



SimpleReport

user guide



version 1.3 – 8.13.2021

Getting started	3
Onboard your organization	3
Request access for your organization	3
Verify your identity	3
(optional) Get training	4
Activate your user account	4
Multi-factor authentication options	5
Log in to SimpleReport	7
Get training	8
Using SimpleReport	8
Select your testing facility	8
Conduct and submit tests	9
Backdate a test	12
Manage results	13

Review results	13
Print someone's test results	14
Correct a previous test result	15
Manage people you test	16
Self-registration	16
Add a new person	17
Archive a person	19
Update someone's profile	19
Manage users	20
Manage user permissions	20
Invite new users	21
Manage facility info	22
Add a facility	22
Update facility settings	24
Contact us	25

Getting started

Onboard your organization

Welcome to SimpleReport! Let's get started.

Onboarding checklist

Complete the following steps to start using SimpleReport:

- ☐ Request access for your organization
- ☐ Verify your identity
- ☐ (optional) Get training

Request access for your organization

To get access, fill out the [SimpleReport organization access request form](#).

Make sure that the organization name that you enter in the form is accurate, since this is the name that SimpleReport will share with your public health department.

Verify your identity

Once you've filled out the organization access request form, you'll answer identity verification questions online with our verification partner, Experian. This takes just a few minutes.

If Experian is unable to verify your identity, you'll need to schedule a separate video call. During the call, you'll be asked to show two forms of ID to verify your identity. We recommend a driver's licence and a work ID, or you can use any of the [documents on this list](#).

Your SimpleReport account will be accessible after your identity is verified. You'll simply activate and log in to your account.

(optional) Get training

Learn how to use SimpleReport:

- Check out the [SimpleReport training site](#) to practice using the tool using sample data.
- Watch these [quick training videos](#)
- Check out our step-by-step instructions for [using SimpleReport](#)

Add testing facilities and staff: Once you're all set up in SimpleReport you can [invite other staff members](#) or [add more facilities](#).

Activate your user account

You'll receive an email from SimpleReport asking you to activate your account. Once you've set up your account, you can [invite members of your team to SimpleReport](#).

Once you receive the email, follow these steps:

1. Click the green **Activate your SimpleReport account** button. You'll need to click the button within 7 days of receiving the invitation, or else it will expire.



2. On the page that appears, you'll need to pick:
 - A secure password
 - A forgot password question
 - A security image

These all help to keep your account secure.

3. Click **Create My Account** at the bottom right of the page.
4. [Pick a multi-factor authentication option](#), and click **Setup** below it. These authentication options, too, are meant to secure your account. For most users, SMS authentication is the easiest option, because it sends a text message to your phone. (If you choose biometric authentication, make sure that you'll only log in to SimpleReport from the device you're currently using. Biometric authentication may be difficult to use across multiple devices.) Below, you can review instructions for setting up [SMS authentication and Google Authenticator/Okta Verify](#).
5. Click the **Finish** button at the bottom of the registration page. The page will confirm that you've successfully set up your multi-factor authentication, and you'll get a confirmation email, too.

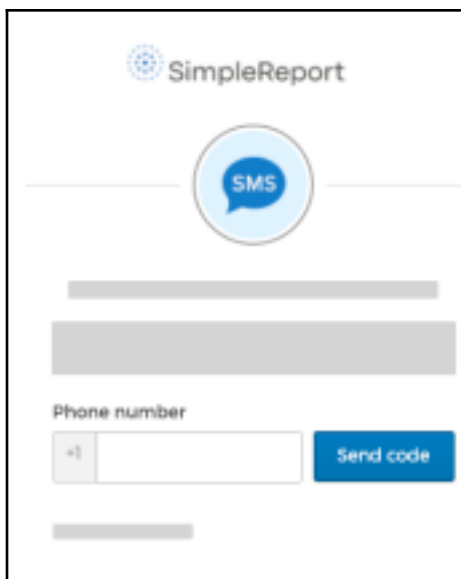
You can now log in to SimpleReport.

Multi-factor authentication options

If you choose SMS or Google Authenticator/Okta Verify as your multi-factor authentication, follow the instructions below to get set up.

SMS authentication

1. Enter your phone number, then click **Send code**. (Make sure to click **Send code**, or you won't be able to continue.)

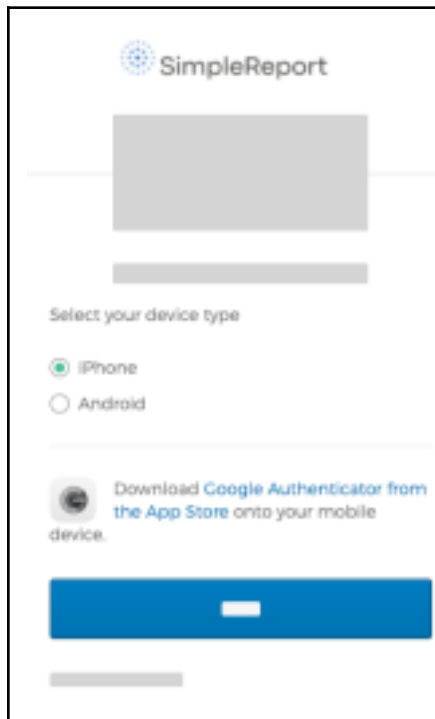
The screenshot shows the SimpleReport SMS authentication setup interface. At the top is the SimpleReport logo. Below it is a blue circular icon with a white speech bubble containing the text 'SMS'. Underneath the icon are two horizontal grey bars representing input fields. Below these is the label 'Phone number' followed by a small dropdown menu showing '+1' and a text input field. To the right of the input field is a blue button labeled 'Send code'. At the bottom of the form is another horizontal grey bar.

2. Check your text messages for a 6-digit authentication code.
3. Enter the code in the **Enter Code** field, then click **Verify**.

Google Authenticator or Okta Verify

1. Select the kind of phone that you use (either iPhone or Android). You'll be asked to download an app.

Download it on your phone and wait for it to install. (The page on your device might vary a bit from the screenshot below, based on your device type and whether you chose Google Authenticator or Okta Verify.)



2. Once the app is installed, click **Next**.
3. Open the app and scan the QR code that appears on your SimpleReport registration page. Once you've successfully scanned the QR code, click **Next**.



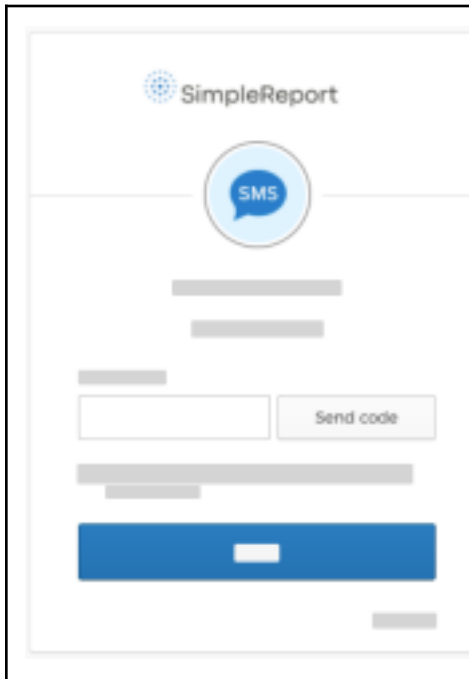
4. Back on your phone, the app will show you a code. Enter the code on the registration page, then click **Verify**. (The code changes regularly, so you'll need to check the app each time you log in to SimpleReport.)

Log in to SimpleReport

Once you've activated your account, you can log in and start using SimpleReport.

To log in:

1. Go to SimpleReport.gov and click **Log in** at the top right corner of the page.
2. Enter your username and password.
3. You'll need to use the multi-factor authentication option that you set up when you registered your account. Here's an example of what you'll need to do if you set up SMS authentication:
 - a. Click the gray **Send code** button to have the verification code sent to your phone. (Make sure to click the button, or else the code won't get sent.)



- b. Once you receive the text, enter the code in the **Enter Code** field.
- c. Click **Verify**.

4. If your organization has multiple testing facilities, select yours from the choices shown.

Once you've successfully logged in, you can do a number of tasks, like [conduct a test](#) or [add a new person to](#)

Get training

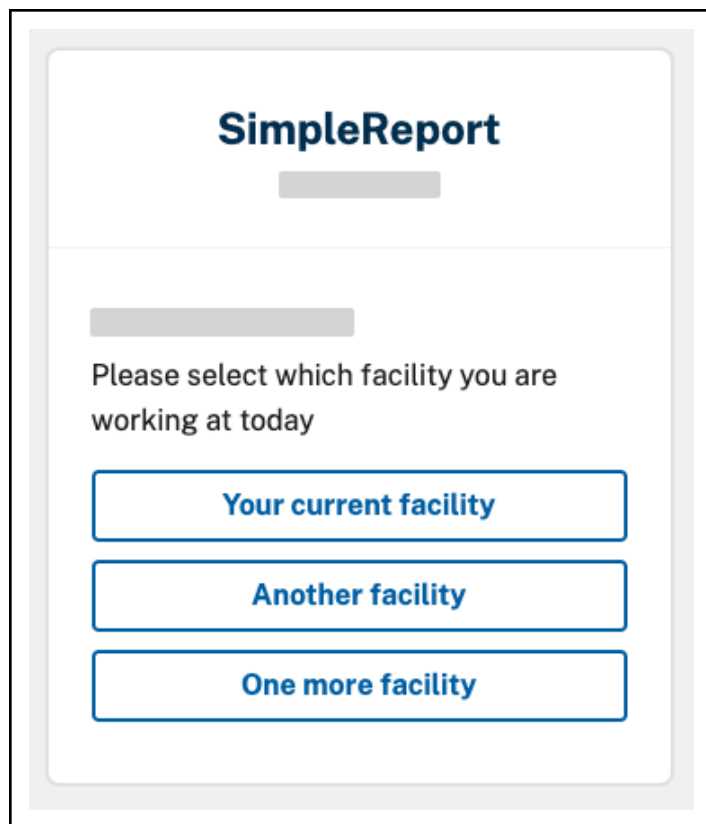
Check out our resources to get familiar with SimpleReport's testing, reporting, and workflow features.

- Check out our video [introduction and onboarding guide](#).
- Practice using SimpleReport and take a look around on our [training site](#).
- Have a look at our [resources page](#).
- Review our [K-12 schools guide](#).
- Still have a question? Visit our [support page](#).

Using SimpleReport

Select your testing facility

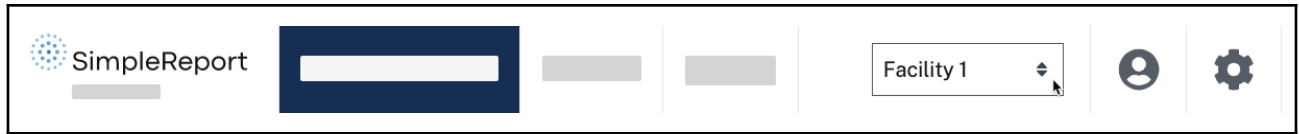
If you work at multiple testing facilities, you'll be asked about the testing facility where you're working each time you log in to SimpleReport. Just choose the correct testing facility and you'll be ready to [conduct tests](#).



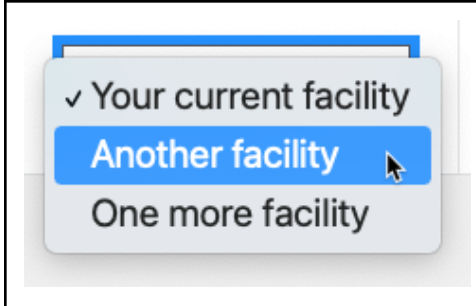
The image shows a screenshot of the SimpleReport login interface. At the top, the 'SimpleReport' logo is displayed in a dark blue font. Below the logo is a grey rectangular bar. Further down is another grey rectangular bar. Below that, the text 'Please select which facility you are working at today' is centered. Underneath this text are three rectangular buttons with blue borders and blue text, stacked vertically. The buttons are labeled 'Your current facility', 'Another facility', and 'One more facility' from top to bottom.

You might have already chosen a testing facility, and need to change it. To switch between testing facilities after you've already chosen one:

1. At the top right corner of the page, just to the left of the gear and person icons, find the name of your current testing facility. Click it to reveal a dropdown menu of other facilities.



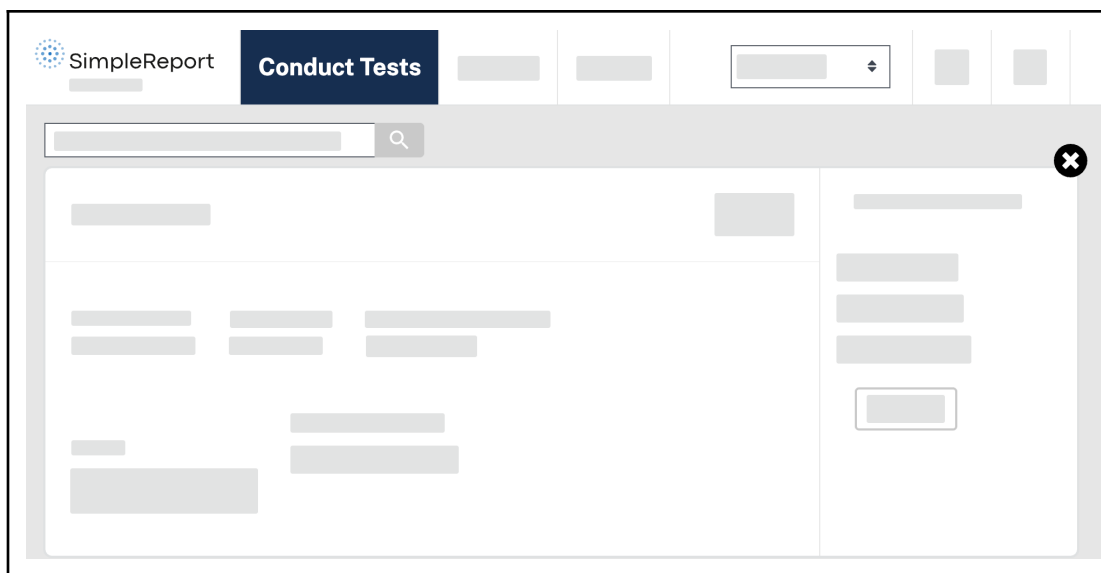
2. Choose the facility you want to switch to.



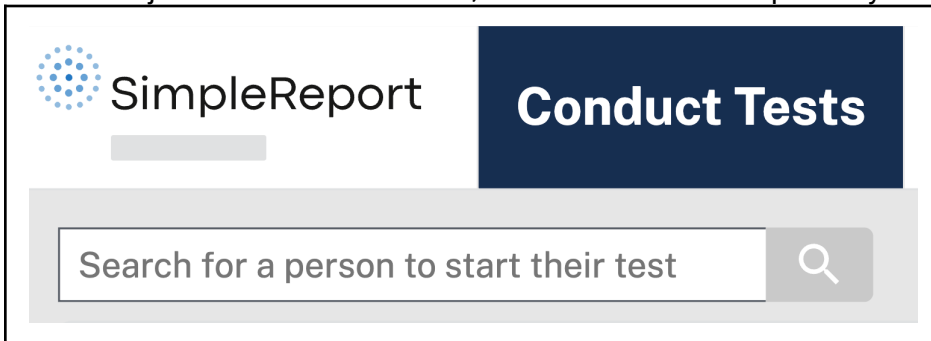
Conduct and submit tests

Once you've [logged in to SimpleReport](#), you can begin conducting tests and submitting results to your public health department:

1. Make sure that you're on the "Conduct tests" page. It's the page that appears once you've logged in and [picked the facility where you're working](#). You can also get to it by clicking **Conduct tests** at the top of the page.



2. In the text field just below **Conduct tests**, enter the name of the person you're testing.

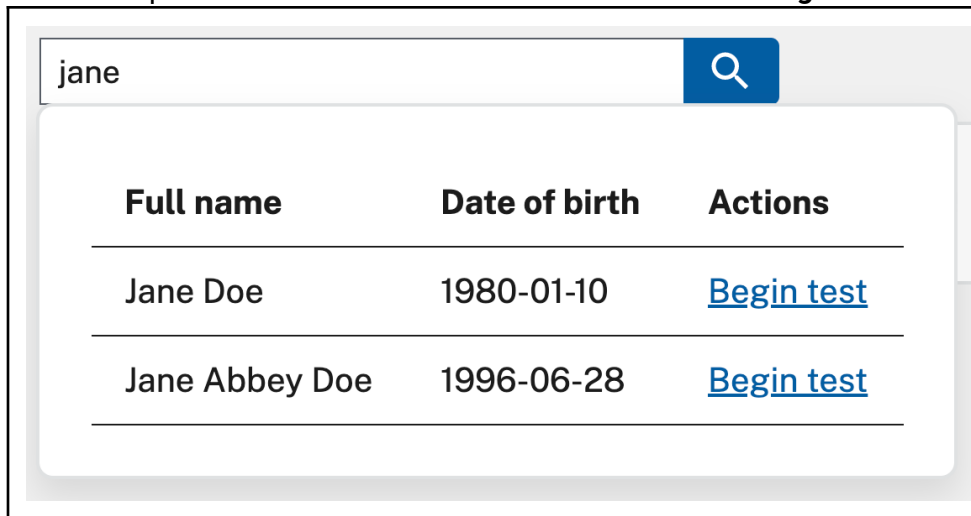
The image shows the 'SimpleReport' logo on the left and a dark blue button labeled 'Conduct Tests' on the right. Below these is a light gray search bar with the placeholder text 'Search for a person to start their test' and a magnifying glass icon on the right side.

SimpleReport

Conduct Tests

Search for a person to start their test

3. Confirm the person's full name and date of birth. Then click **Begin test** to the right of their name.

The image shows a search bar with 'jane' entered and a magnifying glass icon. Below the search bar is a table with three columns: 'Full name', 'Date of birth', and 'Actions'. There are two rows of results. The first row shows 'Jane Doe' with a date of birth of '1980-01-10' and a 'Begin test' link. The second row shows 'Jane Abbey Doe' with a date of birth of '1996-06-28' and a 'Begin test' link.

Full name	Date of birth	Actions
Jane Doe	1980-01-10	Begin test
Jane Abbey Doe	1996-06-28	Begin test

If the person you're looking for doesn't appear in the search results, make sure that you've spelled their name correctly. If you still can't find them, you'll need to [add them](#) before proceeding with the rest of these steps.

4. The person you're testing will need to answer a test questionnaire.

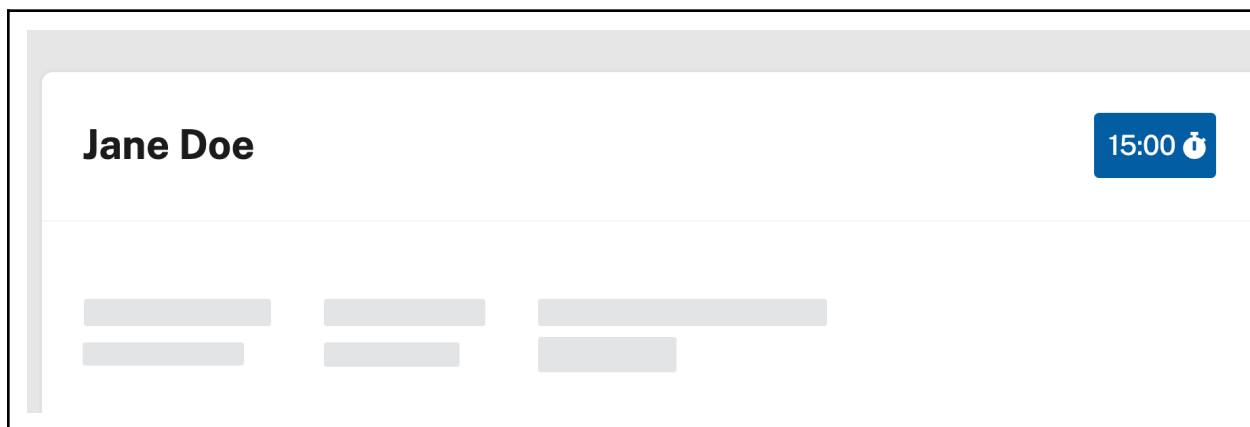
5. Select **Complete questionnaire verbally**. The test questionnaire will appear. The first question asks the patient how they want to get their results. If they choose to get their results by text, they'll get a notification as soon as you submit their results in SimpleReport. (The text message includes a link to a secure portal to check their result.) If they don't want their results via text, you can also [print a copy](#).

You can ask these test questions now, or click **Continue** and come back to them later. Either way, you'll need to complete them before submitting test results. Please refer to your public health department requirements to make sure you have the patient complete all required information.

6. The person's name will appear on a card on the "Conduct tests" page. You can continue with their test or, if you're testing multiple people at once, you can repeat the previous steps for each of the people you're testing.

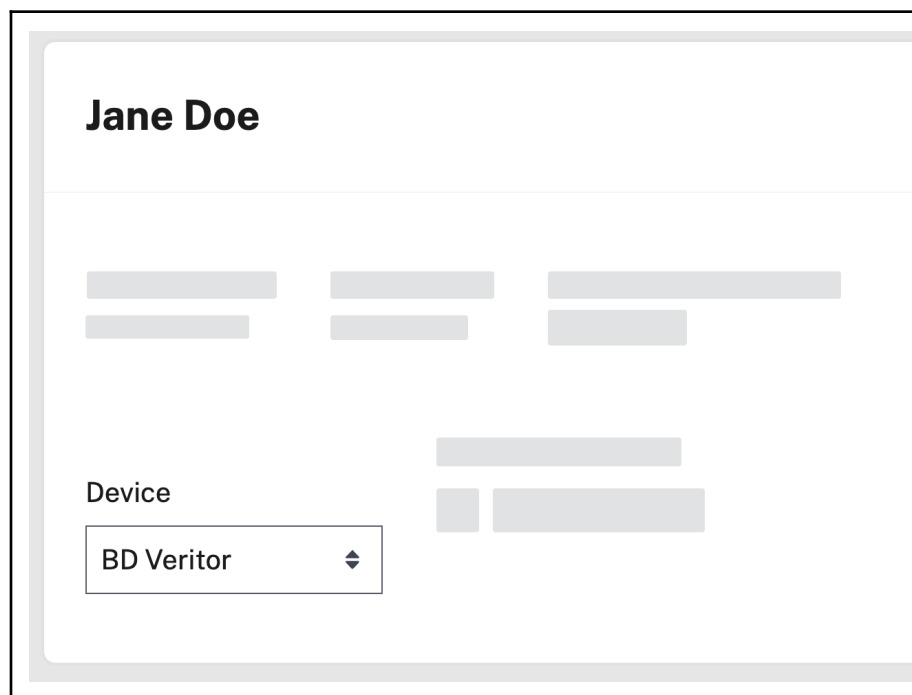
7. Collect the swab from the person you're testing and prepare their sample.

8. (optional) On the person's card, click the blue button with the stopwatch icon to start the timer. If your device's sound is on, you'll hear an alarm at the end of the required time. You can restart the timer at any time by clicking the blue button again.



A screenshot of a user interface for a person's card. The card is titled "Jane Doe" in bold black text. In the top right corner, there is a blue button with the text "15:00" and a stopwatch icon. Below the title, there are three horizontal bars representing a list or table, each with two sub-bars underneath. The entire card is enclosed in a light gray border.

9. Below the person's phone number, you'll have the option to select the testing device from the dropdown. Make sure that the correct device is selected. (It defaults to your facility's primary device.) If the device you're using isn't on the list, ask an administrator to [add the device to your SimpleReport facility settings](#). If the device isn't available for them to add, the administrator will need to contact SimpleReport to request this.



A screenshot of a user interface for a person's card, similar to the one above. The card is titled "Jane Doe" in bold black text. Below the title, there are three horizontal bars representing a list or table, each with two sub-bars underneath. Below these bars, there is a "Device" label and a dropdown menu. The dropdown menu is open, showing "BD Veritor" as the selected option. The entire card is enclosed in a light gray border.

10. Once the test is complete, select the result of the test on the right side of the person's card: either "Positive", "Negative", or "Inconclusive".

11. Make sure that you've completed the test questionnaire. You can review the questions by clicking **Test questionnaire** on the card. A gray "PENDING" tag means that some answers are still missing. A green "COMPLETE" tag means that all questions are completed.

You can submit the results without completing all of the questions, if the person being tested declines to answer them.

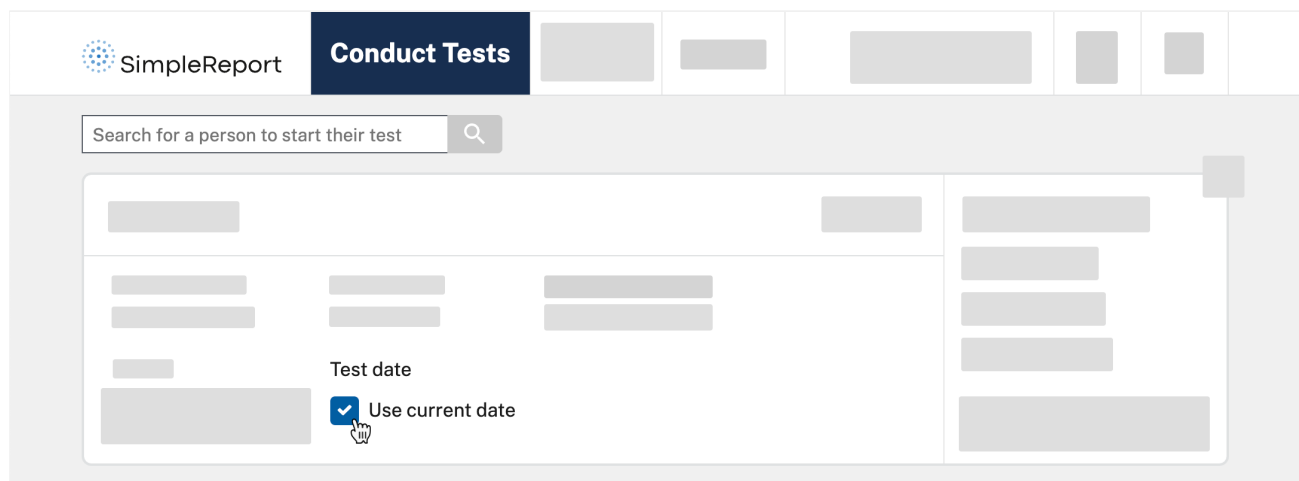
12. Click **Submit**.

You've successfully submitted the test result to your public health department. You're all done. If you have the SimpleReport permissions to do so, you can also [review submitted results](#).

Backdate a test

If you're submitting test results you've already conducted, you can backdate the result in SimpleReport.

1. Go to Conduct Tests, search for a patient name, and click Begin test
2. Uncheck the checkbox that says Use current date



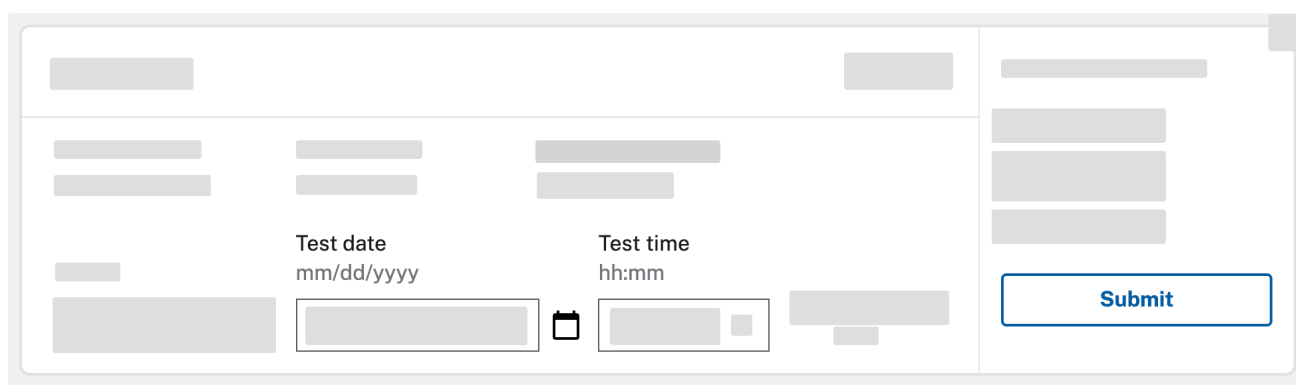
SimpleReport **Conduct Tests**

Search for a person to start their test

Test date

☒ Use current date

Enter the correct Test date and Test time. Enter the result by clicking **Submit**.



Test date mm/dd/yyyy

Test time hh:mm

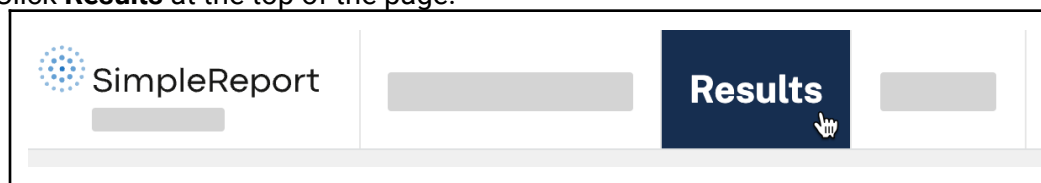
Submit

Manage results

Review results

To find results:

1. Click **Results** at the top of the page.



SimpleReport

Results

2. A table of results from your testing facility will appear showing all results from the past 48 hours. To show older results, you can always click the blue **See all results** button at the bottom of the page.

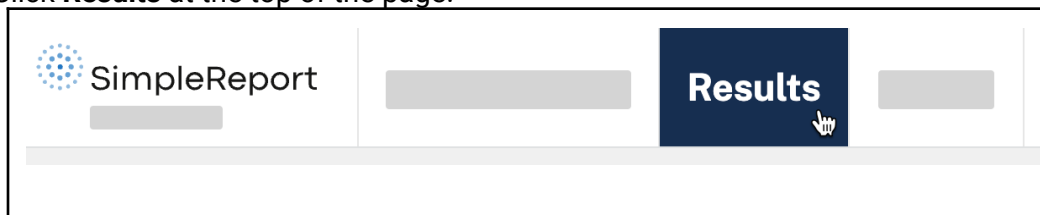
If there's a problem with any result, you can [mark it as an error](#).

Print someone's test results

If you need a paper copy of a test result, you can generate it in SimpleReport.

To print someone's test results:

1. Click **Results** at the top of the page.

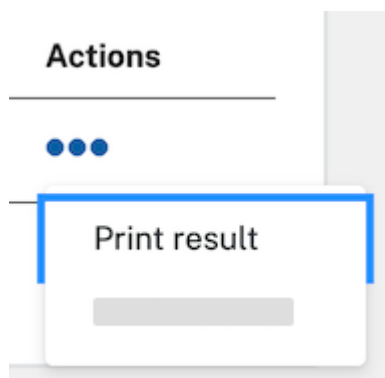


2. A table of results from your testing facility will appear showing all results from the past 48 hours. To show older results, you can always click the blue **See all results** button at the bottom of the page. 3. Find the result that you want to print, and go all the way to the right of the page. Under the "Actions" column, click the three dots in the same row as the result that you want to print.

Test Results (all)

				Actions
Jane Doe				...

4. Click **Print result**.



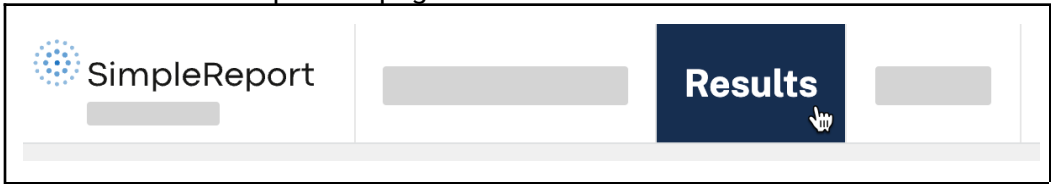
5. A preview of the test result will appear. Click the blue **Print** button in the top right corner and follow the instructions to print the file.
6. Click **Close** to exit the preview and return to the "Results" page.

Correct a previous test result

If something goes wrong with a test result, you can correct it in SimpleReport. The previous result will still be visible, but marked as an error and submitted to the public health department.

To correct a previous test result:

- 1. Click **Results** at the top of the page.



- 2. A table of results from your testing facility will appear showing all results from the past 48 hours. To show older results, you can always click the blue **See all results** button at the bottom of the page.

- 3. Find the result in the table, and go all the way to the right of the page. Under the "Actions" column, click the three dots in the same row as the result that you want to correct.

Test Results (all)				
				Actions
Jane Doe				...

- 4. Click **Mark as error**.



5. A box will appear and ask you why you want to mark the result as an error. Enter a reason, then click **Yes, I'm sure**. (Your reason needs to be at least 4 characters long before you can proceed.)

Are you sure you want to mark this test result for **Jane Doe** as an error?

If so, please enter a reason.

Make sure that your reason is at least 4 characters long.

[No, go back](#) Yes, I'm sure

The result will be marked as an error, and will appear with a strike through it when you review it in the future.

Test Results (all)				
Person Name	Date of Test	Result	Device	Actions
Jane Doe	Feb 12, 2021 11:54 AM	NEGATIVE	Abbott IDNow	

To submit a corrected result, follow the instructions to [conduct and submit a test](#), and be sure to update the date and time of the test to reflect when the test originally occurred.



Manage people you test

Self-registration

The fastest way to get new people into SimpleReport and start conducting tests is through patient self-registration. Only new patients need to self-register.

To offer self-registration to your patients:


1. Go to the gear icon, then click on the “Patient self-registration page” on SimpleReport. Use the “Organization link” if you want the patient to be able to get tested at any of your locations, or use the relevant “Testing facility link” if they will only be tested at one location.




Patient self-registration **NEW**

Patient self-registration **NEW**

Organization link

<https://training.simplereport.gov/register/DIS-O>  **Copy link**

Testing facility links

Testing facility name	Patient self-registration link
Testing Site	training.simplereport.gov/register/T37FT 

2. Send the link to new patients before their test via email, text message, mail, etc. You can also give out the link in person at your testing facility using a sign or printed form with a QR code, for example.
3. Patients complete the self-registration form online, at their convenience.
4. When they arrive for testing, simply search for patients by name in SimpleReport and follow your normal process to check them in.

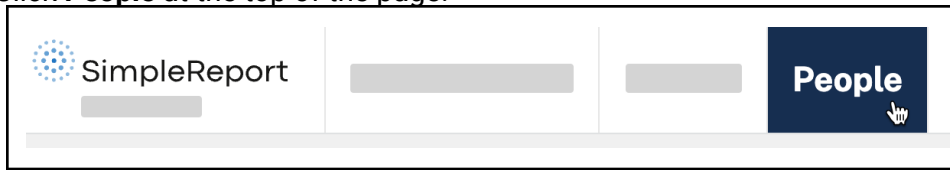
Add a new person

In order to report test results for someone, you’ll need to make sure that their information has been added to SimpleReport.

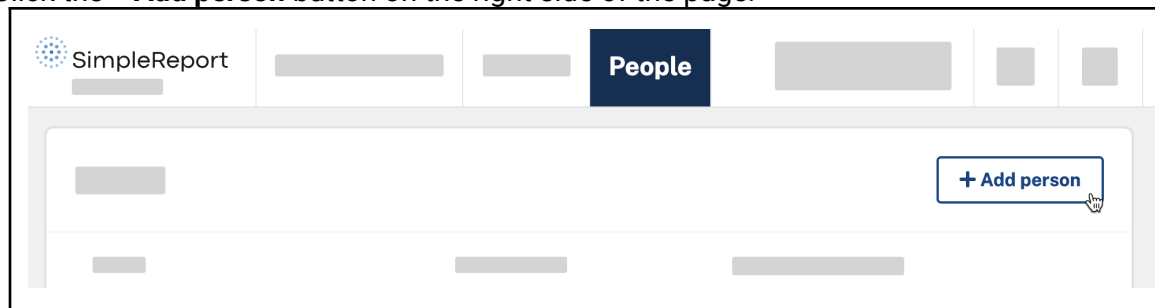
You can find out if they’ve already been added by searching for their name in the “Search for a person to start their test” field, just beneath the SimpleReport logo on the “Conduct Tests” page. If their name doesn’t appear in the search results, you can add them.

To add someone new:

1. Click **People** at the top of the page.



2. Click the **+ Add person** button on the right side of the page.



3. Enter the person's information on the "Add New Person" page that appears. There are a few types of information to enter for the new person:

- **Role (optional):** Mark the person as either "Staff", "Resident", "Visitor", or "Student".
 - **Facility (required):** Associate the person with all of your organization's testing facilities, or just one. They'll only appear in search results for tests conducted at the facilities that they're associated with.
 - **Demographics (optional, but encouraged):** Ask the person how they identify in terms of their race, ethnicity, and sex. We know that public health problems are disproportionately high in some populations. Filling out this information can help efforts to recognize and mitigate disparities in health outcomes.
- Many questions here appear as options. Please refer to your public health department requirements to make sure you complete all required information.

4. When you're done, click **Save changes** at either the bottom right or top right corner of the page.

A green confirmation box will appear to let you know that you've successfully added someone new. You're all done.

If you're ready to conduct a test for this person, learn how to [conduct and submit tests](#).

Archive a person

Archiving a person removes them from your list of people. Because it's archived and not deleted, their record will still be accessible if it needs to be recovered later.

To archive a person:

1. Click **People** at the top of the page.



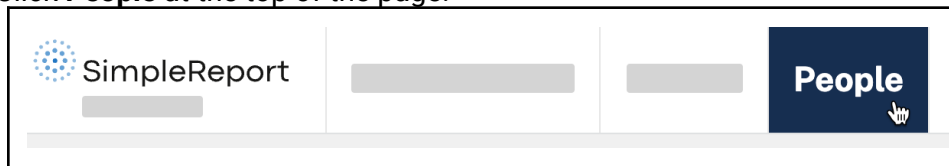
2. Go to the Actions column.
3. Click on the three dots next to the person's name you want to archive, then click **Archive record**.
4. Confirm archive request.

Update someone's profile

After you've added someone in SimpleReport, you may need to return and update their information, including adding or modifying the testing facilities where they'll be tested.

To update someone's profile:

1. Click **People** at the top of the page.



2. Click on the name of the person whose profile you want to update.
3. A page with all of the person's information will appear. Add or edit whichever information you need to update.
4. Click the blue **Save changes** button at either the top right or bottom left of the page. (The button will be gray until you've made a change.)

You'll be sent back to the "People" page, and a green box will appear at the bottom of the page to confirm that SimpleReport has saved your update. You're all done.

Manage users

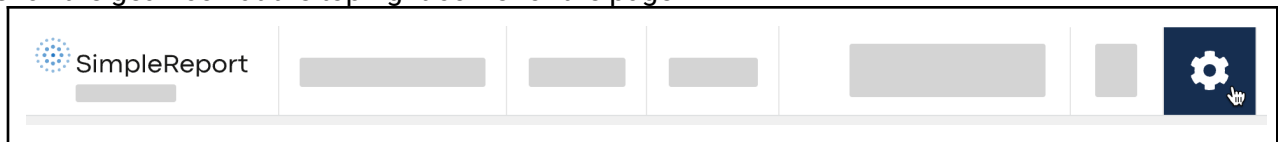
Manage user permissions

You might want to limit which members of your staff can perform certain tasks or access certain information in SimpleReport. All users can conduct and report tests, but you can restrict access to other things, like viewing and correcting results, viewing and editing profiles, and accessing facility settings.

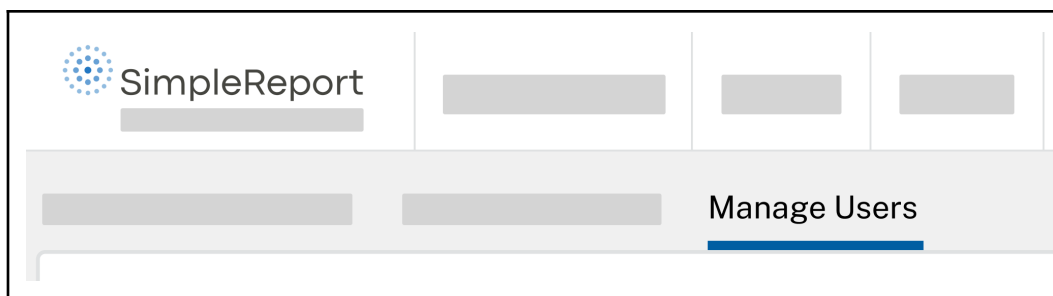
To manage user permissions in SimpleReport, you must have admin privileges. If you don't have admin privileges, talk to an admin about upgrading permissions on your account.

To change permissions for a user:

1. Click the gear icon at the top right corner of the page.



2. Beneath the SimpleReport logo at the top of the page, find the “Manage Organization”, “Manage Facilities”, and “Manage Users” tabs. Click **Manage Users**.



3. Under “Users”, click the user whose access you want to edit.

There are three levels of access: “Admin”, “Standard”, and “Entry only”:

- **Admin** users have full permissions to conduct and report tests, manage results, manage people, and manage testing facility and user settings.
- **Standard** users can conduct and report tests, manage results, and manage people. They can't manage testing facility or user settings.
- **Entry only** users can only conduct and report tests

4. Select the access level that you want to grant for this user, then click **Save changes**.

The screenshot shows a user profile configuration interface. On the left is a sidebar with a list of users. The main area displays the selected user's details and three radio button options for access levels: 'Admin (full permissions)', 'Standard user (manage results and profiles)' (which is selected), and 'Entry only (conduct tests)'. A 'Save changes' button is located at the bottom right of the form.

The next time this user logs in to SimpleReport, they'll have the level of access that you just set.

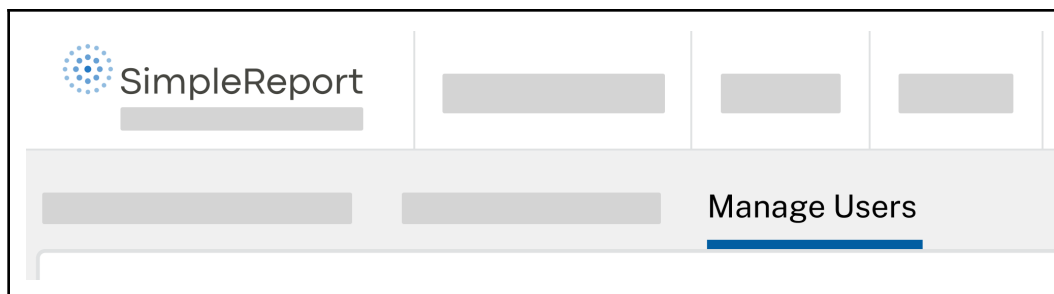
Invite new users

Admins can invite new users directly in SimpleReport. To invite a new user:

1. Click the gear icon at the top right corner of the page.



2. Beneath the SimpleReport logo at the top of the page, find the "Manage Organization", "Manage Facilities", and "Manage Users" tabs. Click **Manage Users**.



3. Under “Users”, click **+ New user** in the top right corner.
4. Enter the first name, last name, and email address of the person you want to invite, then click **Send invite**. They’ll receive an email with a link to sign up for a SimpleReport account.
5. New users will automatically be assigned the “Standard” access level, which allows them to conduct tests and manage results and profiles. Once you send the invite, you can change the user’s access level by following the instructions to [manage user permissions](#).

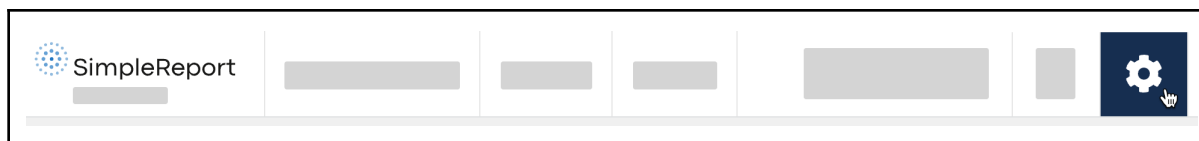
Manage facility info

Add a facility

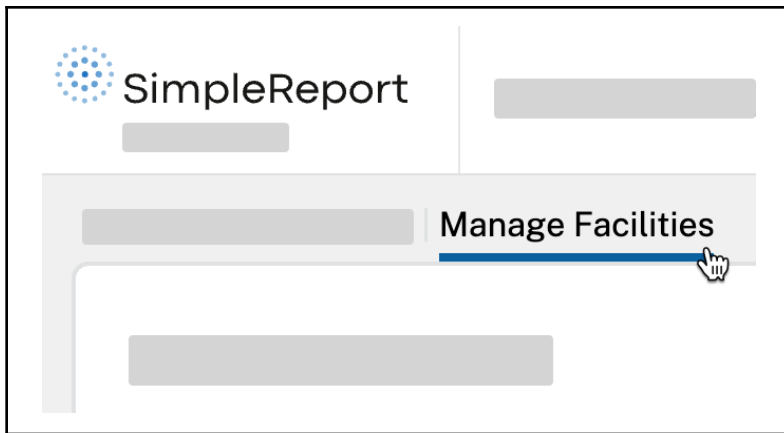
You can add a testing facility directly in SimpleReport. Before you add a new facility, make sure that it’s in [a jurisdiction that SimpleReport supports](#).

To add a testing facility:

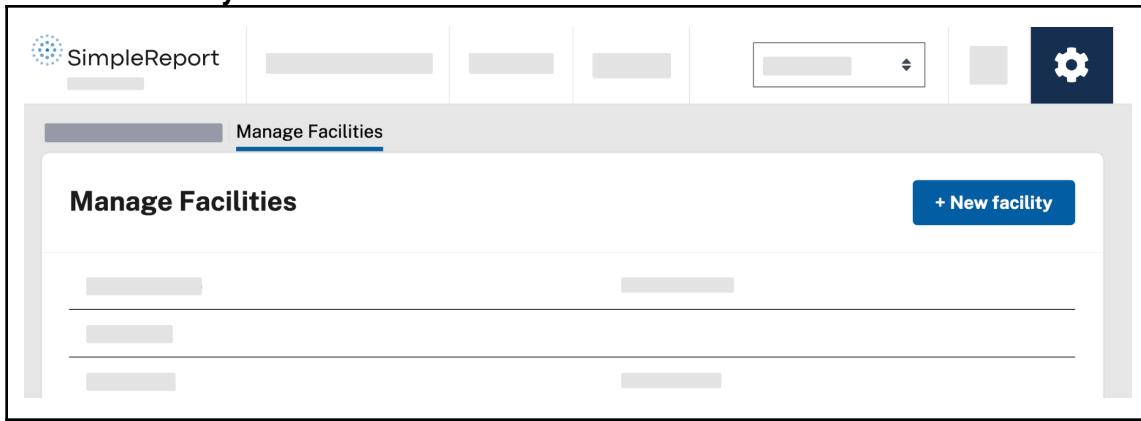
1. Click the gear icon at the top right corner of the page. (If the gear doesn’t appear in your account, you’ll need to have an administrator [change your account permissions](#) before you can add a facility.)



2. Beneath the SimpleReport logo at the top of the page, find the “Manage Organization” and “Manage Facilities” tabs. (Your organization is the umbrella for all of your facilities.) Click **Manage Facilities**.

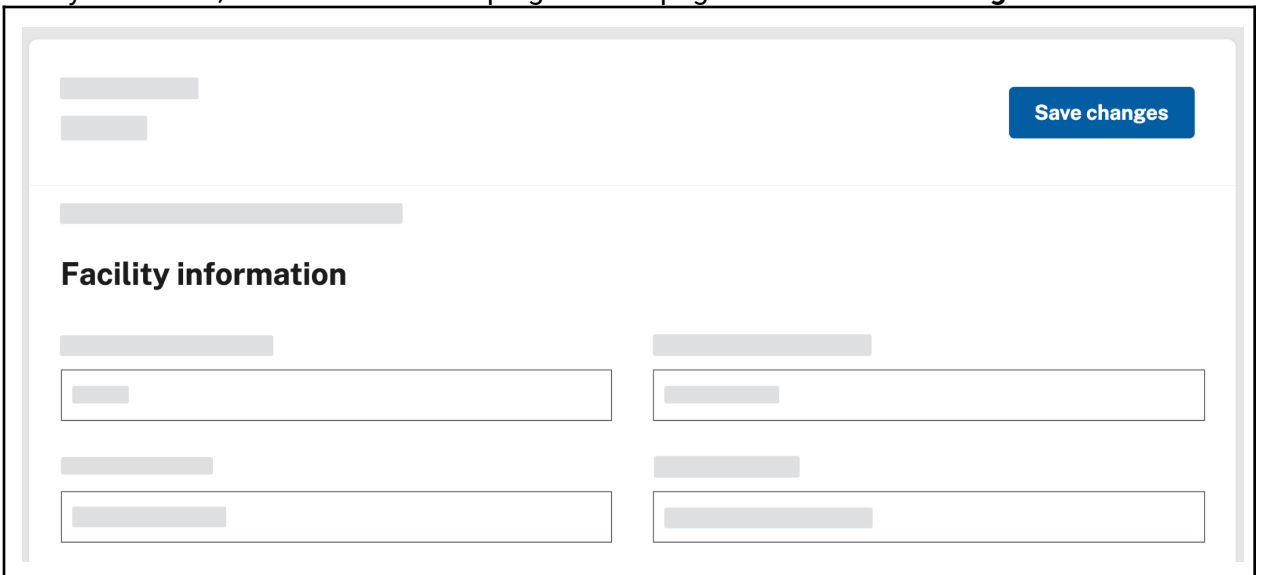


3. Click **+ New facility**.



4. Enter information for the new facility.

5. When you're done, scroll back to the top right of the page and click **Save changes**.



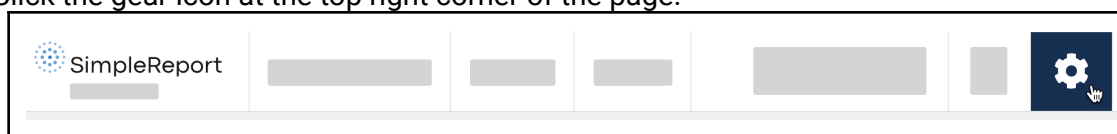
Update facility settings

You may need to change information about your testing facility, from the phone number to the ordering provider to the testing devices you use.

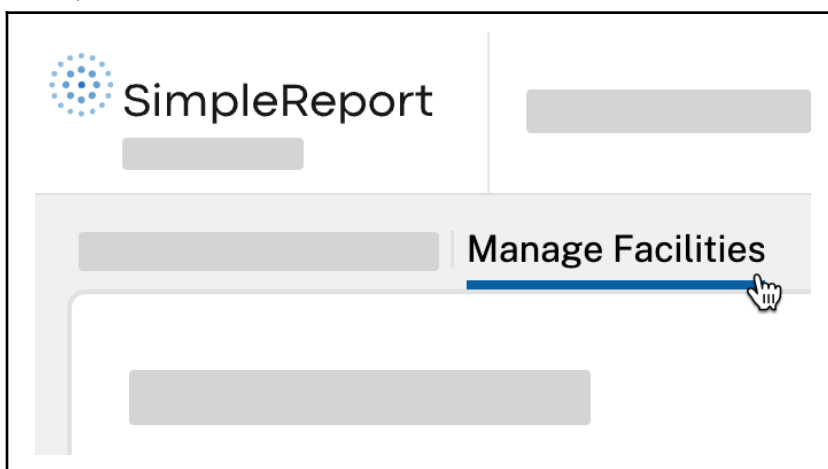
Only change testing facility names if doing so is absolutely necessary. To change the name of your facility, contact support@simplereport.gov to make sure that your results continue sending to your public health department.

To update your testing facility information:

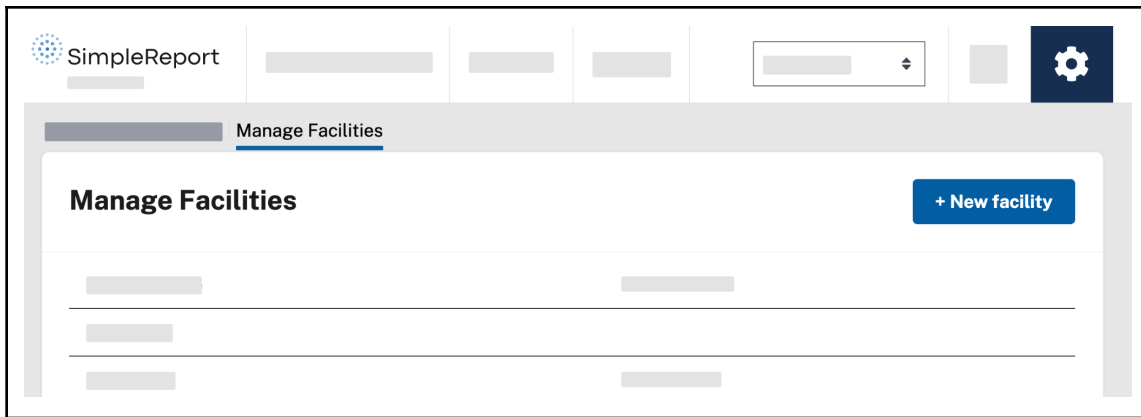
1. Click the gear icon at the top right corner of the page.



2. Beneath the SimpleReport logo at the top of the page, find the “Manage Organization” and “Manage Facilities” tabs. (Your organization is the umbrella for all of your testing facilities.) Click **Manage Facilities**.

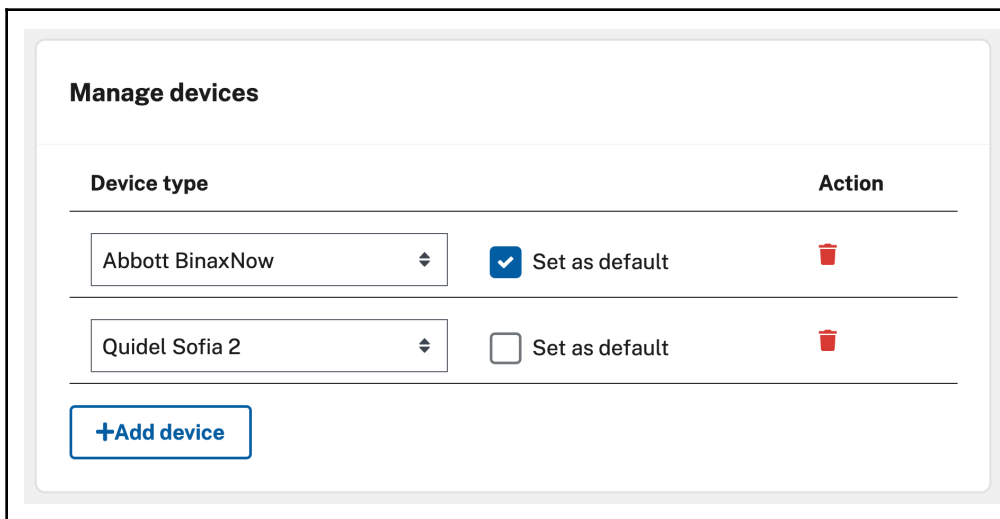


3. Click the name of the testing facility whose information you want to edit. (You can also [add a new facility](#).)



4. Edit the information that you want to change.

If the testing devices your facility uses have changed, update your device information at the page, on the “Manage devices” card. You can also indicate which device should be the facility’s default device for tests.



5. When you’re done, scroll back to the top right of the page and click **Save changes**.

Contact us

If you’ve already read our [troubleshooting techniques](#) and are still having problems with SimpleReport, please reach out to us.

Contact support@simplereport.gov with information about the problems you're experiencing. Tell us what’s going on and what you’re trying to do, and include screenshots of the issue. We’ll follow up to help.