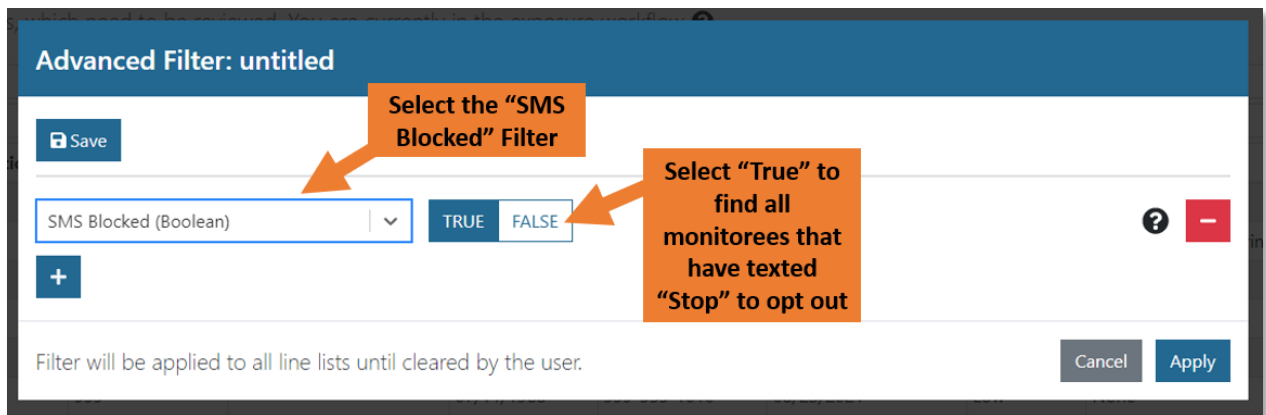
**Figure 273: The History section will document failed attempts to text this monitoree**

If the monitoree subsequently allows texts from Sara Alert by texting “START” or a similar keyword, this will be documented.



**Figure 274: The History section will document the monitoree texting “Start” to re-enable texts**

To find all monitorees that have opted out of Sara Alert this way, you can apply the “SMS Blocked” Advanced Filter.



**Figure 275: Use the “SMS Blocked” Advanced Filter to find all monitorees that have texted “Stop” to Sara Alert**

## 15.3 Submitting Daily Reports to Sara Alert™ (Monitoree Self-Report Screenshots)

Monitorees should be informed what trusted phone number or email sender to expect the daily report messages to come from. To reduce the chance of any successful spoofing attempts, monitorees should be reminded that Sara Alert™ messages will only ask if a monitoree (and any household members) are or are not experiencing symptoms and related questions added by jurisdictions. Sara Alert™ will never ask for other sensitive information, including social security number, account numbers, passwords, or security question responses.

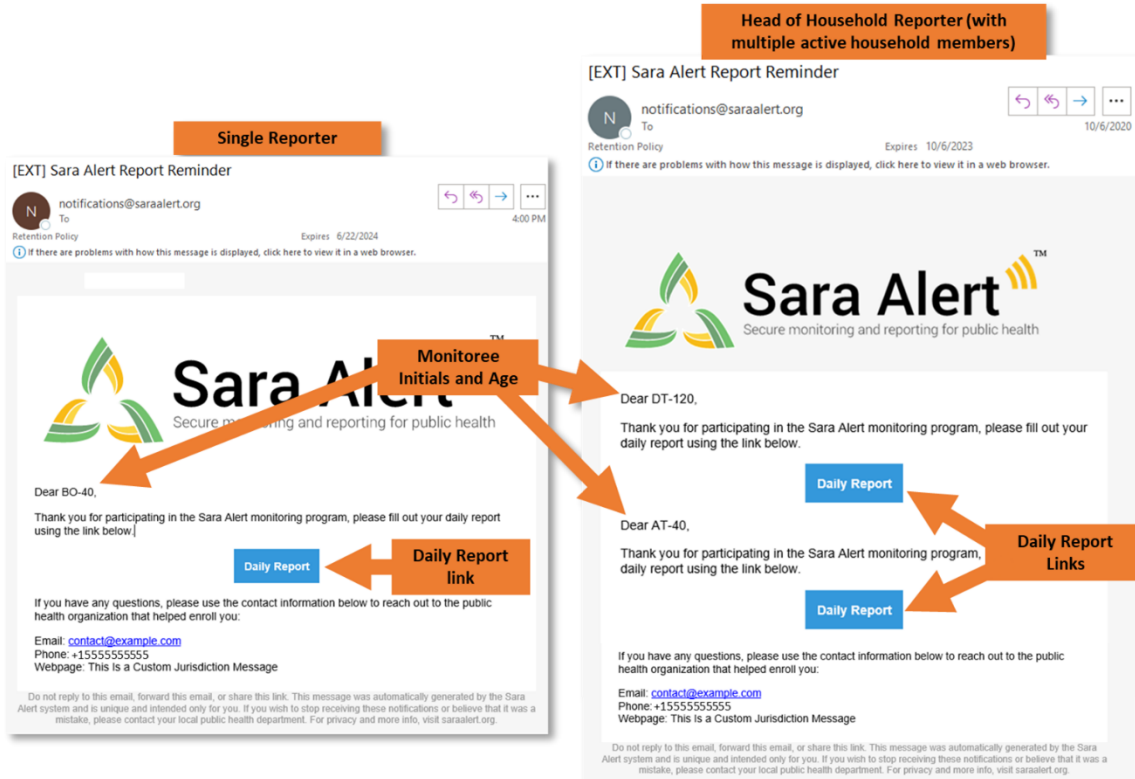
**Tip:** See the [Quick Start Guide for Helping Monitorees with Daily Reports](#)

**NOTE:** Sara Alert™ current supports sending notifications to monitorees in multiple languages (see [page 23](#)).

### 15.3.1 E-mailed Web Link

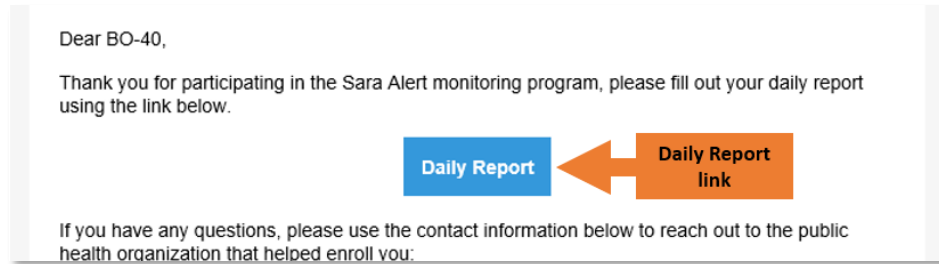
Monitorees who report via E-Mailed Web Link will receive a daily email formatted as shown below. Heads of Households will receive a separate daily text for each active monitoree. The monitoree's age and initials will appear at the end of each weblink as well as at the top of the Daily Report. Email notifications will always come from the same email address. The trusted email address is shared with jurisdictions at the time of onboarding.

**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 276: Example daily symptom request emails sent to monitorees**

1) Monitorees click on the “Daily Report” link to open their daily report:



**Figure 277: Example daily symptom request emails sent to monitorees**

2) The monitoree’s daily report will open in a browser window. The monitoree can then indicate symptoms by checking the corresponding boxes. If a monitoree is **not symptomatic**, they can indicate this by **either**:

- Checking the “**I am not experiencing any symptoms**” box and clicking “**Submit.**”
  - If the “I am not experiencing any symptoms” box has been checked, all other symptom boxes will become uncheckable.
  - If a symptom has been indicated, the “I am not experiencing any symptoms” box becomes uncheckable.
- Leaving all symptom boxes unchecked and clicking “**Submit**”

**NOTE:** The exact appearance of the daily report will differ depending on the monitoree’s internet browser and the disease which is being monitored. The daily report shown below is for COVID-19.

Sara Alert v1.16.0

Daily Self-Report (MM-40) ← Monitoree initials and age

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

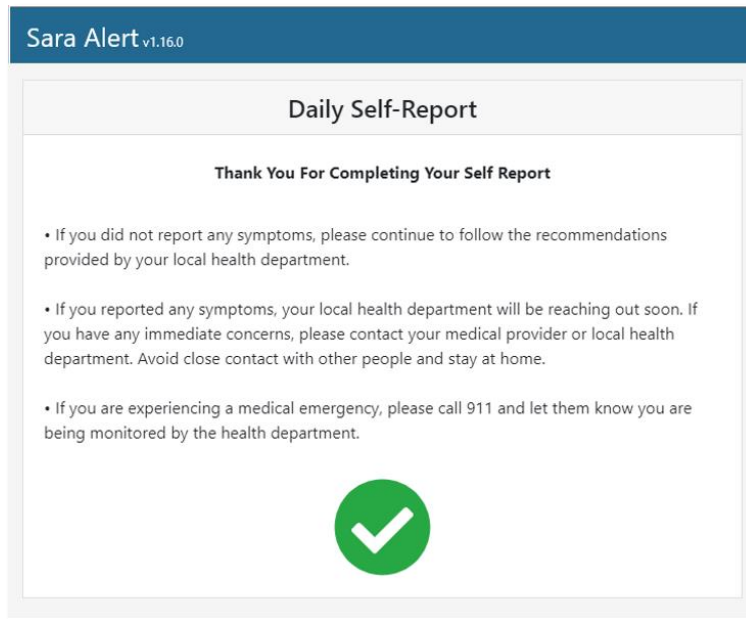
☐ Used A Fever Reducer In the past 24 hours, have you used fevers?

☐ I am not experiencing any symptoms ← Option for no symptoms (monitorees can also leave all boxes unchecked and click Submit to indicate no symptoms)

Click to submit → Submit

**Figure 278: Example daily symptom request emails sent to monitorees**

3) After submitting their report, the monitoree will be shown a message confirming their report was completed. The exact content may differ between jurisdictions.

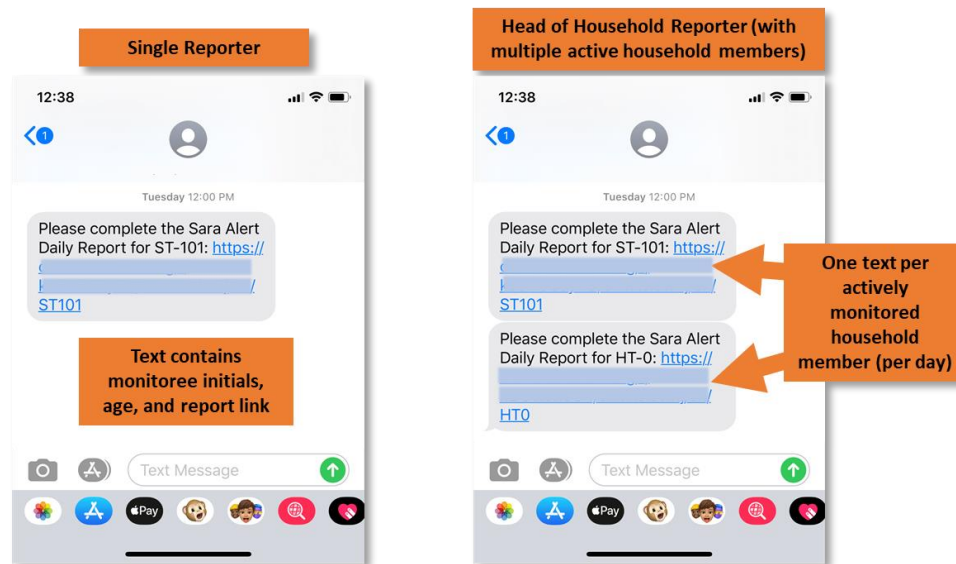


**Figure 279: Confirmation message**

### 15.3.2 SMS Texted Weblink

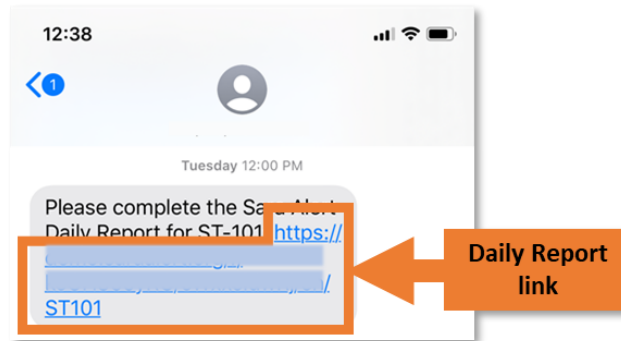
Monitorees who report via SMS Texted Weblink will receive daily text messages as shown below. Heads of Households will receive a separate daily text for each active monitoree. The monitoree's age and initials will appear at the end of each weblink as well as at the top of the Daily Report.

**NOTE:** Exact formatting may vary depending on the phone the monitoree uses.



**Figure 280: Example daily symptom request text messages sent to monitorees**

1) Monitorees click on the daily report link to open their daily report:

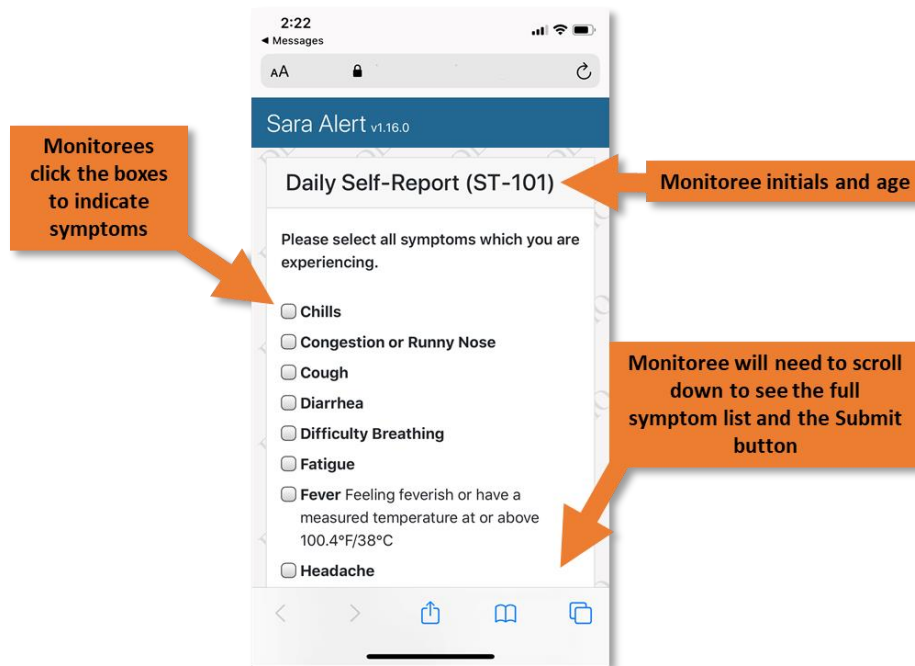


**Figure 281: Daily report link within the text**

2) The monitoree's daily report will open in a browser window. The monitoree can then indicate symptoms by checking the corresponding boxes. If a monitoree is **not symptomatic**, they can indicate this by **either**:

- Checking the “**I am not experiencing any symptoms**” box and clicking “**Submit.**”
  - If the “I am not experiencing any symptoms” box has been checked, all other symptom boxes will become uncheckable.
  - If a symptom has been indicated, the “I am not experiencing any symptoms” box becomes uncheckable
- Leaving all symptom boxes unchecked and clicking “**Submit**”

**NOTE:** The exact appearance of the daily report will differ depending on the monitoree's phone and internet browser. In most cases, monitorees will need to scroll down to access the full symptom list and Submit button. The daily report below is for COVID-19.



**Figure 282: Example daily self-report for someone reporting via SMS Web Link**



3) After submitting their report, the monitoree will be shown a message confirming their report was completed. The exact content may differ between jurisdictions.

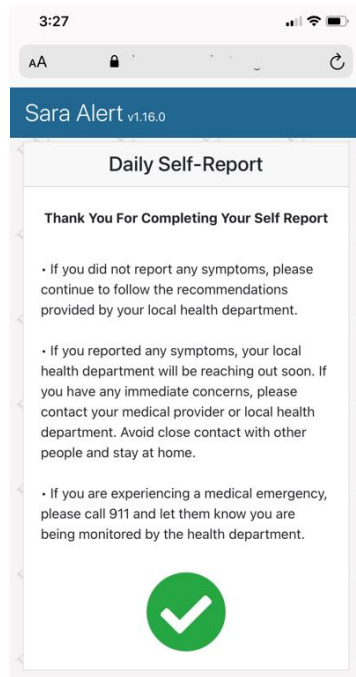


Figure 283: SMS Web Link confirmation message

### 15.3.3 SMS-Text Message

Monitorees who report via SMS Text Message will receive daily text messages as shown below. Heads of Households will receive a single text for all monitorees in their household.

**NOTE:** Exact formatting may vary depending on the phone the monitoree uses. The daily report below is for COVID-19.

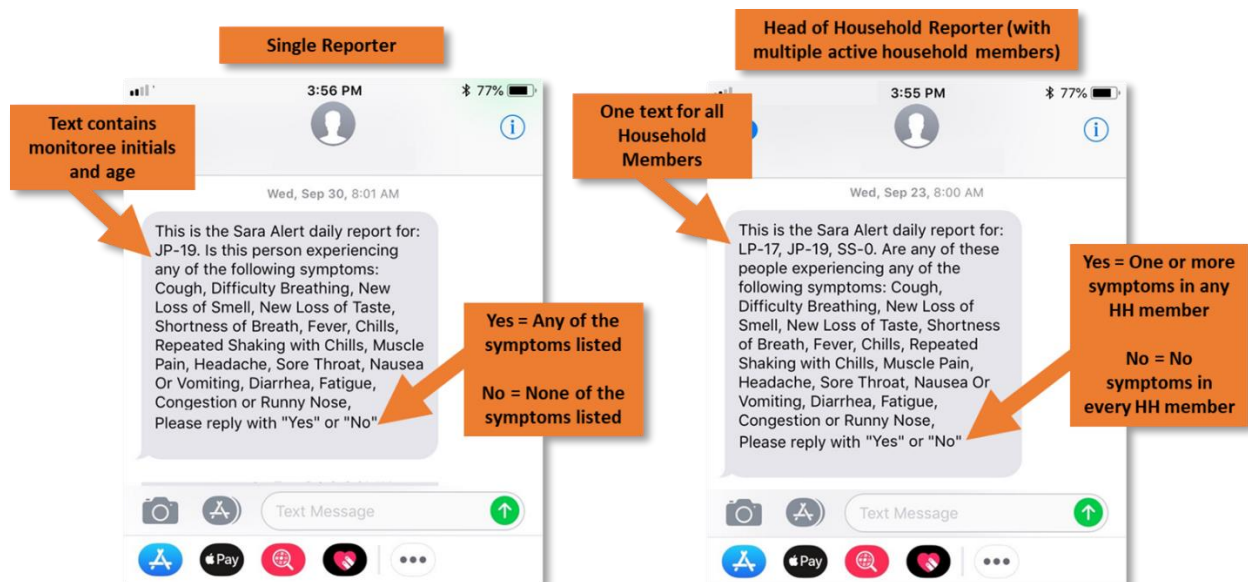


Figure 284: Example daily symptom request text messages sent to monitorees



## HOW MONITOREES REPORT TO SARA ALERT

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

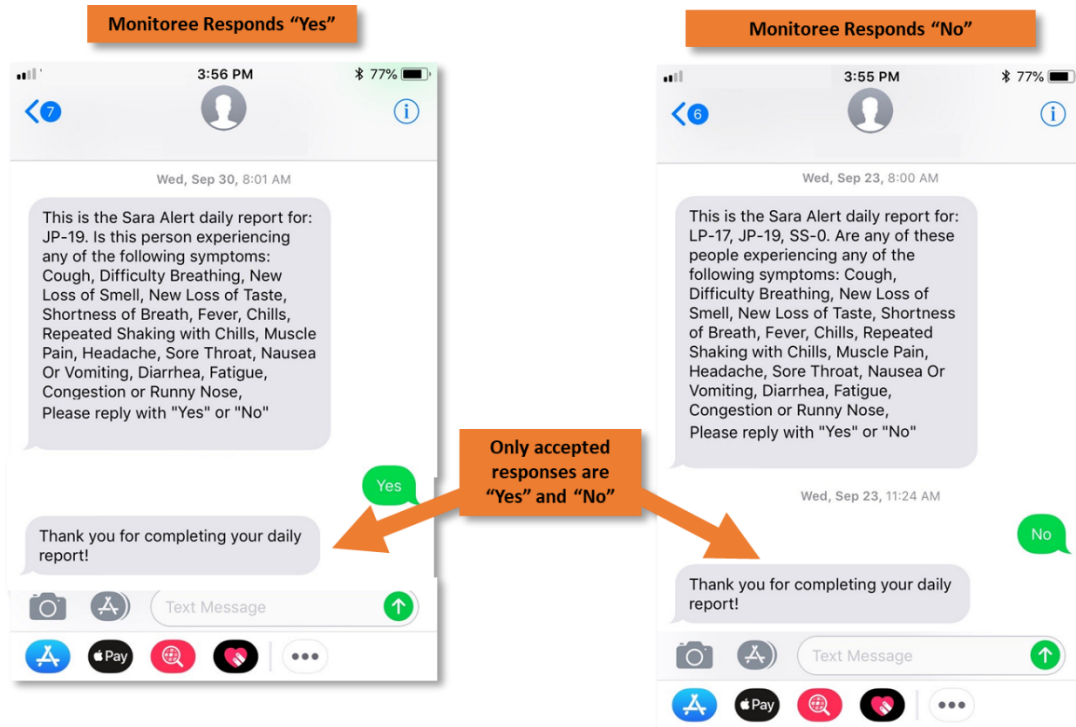


Figure 285: Valid responses to SMS-Text self reports

2) If a monitoree gives an invalid response, they will be prompted again:

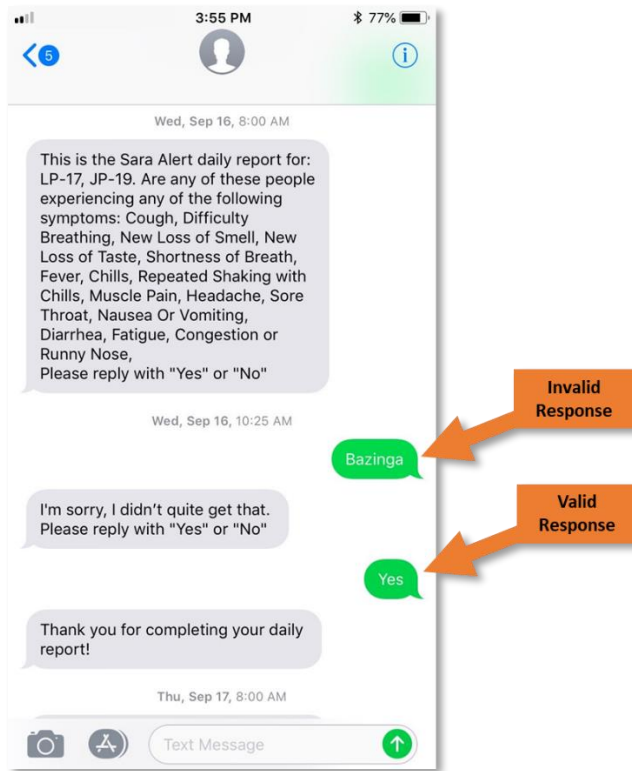


Figure 286: Invalid responses prompt a follow-up

3) If the monitoree continues to provide invalid responses and reaches the maximum number of daily report SMS response retries (4 attempts), the system will inform them they were unable to record a response.

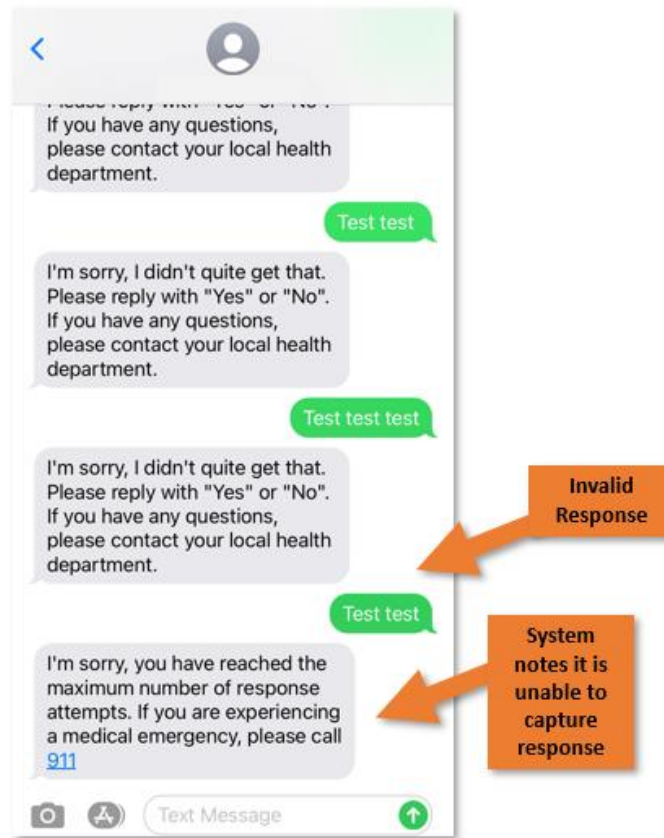


Figure 287: System notes if the monitoree reaches the maximum number of invalid retries

### 15.3.4 Telephone Call

Monitorees who report via Telephone Call will engage in a conversation with “Sara” an automated operator. “Sara” will first introduce herself and identify the, monitorees by initials and age:

*“Hello, this is Sara, the automated public health assistant calling for your daily report. This is the report for:”* [The voice will then list out the monitoree initials and ages]

- **Single reporter (example):** *“Hello, this is Sara, the automated public health assistant calling for your daily report. This is the report for: AB, age 29”*
- **Household (example):** *“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” will then list off the symptoms from the case definition. The following example is for COVID-19:

*“Is this person [or, for households, “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 “Sara” has completed listing the symptoms, she will say:

*“Please reply with ‘Yes’ or ‘No’”*

At this point the monitoree should respond with either:

- “Yes”—indicating the presence of ANY symptoms that were listed in ANY of the individuals who are being monitored
- “No”—indicating the absence of ALL symptoms in ALL individuals being monitored

If the monitoree responds with “Yes” or “No,” “Sara” will reply with:

*“Thank you for completing your daily report! Goodbye.”*

If the monitoree gives **any other response**, “Sara” will prompt the monitoree for another response:

*“I’m sorry, I didn’t quite get that. Let’s try again.”*

After four incorrect responses in a single contact attempt, the system will respond with the following message:

*“I’m sorry, you’ve reached the maximum number of response attempts. If you are experiencing a medical emergency, please call 911”*

At this point the monitoree will not be able to submit a report until their next day of monitoring.

## Appendix A Advanced Filter Fields and Descriptions

**Table A-1. Advanced Filter Fields and Descriptions**

Filter Name	Type	Description	Filter Logic
Active Monitoring	Boolean (True/False)	Select "True" to show only monitorees who are not on the "Closed" line list (and "False" for the opposite).	<b>True Criteria:</b> [Monitoring Status] = "Actively Monitoring"
Address	Combination	Enter any part of a monitoree's address to show only monitorees where that text appears anywhere in their address fields.	<b>True Criteria:</b> Monitoree has at least one address entry where ALL the following (if specified by the user) are true: <ul style="list-style-type: none"> <li>Any of the USA Address fields contain the entered text.</li> <li>Any of the Foreign Address fields contain the entered text.</li> </ul>
Age	Number	Enter an age range to show only monitorees whose current age (based on Date of Birth) is within that range.	<b>True Criteria:</b> [Current Date] – [Date of Birth] is within the specified range of years.
Assigned User	Multi-Select	Select Assigned User number(s) to show monitorees assigned to any of the selected users.	<b>True Criteria:</b> Monitoree is assigned to at least one of the selected Assigned User values.
Close Contact with a Known Case ID	Text	Enter known Case IDs (separating multiple Case IDs with commas) to show monitorees who have values in their "Close Contact with a Known Case" field that <b>contain</b> or <b>exactly match</b> the entered values.	<b>True Criteria:</b> Entered text exactly or partially matches the [Close Contact with a Known Case] field
Common Exposure Cohort	Combination	Specify parameters for a Common Exposure Cohort to show only monitorees who have at least one Common Exposure Cohort entry that meets ALL the specified parameters. A user can specify a cohort type, cohort name/description, and/or cohort location. The user can choose any combination of those three parameters to specify for a single filter.	<b>True Criteria:</b> Monitoree has at least one Common Exposure Cohort entry where ALL the following (if specified by the user) are true: <ul style="list-style-type: none"> <li>[cohort type] matches the specified type.</li> <li>[cohort name/description] matches the specified name or description.</li> <li>[cohort location] matches the specific location.</li> </ul>
Continuous Exposure	Boolean (True/False)	Select "True" to show only monitorees who have Continuous Exposure selected (and "False" for the opposite).	<b>True Criteria:</b> [Continuous Exposure] = "True"
Daily Reporters	Boolean (True/False)	Select "True" to show only monitorees who are a Head of Household or not in a household in Sara Alert (and "False" for the opposite).	<b>True Criteria:</b> Monitoree is a Head of Household <b>OR</b> Monitoree is not in a household (Self-Reporter)
Enrolled	Date Picker	Specify a date range to show only monitorees who were enrolled in that range.	<b>True Criteria:</b> [Enrollment Date] is within the specified date range
Enrolled	Relative Date	Specify a number of days in the past to show only monitorees who were enrolled on, before, or since that date.	<b>True Criteria:</b> [Enrollment Date] is within the specified date range

Filter Name	Type	Description	Filter Logic
Exposure Risk Assessment	Select	Select a Risk Exposure level to show only monitorees who currently have that level selected.	<b>True Criteria:</b> [Exposure Risk Assessment] = Selected Value
Flagged for Follow-up	Select	Select a reason to show monitorees who currently have a Flag for Follow-up with the reason selected.	<b>True Criteria:</b> [Reason for Flag for Follow-up] = Selected Value
Household Member	Boolean (True/False)	Select "True" to show only monitorees who are in a household but are not a Head of Household in Sara Alert (and "False" for the opposite).	<b>True Criteria:</b> Monitoree is in a Household <b>AND</b> Monitoree is <b>NOT</b> a Head of Household
Ineligible for any recovery definition	Boolean (True/False)	Select "True" to show monitorees in the Isolation workflow that are ineligible to meet any recovery definition, and may therefore never reach the Records Requiring Review line list	<b>True Criteria:</b> Monitoree is in the Isolation workflow, does not have both a Symptom Onset Date, and does not have a positive lab result with a Specimen Collection Date
Jurisdiction	Multi-Select	Select Jurisdiction(s) to show monitorees assigned to any of the selected Jurisdictions.	<b>True Criteria:</b> Monitoree is assigned to at least one of the selected Jurisdiction values.
Lab Result	Combination	Specify parameters for a lab result to show only monitorees who have at least one lab result that meets ALL the specified parameters. A user can specify a test type, a specimen collection date range, a report date range, and/or a result. The user can choose any combination of those four parameters to specify for a single filter.	<b>True Criteria:</b> Monitoree has at least one lab result where ALL the following (if specified by the user) are true: <ul style="list-style-type: none"> <li>• [Result] matches the specified result.</li> <li>• [Test Type] matches the specified test type.</li> <li>• [Specimen Collection Date] is within the specified date range.</li> <li>• [Report Date] is within the specified date range.</li> </ul>
Last Date of Exposure	Date Picker	Specify a date range to show only monitorees with a Last Date of Exposure in that range.	<b>True Criteria:</b> [Last Date of Exposure] is within the specified date range
Last Date of Exposure	Relative Date	Specify a number of days in the past or future to show only monitorees who were exposed on, before, or after that date.	<b>True Criteria:</b> [Last Date of Exposure] is within the specified date range
Latest Report	Date Picker	Specify a date range to show only monitorees whose latest report is in that range.	<b>True Criteria:</b> [Latest Report Date] is within the specified date range
Latest Report	Relative Date	Specify a number of days in the past to show only monitorees whose latest report was on, before, or since that date.	<b>True Criteria:</b> [Latest Report Date] is within the specified date range
Manual Contact Attempts	Number	Specify a number of manual contact attempts to show only monitorees who have that number of documented manual contact attempts.	<b>True Criteria:</b> The number of Manual Contact Attempts of the chosen type (Successful, Unsuccessful, or All) is within the specified range
Monitoring Plan	Select	Select a Monitoring Plan to show only monitorees who currently have that Monitoring Plan selected.	<b>True Criteria:</b> [Monitoring Plan] = Selected Value

Filter Name	Type	Description	Filter Logic
Name	Combination	Enter a name to show only monitorees with a first, last, and/or middle name that contains or matches the entered text.	<b>True Criteria:</b> Monitoree has at least one Name entry where ALL the following (if specified by the user) are true: <ul style="list-style-type: none"> <li>[First Name] contains the entered text.</li> <li>[Last Name] contains the entered text.</li> <li>[Middle Name] contains the entered text.</li> </ul>
Never Reported	Boolean (True/False)	Select "True" to show only monitorees who have no Sara Alert reports (and "False" for the opposite).	<b>True Criteria:</b> Number of Monitoree Reports = 0
Notifications Paused	Boolean (True/False)	Select "True" to show only monitorees who have Notifications Paused (and "False" for the opposite).	<b>True Criteria:</b> Notifications are paused
Primary Contact Email	Text	Enter an email address to show only monitorees with an email address that contains the entered text captured in their Primary Contact information.	<b>True Criteria:</b> Entered text exactly or partially matches in the [E-Mail Address] field
Primary Contact Preferred Contact Time	Select	Select a Preferred Contact Time to show only monitorees who have that time selected in their Primary Contact information.	<b>True Criteria:</b> [Preferred Contact Time] = Selected Value
Primary Contact Preferred Reporting Method	Select	Select a preferred reporting method to show only monitorees who have that method selected in their Primary Contact information.	<b>True Criteria:</b> [Preferred Reporting Method] = Selected Value
Primary Contact Telephone Number	Text	Enter a phone number to show monitorees who have values in their "Primary Telephone Number" field that <b>contain</b> or <b>exactly match</b> the entered values. <b>NOTE:</b> Sara Alert ignores all non-numerical characters input into this search filter	<b>True Criteria:</b> Entered digits exactly or partially matches (depending on user selection) the [Primary Telephone Number]
Primary Contact Relationship	Multi-Select	Select Contact Relationship(s) to show monitorees with any of the selected Contact Relationships captured in their Primary Contact information	<b>True Criteria:</b> Monitoree has at least one of the selected Contact Relationship values in their Primary Contact information.
Primary Language	Select	Select a Language to show only monitorees for whom that is the Primary Language. <b>NOTE:</b> Monitorees with a "Blank" Primary Language report in English. These will not appear when filtering for "English."	<b>True Criteria:</b> [Primary Language] = Selected Value
Reported in last 24 hours	Boolean (True/False)	Select "True" to show only monitorees who have a daily report that was created within past 24 hours (and "False" for the opposite). <b>NOTE:</b> This includes reports submitted by a user.	<b>True Criteria:</b> Monitoree has a report with a timestamp in the past 24 hours



# Advanced Filter Fields and Descriptions

Filter Name	Type	Description	Filter Logic
Requires Interpretation	Boolean (True/False)	Select "True" to show only monitorees who have "Requires Interpretation" selected (and "False" for the opposite).	<b>True Criteria:</b> [Interpretation Requirement] = "True"
Sara Alert ID	Text	Enter a Sara Alert ID (the last digits of the record's URL) to show only monitorees with that <b>EXACT ID</b> .	<b>True Criteria:</b> [Sara Alert ID] = Entered Value
Sent Notification in last 24 hours	Boolean (True/False)	Select "True" to show only monitorees who received a notification from Sara Alert within the past 24 hours (and "False" for the opposite).	<b>True Criteria:</b> Sara Alert successfully sent the monitoree a notification in the past 24 hours (does not include failed contact attempts)
SMS Blocked	Boolean (True/False)	Select "True" to show only monitorees who have texted "STOP" in response to a Sara Alert text message and cannot receive messages through SMS-based Preferred Reporting Methods until they text "START."	<b>True Criteria:</b> Monitoree has the "SMS Blocked" badge in their Contact Information
Symptom Onset	Date Picker	Specify a date range to show only monitorees with a Symptom Onset Date in that range.	<b>True Criteria:</b> [Symptom Onset Date] is within the specified date range
Symptom Onset	Relative Date	Specify a number of days in the past or future to show only monitorees whose symptom onset date is on, before, or after that date.	<b>True Criteria:</b> [Symptom Onset Date] is within the relative date range
Unenrolled Close Contact	Boolean (True/False)	Select "True" to show only monitorees who have at least one person listed in their record's Close Contact table who is not enrolled in Sara Alert. Select "False" to show only monitorees where there are no people listed in their record's close contacts table who are not enrolled in Sara Alert (including monitorees with no one listed in their Close Contacts table).	<b>True Criteria:</b> Monitoree has at least one contact in their record's Close Contact table who is not currently enrolled in Sara Alert.
Vaccination	Combination	Specify parameters for a vaccination to show only monitorees who have at least one vaccination that meets ALL the specified parameters. A user can specify a vaccine group, a product name, an administration date, and/or a dose number. The user can choose any combination of those four parameters to specify for a single filter.	<b>True Criteria:</b> Monitoree has at least one vaccination where ALL the following (if specified by the user) are true: <ul style="list-style-type: none"> <li>• [Vaccine Group] matches the specified group.</li> <li>• [Product Name] matches the specified product name.</li> <li>• [Administration Date] is within the specified date range.</li> <li>• [Dose Number] matches the specified dose number.</li> </ul>



## Appendix B Advanced Filter Operator Description

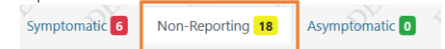


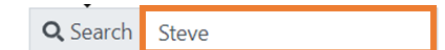





**Table B-1. Advanced Filter Fields and Descriptions**

Operator Name	Type	Description
Today	Relative Date	The current calendar day in the user's time zone.
Tomorrow	Relative Date	The next calendar day in the user's time zone.
Yesterday	Relative Date	The previous calendar day in the user's time zone.
In the Past	Relative Date	<p>The selected number of past days, weeks, or months and up to and including the current date.</p> <p>For data elements that are time stamped by the hour and minute, the filter will return records up to the current date and time. For all other date elements, the filter will return records through the current date.</p>
In the Future	Relative Date	<p>Returns records from the current date and selected number of future days, weeks, or months.</p> <p>For data elements that are time stamped by the hour and minute, the filter will return records from the current date and time going forward. For all other data elements, the filter will return records through the current date.</p>
Within	Date	Within selected calendar dates, including the selected dates
Before	Date	Before the selected date, not including the selected date
After	Date	After the selected date, not including the selected date
Less Than	Number/Relative Date	Less than, but not including the entered value
Less Than or Equal To	Number	Less than the entered number, including that number
Equal To	Number	Exactly the entered number
Greater Than or Equal To	Number	Greater than the entered number, including that number
Greater Than	Number/Relative Date	Greater than, but not including the entered value
Between	Number	Between the entered numbers, including those numbers
Blank (appears as no text)	Date, Combination	Blank. Choosing this option will filter for records where the field is blank.

## Appendix C “Stickiness” of Monitoring Dashboard Filters, Searches, and Settings

In table below: “Yes” = Dashboard setting (row) is preserved (“sticks”) after the action (column) is performed; “No” = Setting is not preserved.

Table C-1: Dashboard Setting “Stickiness” by User Actions

Dashboard Setting	Navigate to a monitoree’s record + click “Return to Dashboard”	Perform a Bulk Action	Refresh the page	Enroll new Monitoree, then click “Return to Dashboard”	Navigate to Analytics or Admin Dashboard, then back to Monitoring Dashboard	Change line lists in same workflow	Navigate to the other workflow
<b>Line List</b> 	Yes	Yes	Yes	Yes	Yes, only if user started from the Exposure Workflow	N/A	N/A
<b>Jurisdiction Filter</b> 	Yes	Yes	Yes	Yes	Yes	Yes	Yes
<b>Assigned User Filter</b> 	Yes	Yes	Yes	Yes	Yes	Yes	Yes
<b>Search Terms</b> 	Yes	Yes	Yes	Yes	Yes	Yes	Yes
<b>Applied <u>Saved</u> Advanced Filter</b> 	Yes	Yes	Yes	Yes	Yes	Yes	Yes
<b># Entries displayed per page</b> 	Yes	Yes	Yes	Yes	Yes	Yes	Yes
<b>Column Sort</b> 	Yes	Yes	Yes	Yes	Yes, only if user started from the Exposure Workflow	Yes, if new line list contains the column	No
<b>Current page number viewed</b> 	Yes	Yes	Yes	Yes	Yes, only if user started from the Exposure Workflow	No	No
<b>Applied <u>Unsaved</u> Advanced Filter</b> 	Yes	Yes	Yes	Yes	Yes	Yes	Yes

## Appendix D Unsuccessful Report History Items

This table describes History Error Details that may be specified for “Unsuccessful Report Reminder” history items. The accuracy and specificity of the error details is dependent on information provided by the phone carrier.

**Table D-1: Error Detail Descriptions for SMS or Telephone Reporting Methods**

History Error Details	Description	Recommended Action
Invalid recipient phone number.	This error occurs when the monitoree’s phone number is incorrectly formatted.	Review the monitoree’s telephone number and ensure it includes 10 digits and the correct area code.
Recipient phone number blocked communication with Sara Alert.	This error occurs when the monitoree or a monitoree’s HoH has texted “STOP” to block texts from Sara Alert.	Refer to your jurisdiction’s guidance for monitorees who block Sara Alert. The monitoree will not be able to receive automated reports from Sara Alert until they text “START” to Sara Alert.
Recipient phone number is in an unsupported region.	This error occurs when the monitoree’s phone number is from a region Sara Alert does not operate in (ex: Antarctica).	If the monitoree plans to remain in the unsupported region for their monitoring period, change their Preferred Reporting Method to E-mailed Web Link.
Recipient phone is off or otherwise unavailable. The system will retry in an hour if it is still in monitoree’s preferred contact period.	This error occurs if the monitoree’s phone was turned off or did not have sufficient signal to receive a notification when Sara Alert tried to contact them.	If error reoccurs frequently, ask monitoree if their phone can be turned on and receive calls and messages during their preferred contact time. If not, consider changing Preferred Reporting Method to E-mailed Web Link.
Recipient may have blocked communications with Sara Alert, recipient phone may be unavailable or ineligible to receive SMS text messages.	<p>This error may occur if:</p> <ol style="list-style-type: none"> <li>1. The monitoree has manually blocked Sara Alert’s telephone number through their phone settings. This method of blocking Sara Alert is different from when a monitoree texts “STOP” and blocks Sara Alert by unsubscribing to our messages.</li> <li>2. Monitoree’s phone does not have sufficient signal</li> </ol>	<ol style="list-style-type: none"> <li>1. Ask monitoree to unblock Sara Alert through their phone settings or switch Preferred Reporting Method to E-mailed Web Link. Because the monitoree has blocked messages through settings, texting “START” will not restart their notifications.</li> <li>2. If the monitoree’s phone cannot receive messages during their preferred contact time, switch Preferred Reporting method to telephone call via landline or E-mailed Web Link.</li> </ol>

History Error Details	Description	Recommended Action
	3. The phone is unable to receive SMS texts	3. If phone is a landline or otherwise unable to receive SMS texts, switch Preferred Reporting Method to telephone call or E-mailed Web Link.
An unknown error has been encountered by the messaging system.	This error occurs when Sara Alert receives a very generic error from the phone carrier with no further details.	If error occurs frequently: <ol style="list-style-type: none"> <li>1. If the monitoree's phone cannot be turned on and receive calls or messages during their preferred contact time, switch Preferred Reporting Method to telephone call via landline (if appropriate) or E-mailed Web Link.</li> <li>2. If the monitoree is using a phone that is roaming off network, this may disrupt delivery of messages. Change Preferred Reporting Method to either a different phone number that is not roaming off network, or to E-mailed Web Link.</li> </ol>
Recipient phone number may not exist, the phone may be off, or the phone is not eligible to receive SMS text messages.	This error occurs if the monitoree's phone number was never or no is longer in service, does not have sufficient signal to receive messages, or has a phone that cannot receive SMS texts.	If the monitoree confirms their phone number is no longer in service or cannot receive SMS texts during their preferred contact time, update the record with an alternative phone number or change Preferred Reporting Method to E-mailed Web Link.
Recipient phone number may not be eligible to receive SMS text messages, or carrier network may be unreachable.	This error may occur if the system attempts to send an SMS text to a landline or an unreachable carrier.	If the monitoree is using a landline, change Preferred Reporting Method to telephone call, or use an alternative phone number that is eligible to receive SMS text messages.
Message has been filtered by carrier network.	This error occurs if Sara Alert's message or call was blocked by the monitoree's phone carrier.	Please contact the Sara Alert Help Desk with the Sara Alert IDs of the monitorees and the associated phone numbers. Please do not send any other identifying information to the Help Desk. Our technical team can help investigate. While we investigate, change "Preferred Reporting Method" to E-mailed Web Link for the monitoree to continue to receive notifications.

This table describes History items with the “Report Email Error” tag.

**Table D-2: History Descriptions for E-mailed Web Link Reporting Methods**

History Error Details	Description	Recommended Action
Error Details are not available for the Preferred Reporting Method of E-mailed Web Link.	This error occurs when an unspecified error (e.g., general network error) occurs when the system attempts to send a report via the E-mailed Web Link Preferred Reporting Method that is beyond a user’s control.	If error occurs frequently, change to an alternative Preferred Reporting Method. Note that an invalid or blank email address will not trigger this type of history item.