



Quick Start Guide for **Enrollers**

1 What data can I access? What actions can I take?

You will only have access to the monitorees you have added to the system, for your jurisdiction.

- Enroll a new exposed monitoree in a jurisdiction
- View enrollment details of exposed monitorees only you have enrolled
- Modify enrollment details of exposed monitorees only you have enrolled
- View overview enrollment statistics by user and user's jurisdiction

2 How do I add a new exposed monitoree?

1. Click the "Enroll New Monitoree" button.
2. Enter information on enrollment screens.
 - To advance, click "Next".
 - To return to a previous screen, click "Previous."
 - Required fields (*) must be completed before advancing.
3. Review enrollment data and save record.
 - Select "Edit" to return to previous enrollment screens.
 - Select "Finish" to save the record. Or, select "Finish and Add a Household Member" if you are adding multiple individuals within the same household.

3 How can I modify an exposed monitoree record?

You will only be able to modify those monitorees that you added to Sara Alert.

1. Search for the monitoree of interest on the Enrolled Monitoree Dashboard.
2. Select the monitoree record by clicking on their name.
3. Select "edit details" to make necessary changes.
4. Review enrollment data and click "Submit" to save the changes.

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CMS Alliance to
Modernize Healthcare
(Health FFRDC)



Sara Alert™

Secure monitoring and reporting for public health

Questions? Contact saraalert@mitre.org

Quick Start Guide for **Analysts**

1 What data can I access ? What actions can I take?

You will only have access to your jurisdiction's analytics summary.

The level of aggregated data (e.g., all states, one state, one local jurisdiction within a state, etc.) is based upon your assigned jurisdiction. You cannot view individual level records.

- View and export analytics

2 What analytics are available?

Analytics are generated using data from both exposure and isolation workflows.

- Current Monitorees by Monitoring Status and Risk Level
- Monitree Flow Over Time (incoming and outgoing)
- Epidemiological Summary of Current and Total Monitorees
- Total Monitorees by Date of Last Exposure by Risk Status
- State and territorial map showing monitorees over time (heat map, with adjustable timeline)

3 How do I view or export the analytics for my jurisdiction?

To View:

1. You will be taken directly to the analytics summary upon login.
 - Some elements on the Analytics Summary can be modified, such as displaying data tables as charts or advancing a timeline on a heat map.
 - These modifications will be reflected if the summary is exported.

To Export (as an image):

1. Select "Export Analysis as PNG"
2. File will appear in Downloads (depending on system settings)

To Export (as a CSV file):

1. Select download button

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saraalert@mitre.org

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FOR A SAFER WORLD**



Quick Start Guide for **Administrators**

1 What data can I access? What actions can I take?

You will only be able to manage Sara Alert users for your assigned jurisdiction. You will not have access to see monitoree records or the analytics summary.

- Add and manage Sara Alert user accounts
- Assign jurisdictions
- Assign or change user roles (public health, enroller, public health enroller or analyst)
- View list of users for your jurisdiction
- Reset password and lock account
- Configure Two-factor auth

2 How do I add a new Sara Alert user?

1. From the Administrator dashboard, select "Add User"
2. Enter the new user's email address
3. Select the user's jurisdiction and role from the drop-down list
4. Click "Add User" to complete the process

3 What are the different roles I can assign?

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Role	Enroll New Monitoree	View/Modify Enrollment Details	View Monitoree Line Lists	View/Add/Modify Symptom Reports	Document Public Health Actions, End Monitoring Period	Transfer Record to Other Jurisdiction	Import records	View and export analytics	Add/modify users	View list of users
Enroller	✓	✓								
Public Health			✓	✓	✓	✓	✓	✓		
Public Health Enroller	✓	✓	✓	✓	✓	✓	✓	✓		
Analyst								✓		
Administrator									✓	✓

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Quick Start Guide for **Public Health Users**

1 What data can I access? What actions can I take?

You will only have access to the monitorees associated with your assigned jurisdiction. Your role allows you to:

- Toggle between Exposure / Isolation Monitoring workflows
- View monitoring line lists of monitorees in assigned jurisdiction
- Modify/view enrollment details of monitorees in jurisdiction, including contact and exposure information
- Manage monitorees, to include:
 - Move monitorees between line lists, view/add/modify daily symptom reports, add comments, document public health actions, transfer monitoree to another jurisdiction, end monitoring period
- View and export analytics summary for monitorees in jurisdiction
- Batch import new monitorees
- Export monitoree records



Exposure Monitoring

- Enrolled by public health because of potential exposure
- Monitorees receive notifications to submit daily symptom report during monitoring period

2 What does each exposure dashboard line list represent?

Monitorees will appear on a line list if they meet criteria for that list. Regardless of status, all monitorees will appear on "All Monitorees" list.

Symptomatic (Active Monitoring): Reported at least one symptom which needs review by a public health user (once reviewed, monitoree record will move to another line list, either asymptomatic or non-reporting). Receives daily notifications.

Non-Reporting (Active Monitoring): Have not reported within expected time period (e.g., 24 hours). Do not have any symptom reports that require review. Receives daily notifications.

Asymptomatic (Active Monitoring): Have reported an absence of symptoms within expected time period OR reported a symptom within expected time period but public health determined symptom not clinically compatible. Receives daily notifications.

PUI (Active Monitoring): Currently under active investigation; a public health action has been documented in the record to move it to PUI line list. Does not receive daily notifications.

Closed (Not Monitoring): No longer being monitored (e.g., completed monitoring period, lost to follow-up, etc.). Sara Alert automatically moves cases to closed after the monitoring period expires. Does not receive daily notifications.

Transfer In: Has been transferred from another jurisdiction within the last 24 hours. Will also show on the appropriate "Active Monitoring" (symptomatic, asymptomatic, non-reporting, PUI) or "Closed" line list, depending upon record values.

Transfer Out: Has been transferred to another jurisdiction. Original jurisdiction will no longer have access to record details. Will remain on this line list for 14 days and will not appear on any other line lists for the original jurisdiction.

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Quick Start Guide for **Public Health Users**

1 What data can I access? What actions can I take?

- You will only have access to the monitorees associated with your assigned jurisdiction. Your role allows you to:
- Toggle between Exposure / Isolation Monitoring workflows
 - View monitoring line lists of monitorees in assigned jurisdiction
 - Modify/view enrollment details of monitorees in jurisdiction, including contact and exposure information
 - Manage monitorees, to include:
 - Move case between line lists, view/add/modify daily symptom reports, add comments, document lab results, transfer case to another jurisdiction, end monitoring period
 - View and export analytics summary for monitorees in jurisdiction
 - Batch import new case
 - Export case records

2 What does each isolation dashboard line list represent?

Monitorees will appear on a line list if they meet criteria for that list. Regardless of status, all monitorees will appear on "All Cases."



COVID-19 Recovery Definition

- Two negative lab results AND at least 24 hours since last report of fever without fever-reducing medication
- More than 7 days since onset of symptoms AND 72 hours since resolution of fever without fever-reducing medication

Records Requiring Review (Active Monitoring): Have preliminarily met the recovery definition and require review by a public health user (once confirmed, user can move monitoree record to closed). Does not receive daily notifications.	Non-Reporting (Active Monitoring): Have not reported monitoring observations within expected time period (e.g., 24 hours) and have not met the recovery definition. Receives daily notifications.	Reporting (Active Monitoring): Have reported (either symptoms or no symptoms) within expected time period and have not met the recovery definition. Receives daily notifications.	All Cases: Shows <u>all</u> monitorees in the jurisdiction who are currently being monitored while in isolation.
Closed (Not Monitoring): No longer being monitored. Sara Alert does not automatically close records requiring review. Daily notifications will stop.	Transfer In: Has been transferred from another jurisdiction within the last 24 hours. Will also show on the appropriate "Active Monitoring" (records requiring review, non-reporting, or reporting) or "Closed" line list, depending upon record values.	Transfer Out: Has been transferred to another jurisdiction. Original jurisdiction will no longer have access to record details. Will remain on this line list for 14 days but will not appear on any other line lists for the original jurisdiction.	All questions, issues, and feature requests should be submitted via email to the Sara Alert Help Desk. Emails are monitored Monday-Friday, 8am-5pm EDT saraalert@mitre.org



Possible Scenarios for **Exposure Monitoring**



Scenario	Starting Tab	Ending Tab	Action
Monitoree should be monitored by another jurisdiction (<i>Note: Users from your jurisdiction will lose access to details of this record once transferred. We recommend exporting record info before transferring monitorees.</i>)	Symptomatic, Non-Reporting, Asymptomatic, PUI, or Closed	Transferred Out	<ol style="list-style-type: none"> Open monitoree record Change "Assigned Jurisdiction" to the new jurisdiction (from drop down list) Click "Change Jurisdiction" to save change (will automatically move record to new jurisdiction)
Manually close record from active monitoring (<i>Note: The system will not send request to monitorees for daily symptom report once closed.</i>)	Symptomatic, Non-Reporting, Asymptomatic, PUI, Transferred In	Closed	<ol style="list-style-type: none"> Open monitoree record Change "Monitoring Status" from "Actively Monitoring" to "Not Monitoring" Document reason for change Click "Submit" to save the change
Monitoree report of symptoms has been evaluated by public health and person is now under investigation for disease of concern	Symptomatic, Non-Reporting	PUI	<ol style="list-style-type: none"> Open monitoree record Change "Latest Public Health Action" to any value other than "None" Document reason for change Click "Submit" to save the change
Public Health user contacts monitoree who has not reported to Sara Alert in >24 hours; public health user has obtained daily report information and needs to add it to record	Non-Reporting	Symptomatic or Asymptomatic based on values of reported symptoms	<ol style="list-style-type: none"> Open monitoree record Click "Add new" report Complete report Click "Submit" to save report
Monitoree symptom report has been evaluated and public health determines symptoms not clinically compatible (e.g., inaccurate report, explained by other causes)	Symptomatic	Asymptomatic or Non-reporting	<ol style="list-style-type: none"> Open monitoree record Click "Mark All as Reviewed" or "Review" in reports section Document reasoning Click "Submit" to save the change
Monitoree does not report directly to Sara Alert through web-link, SMS text, or automated voice call. Public health contacts monitoree through other means (call to monitoree, home visit, etc.) and needs to add report information.	Symptomatic, Non-Reporting, Asymptomatic, PUI	Symptomatic or Asymptomatic based on values of reported symptoms	<ol style="list-style-type: none"> Open monitoree record Click "Add New Report" Complete report Click "Submit" to save report
User wants to pause or resume daily symptom report notifications.	Symptomatic, Non-Reporting, Asymptomatic	Same as starting tab	<ol style="list-style-type: none"> Open monitoree record Select Pause Notifications or Resume Notifications
Users wants to document contact attempt to monitoree	Symptomatic, Non-Reporting, Asymptomatic, PUI	Same as starting tab	<ol style="list-style-type: none"> Open monitoree record Select "New Contact Attempt" Select "Successful" or "Unsuccessful"

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Possible Scenarios for **Isolation Monitoring**



Scenario	Starting Tab	Ending Tab	Action
Case should be monitored by another jurisdiction <i>(Note: Users from your jurisdiction will lose access to details of this record once transferred. We recommend exporting record info before transferring monitorees.)</i>	Records Requiring Review, Non-Reporting, Reporting, or Closed	Transferred Out	<ol style="list-style-type: none"> 1. Open case record 2. Change "Assigned Jurisdiction" to the new jurisdiction (from drop down list) 3. Click "Change Jurisdiction" to save change (will automatically move record to new jurisdiction)
PUI in exposure monitoring workflow is confirmed as a case. Sara Alert will be used to monitor case until recovery definition met.	PUI (Exposure Workflow)	Reporting or Non-Reporting (Isolation Workflow)	<ol style="list-style-type: none"> 1. Open case record 2. Change "Case Status" to "Confirmed" or "Probable" 3. Choose "Continue Monitoring in Isolation Workflow" 4. Click "Submit"
Case meets the recovery definition. <i>(Note: The system will not send requests to cases on the records requiring review line list.)</i>	Records Requiring Review	Closed	<ol style="list-style-type: none"> 1. Open case record 2. Confirm case has recovered 3. Change "Monitoring Status" from "Actively Monitoring" to "Not Monitoring" 4. Select "Meets criteria to discontinue isolation" 5. Click "Submit" to save
Manually close record from active monitoring <i>(Note: The system will not send request to monitorees for daily symptom report once closed.)</i>	Records Requiring Review, Non-Reporting, Reporting, Transferred In	Closed	<ol style="list-style-type: none"> 1. Open case record 2. Change "Monitoring Status" from "Actively Monitoring" to "Not Monitoring" 3. Document reason for change 4. Click "Submit" to save
Public Health user contacts case who has not reported to Sara Alert in >24 hours; public health user has obtained daily report information and needs to add it to record	Non-Reporting	Reporting	<ol style="list-style-type: none"> 1. Open case record 2. Click "Add New Report" 3. Complete report 4. Click "Submit" to save
Case does not report directly to Sara Alert through web-link, SMS text, or automated voice call. Public health contacts case through other means (call to monitoree, home visit, etc.) and needs to add report information.	Non-Reporting	Records Requiring Review, Reporting	<ol style="list-style-type: none"> 1. Open case record 2. Click "Add New Report" 3. Complete report 4. Click "Submit" to save
User wants to pause or resume daily symptom report notifications.	Records Requiring Review, Non-Reporting, Reporting	Same as starting tab	<ol style="list-style-type: none"> 1. Open case record 2. Select Pause Notifications or Resume Notifications
Users wants to document contact attempt to case	Symptomatic, Non-Reporting, Asymptomatic, PUI	Same as starting tab	<ol style="list-style-type: none"> 1. Open case record 2. Select "New Contact Attempt" 3. Select "Successful" or "Unsuccessful"

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