



U.S. DIGITAL SERVICE

# SimpleReport User Guide

Version 1.1 - 1.22.2021

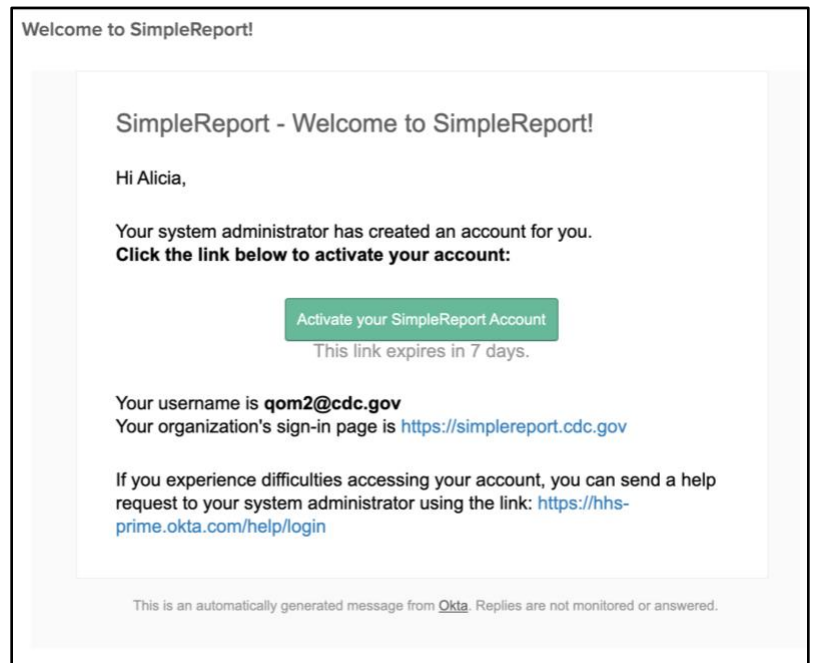
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# Registering for an account

## Step 1:

SimpleReport uses a service called “Okta” to register users and access the application. You should receive an invite in your email for an invitation to join Simple Report. Click the green “Activate your SimpleReport Account” to sign up. You must register within 7 days of receiving this invitation.



## Step 2:

After clicking the “Activate your SimpleReport Account” from the invitation email, you’ll set up an account by choosing:

- A secure password
- A forgot password question
- A security image

Make those selections and remember/save them, then click the “Create My Account” button at the bottom.

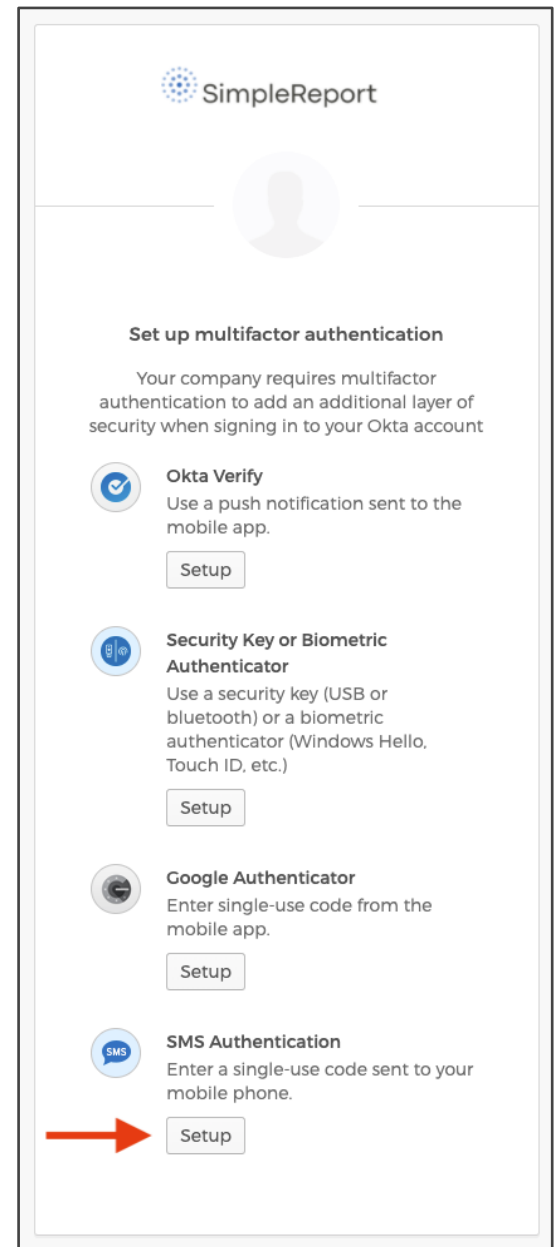
A screenshot of the "Create your SimpleReport account" form. The form is titled "Welcome to SimpleReport, Will! Create your SimpleReport account". It has three main sections: 1. "Enter new password" with a password field, a "Show/Hide" icon, and a list of "Password requirements" (At least 8 characters, A lowercase letter, An uppercase letter, A number, No parts of your username, Your password cannot be any of your last 4 passwords). Below this is a "Repeat new password" field. 2. "Choose a forgot password question" with a dropdown menu showing "What is the food you least liked as a child?" and an "Answer" field. 3. "Click a picture to choose a security image" with a grid of 12 images (Golden Gate Bridge, Sunflower, Green leaves, Bridge, Lighthouse, Windmill, Aurora Borealis, Blue bubbles, Train, Sunset, Road, Star) and a "Create My Account" button at the bottom right.

### Step 3:

After you've registered, you'll have to select a multifactor authentication option to verify your identity for SimpleReport. This can be done using any of these options. For most users, SMS is the easiest and fastest option:

- An SMS text message to your phone
- Installing the Google Authentication App, downloaded to your mobile phone
- Installing the Okta Verify Authentication App to your mobile phone
- *(Not currently active unless you have a CDC account)* Using a Security Key or Biometric Authenticator

Select your multifactor authentication choice by clicking the "Setup" button below the option you want to use.



SimpleReport

Set up multifactor authentication

Your company requires multifactor authentication to add an additional layer of security when signing in to your Okta account

**Okta Verify**  
Use a push notification sent to the mobile app.  
[Setup](#)

**Security Key or Biometric Authenticator**  
Use a security key (USB or bluetooth) or a biometric authenticator (Windows Hello, Touch ID, etc.)  
[Setup](#)

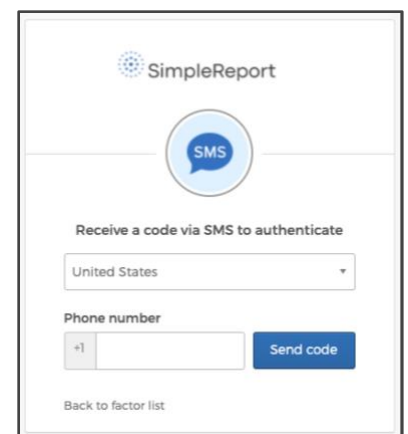
**Google Authenticator**  
Enter single-use code from the mobile app.  
[Setup](#)

**SMS Authentication**  
Enter a single-use code sent to your mobile phone.  
[Setup](#)

### Step 3a:

If you choose select SMS Authentication (for Okta Verify or Google Authenticator instructions, go to step :

Enter your phone number in the phone number field and click the blue Send Code button.



SimpleReport

Receive a code via SMS to authenticate

United States

Phone number

+1

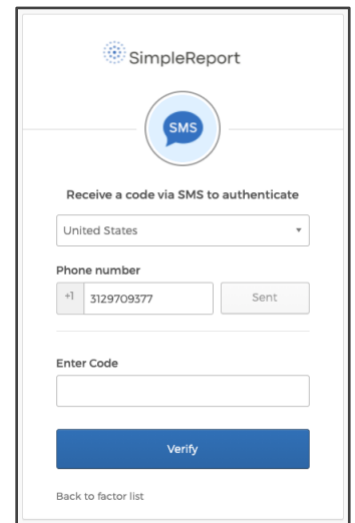
[Send code](#)

[Back to factor list](#)

### Step 3b:

You'll receive an SMS text message shortly on your mobile phone with a 6-digit code. Post that code in field marked "Enter Code" on the log in window, and click Verify.

If you're using SMS authentication, go to Step 5 in the instructions.  
If you're using Google Authenticator or Okta Verify, go to Step 4.



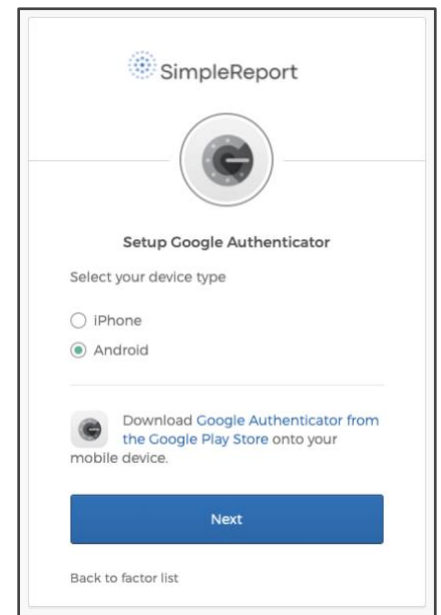
The screenshot shows the SimpleReport SMS authentication interface. At the top is the SimpleReport logo. Below it is a blue circular icon with 'SMS' inside. The text 'Receive a code via SMS to authenticate' is displayed. There is a dropdown menu for 'United States'. Below that is a 'Phone number' field with a '+1' icon and the number '3129709377', and a 'Sent' button. An 'Enter Code' field is below the phone number. A large blue 'Verify' button is at the bottom, with a 'Back to factor list' link underneath.

### Step 4:

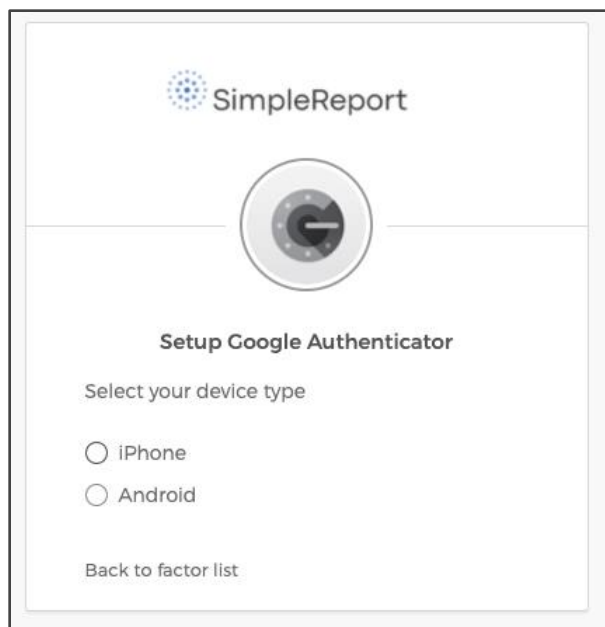
To use the Google Authenticator or Okta Verify mobile application methods, click the "Setup" button below that option.

### Step 4a:

Select your device type, then click the link to Download the application from that App store. Wait for the app to download and install, then click "Next."



The screenshot shows the SimpleReport 'Setup Google Authenticator' screen. It features the SimpleReport logo and a Google Authenticator icon. The text 'Setup Google Authenticator' is prominent. Below it, 'Select your device type' is followed by radio buttons for 'iPhone' and 'Android' (which is selected). A link to 'Download Google Authenticator from the Google Play Store' is provided. A large blue 'Next' button is at the bottom, with a 'Back to factor list' link below it.

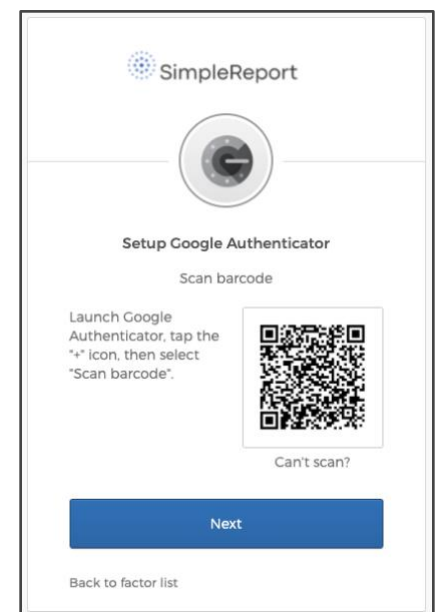


This is a duplicate of the previous screenshot, showing the SimpleReport 'Setup Google Authenticator' screen with the 'Android' option selected.

### Step 4b:

After you've installed the Google Authenticator or Okta Verify app, launch the app on your phone, and scan the QR Code shown in your registration window using your phone to link your account and device.

### Step 4c:



The screenshot shows the SimpleReport 'Setup Google Authenticator' screen, specifically the 'Scan barcode' step. It features the SimpleReport logo and a Google Authenticator icon. The text 'Setup Google Authenticator' is prominent. Below it, 'Scan barcode' is followed by instructions: 'Launch Google Authenticator, tap the "+" icon, then select "Scan barcode"'. A QR code is displayed in a box. Below the QR code is a 'Can't scan?' link. A large blue 'Next' button is at the bottom, with a 'Back to factor list' link below it.

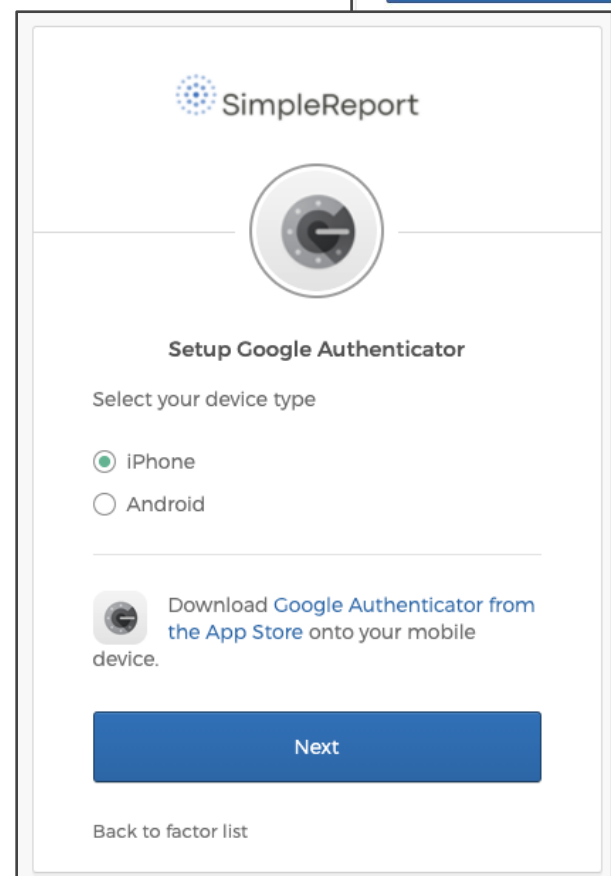
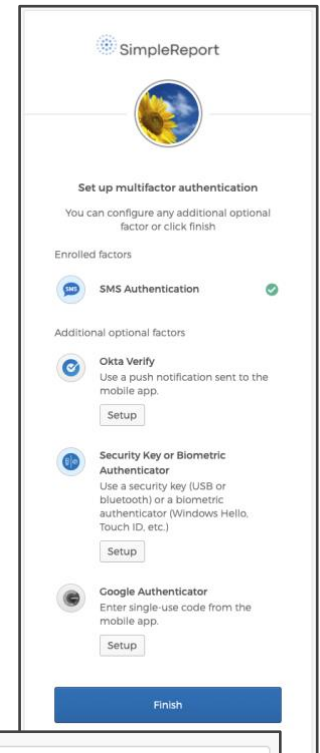
Go into the app and it will give you a code for Okta, type that code into the login page and click verify. The code will change every minute so you will need to look it up each time you log in.

### Step 5:

Click the “Finish” button at the bottom of the registration page, and you’ll receive a confirmation email message that your multifactor authentication has been successfully set up as well as this confirmation on the screen:

### Step 6:

Once you have confirmation that your account is registered, you can go to [SimpleReport.Gov](https://SimpleReport.Gov) and [sign in as a user](#) to [start logging test results](#).



# Signing in to SimpleReport

Once you have your [SimpleReport account set up](#), you can now log in and [start logging test results](#).

## Step 1:

Go to [SimpleReport.gov](#) and click on the “Log in” button.

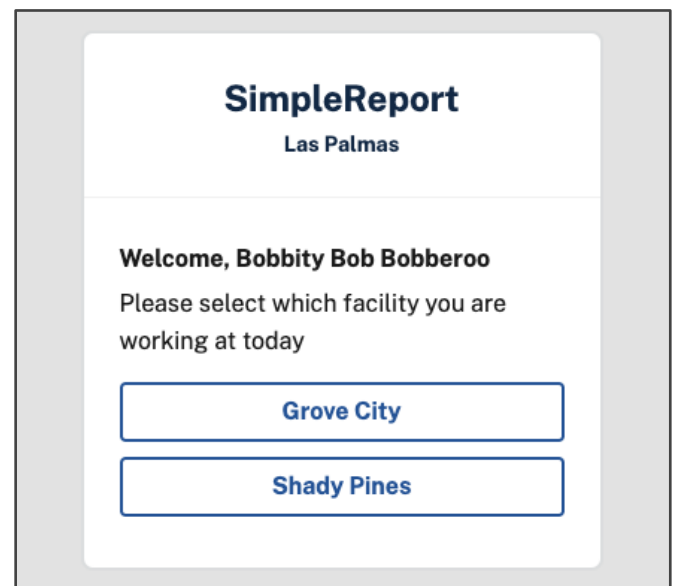
## Step 2:

Enter your username and password, and if prompted verify your identity through SMS or the authentication app you chose when signing up.



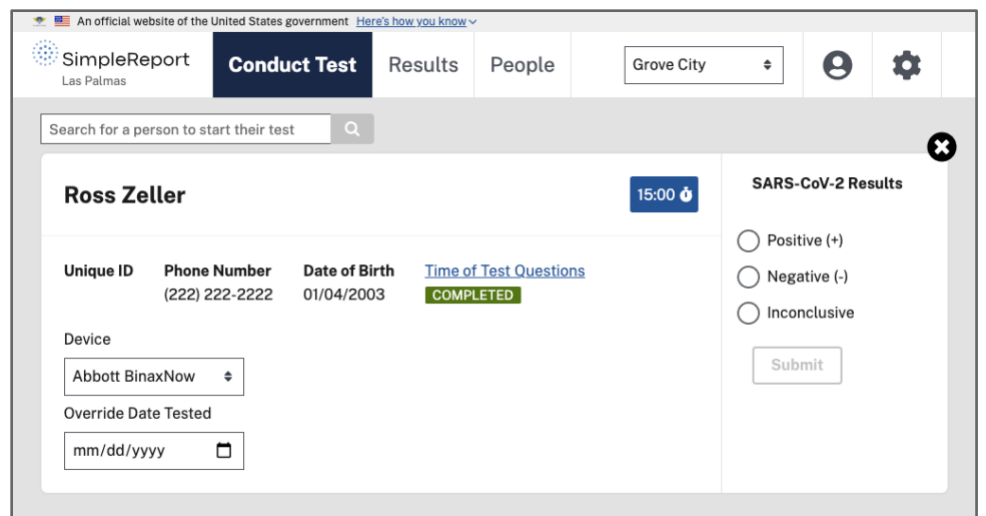
## Step 3:

If your organization has multiple testing facilities, select your facility in the top left corner of the screen:



## Step 4:

At the top of your screen you can select “Conduct Test” to run and report a test, “Results” to view previous test results, or “People” to add a new person to SimpleReport.




# Running a Test and Submitting it to Public Health

## Step 1:

After you’ve logged in, select “Conduct Test” in the top navigation bar:

An official website of the United States government [Here's how you know](#)


SimpleReport  
Las Palmas


Conduct Test

Results

People

Grove City





Search for a person to start their test

Ross Zeller

15:00

Unique ID	Phone Number	Date of Birth	Time of Test Questions
	(222) 222-2222	01/04/2003	COMPLETED

Device

Abbott BinaxNow

Override Date Tested

mm/dd/yyyy

SARS-CoV-2 Results

Positive (+)

Negative (-)

Inconclusive

Submit

## Step 2:

Search for the person in the search bar to start their test.If this is a new person to your testing site (visitor, new student, new staff member), select “People” in the top navigation and add them to the People List.

## Step 3:

Once you found the person in the search results, select their name to begin the test:

joh

Full name	Date of Birth	Unique ID	Actions
John Smith	2000-01-31	12345	<a href="#">Begin Test</a>

Search for a person to start their test

#### Step 4:

Fill out their Time of Test information, click “Save” and conduct the test.

#### Step 5:

Collect the swab from the patient, and prepare their sample in the test. Start the 15 minute Timer on the testing card for that patient. It will make a noise once the test is ready for you to read the result if your device has it’s sound turned up.

**Karen Karen** Cancel Save

### Symptoms

Are you experiencing any of the following symptoms?

- ☐ No Symptoms
- ☐ Fever over 100.4F
- ☐ Feeling feverish
- ☐ Chills
- ☐ Cough
- ☐ Shortness of breath
- ☐ Difficulty breathing
- ☐ Fatigue
- ☐ Muscle or body aches
- ☐ Headache
- ☐ New loss of taste
- ☐ New loss of smell
- ☐ Sore throat

#### Step 6:

Verify the Device selected is correct (it should default to the facility’s primary device). Once the timer expires, select the result, and click “Submit.” Your test result has now been submitted to the public health department. You do not need to do anything else.

An official website of the United States government [Here's how you know](#)

**SimpleReport** Green Acres Conduct Test Results People Settings

Lovely Living

Search for a person to start their test

**Karen Karen** 8:08

**Unique ID** **Phone Number** **Date of Birth** **Time of Test Questions**

5208794876 01/14/1987 **PENDING**

**Device**

Abbott BinaxNow

**SARS-CoV-2 Results**

☒ Positive (+)

☐ Negative (-)

☐ Inconclusive

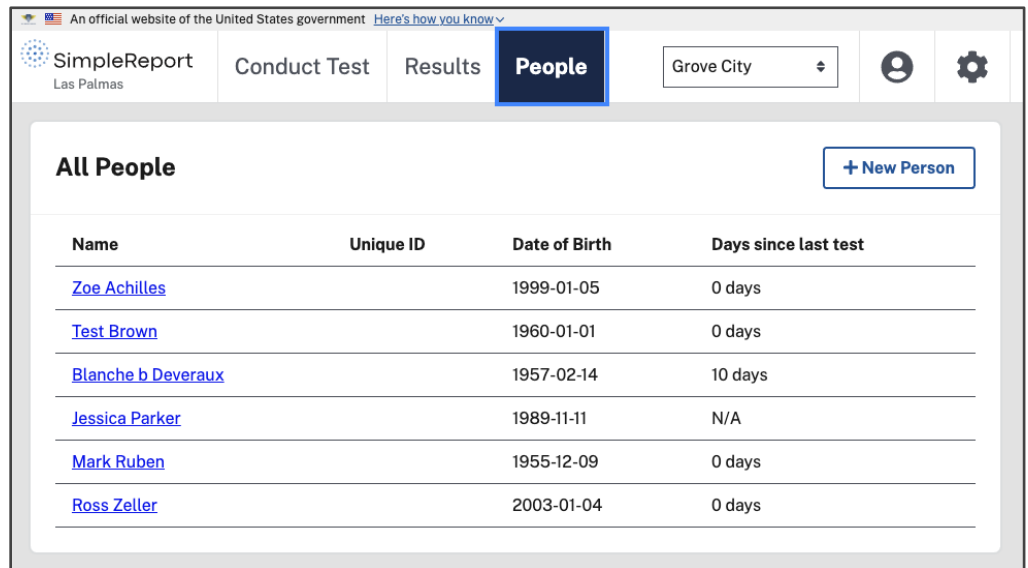
Submit



# Adding a new person to the People List

## Step 1:

After you’ve logged into the application, and select “People” in the top navigation bar, select the “New Person” button to add a new person:



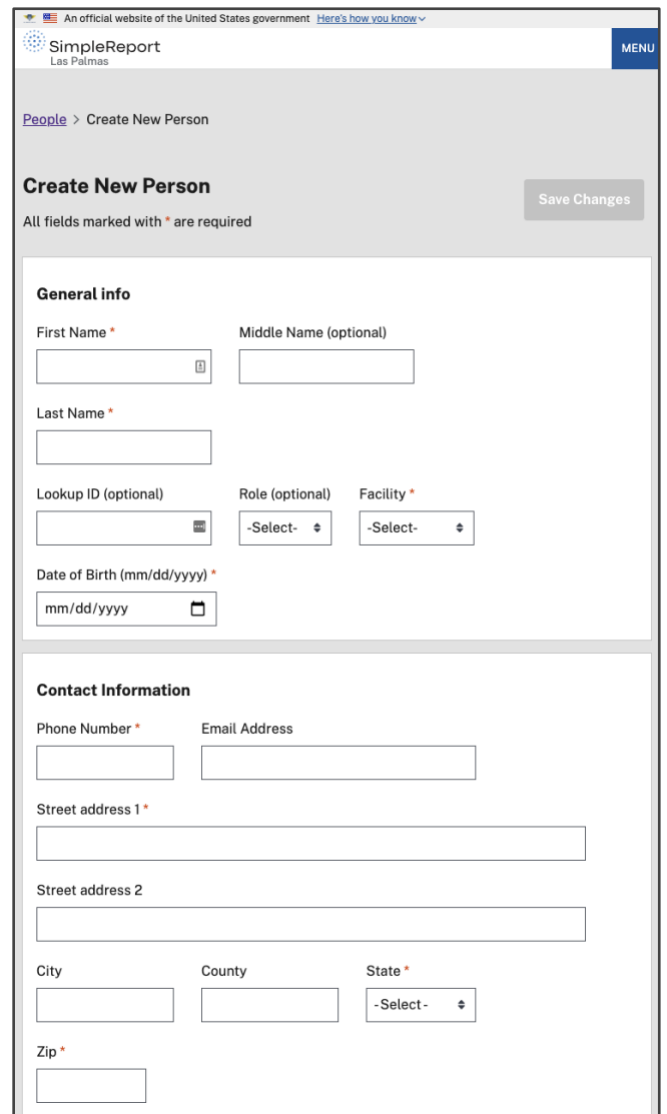
The screenshot shows the 'People' section of the SimpleReport application. The top navigation bar includes 'SimpleReport Las Palmas', 'Conduct Test', 'Results', and 'People' (which is highlighted). A dropdown menu shows 'Grove City'. A '+ New Person' button is in the top right. Below the header is a table with the following data:

Name	Unique ID	Date of Birth	Days since last test
<a href="#">Zoe Achilles</a>		1999-01-05	0 days
<a href="#">Test Brown</a>		1960-01-01	0 days
<a href="#">Blanche b Deveraux</a>		1957-02-14	10 days
<a href="#">Jessica Parker</a>		1989-11-11	N/A
<a href="#">Mark Ruben</a>		1955-12-09	0 days
<a href="#">Ross Zeller</a>		2003-01-04	0 days

## Step 2:

Fill out their personal information in the fields provided:

Item’s with red asterisks like this \* are required.



The screenshot shows the 'Create New Person' form. The top navigation bar includes 'SimpleReport Las Palmas' and a 'MENU' button. The breadcrumb trail is 'People > Create New Person'. The form has a 'Save Changes' button in the top right. The form is divided into two sections: 'General info' and 'Contact Information'.

**General info**

First Name \*  Middle Name (optional)

Last Name \*

Lookup ID (optional)  Role (optional)  Facility \*

Date of Birth (mm/dd/yyyy) \*

**Contact Information**

Phone Number \*  Email Address

Street address 1 \*

Street address 2

City  County  State \*

Zip \*

## Step 3:

Once completed, click the “Save Changes” button at the top or the bottom of the page and they will appear in the “People” section of the site now.

## Features of the Patient Card in the Test Queue

Once you've found your patient and added them to your test queue, there's many options to enter data in the patient card:

An official website of the United States government [Here's how you know](#) ✓

**SimpleReport** Lovely Living Green Acres Conduct Test Results People

Search for a person to start their test Q

**Karen Karen** 15:00

**Unique ID** **Phone Number** **Date of Birth** [Time of Test Questions](#)

5208794876 01/14/1987 PENDING

Device

BD Veritor

**SARS-CoV-2 Results**

☐ Positive (+)

☐ Negative (-)

☐ Inconclusive

Submit

**Nice Moose** 15:00

**Unique ID** **Phone Number** **Date of Birth** [Time of Test Questions](#)

3334445555 12/01/2020 PENDING

Device

BD Veritor

**SARS-CoV-2 Results**

☐ Positive (+)

☐ Negative (-)






☐ Inconclusive

Submit

### Patient Card Features:

Here's a breakdown of the different functionality of the Patient card:

<p><a href="#">Time of Test Questions</a></p> <p><span>COMPLETED</span></p>	<p><b>Time of Test Questions</b></p> <p>The questions at the time of test are editable until you click "Submit" to submit the test results. They will be "Pending" until they are filled out and show as "Completed" once all the required fields are filled in.</p>
---	--

	<p><b>Delete a test in the queue</b></p> <p>If you need to delete a test before submitting it, you can click the black “X” on the top right of the patient card.</p>
<p>The timer before it is started (click to start it):</p>  <p>Timer counting down:</p>  <p>After the timer was started and 15 minutes has passed it will tell you “RESULT READY”:</p> <p><i>15:05 elapsed</i> <b>RESULT READY</b> </p>	<p><b>15 Minute Timer</b></p> <p>Click to start the timer after you’ve collected the test and it will track and alert you when 15 minutes has expired. You can also start multiple timers at once if you are testing multiple patients.</p>
<p>Device</p> 	<p><b>Device Type</b></p> <p>The testing Device will automatically be set based on the default of the Facility that the patient is tested at (<a href="#">Facilities can change this information and devices here</a>), but you can change that at the time of test also if there are multiple devices.</p>
<p><b>SARS-CoV-2 Results</b></p> <p><input type="radio"/> Positive (+)</p> <p><input type="radio"/> Negative (-)</p> <p><input type="radio"/> Inconclusive</p> <p><input type="button" value="Submit"/></p>	<p><b>Test Results</b></p> <p>The test results have 3 options you can select. Once the Time of Test Questions and the Timer has concluded, the grey “Submit” button will turn blue and it will be clickable.</p>

**SARS-CoV-2 Results**

☐ Positive (+)

☒ Negative (-)

☐ Inconclusive

**Submit**

**Submit a test result**

Once all the Patient information is collected and the test result has finished the 15 minute test period, the Submit button will turn Blue and you can submit the results.

### Step 1:

### Step 2:

Search for the person you're looking for in the results and click their name:

### Step 3:


On the Patient Profile page, their Test History will be displayed at the bottom:

Date of Test	Result
Dec 15, 2020 4:10 PM	NEGATIVE
Dec 15, 2020 9:34 AM	NEGATIVE
Dec 21, 2020 4:12 PM	POSITIVE

# Adding or editing a Facility’s information and devices

## Step 1:

Select the gear icon in the top right corner, then “Manage Facilities” in the subnavigation:

An official website of the United States government

[Here's how you know](#)

SimpleReport


Lovely Living


Green Acres

Conduct Test

Results

People





Manage Organization

Manage facilities

Manage Organization

Save Settings


All fields marked with \* are required

Organization Name \*

Lovely Living

## Step 2:

Click on the Facility name. Or if adding a new Facility, the “+ New Facility” button in the top right.

An official website of the United States government

[Here's how you know](#)

SimpleReport


Lovely Living


Green Acres

Conduct Test

Results

People





Manage Organization

Manage facilities

Manage Facilities

+ New Facility

Facility Name	CLIA Number
<a href="#">Green Acres</a>	2342opoi
<a href="#">Greener Pastures</a>	000111222-3
<a href="#">Twin Pines</a>	59202323

### Step 3:

**Notable:** Changing the facility information can cause problems with reporting the data to public health and should only be done if absolutely necessary. If you will be changing the name of your facility, please contact [USDS@cdc.gov](mailto:USDS@cdc.gov) to ensure your results will be attributed to public health correctly.

Edit the Facility information and select default testing devices in the form:

### Step 4:

Once you've entered all the information, click "Save" at the top right and the Facility will be saved in SimpleReport for future use.

An official website of the United States government [Here's how you know](#)

SimpleReport  
Lovely Living

Green Acres

Conduct Test

Results

People

Save Changes

[← All Facilities](#)

All fields marked with \* are required

#### Facility Information

Testing Facility Name \* CLIA Number Phone Number

Street 1

Street 2

City County Zip Code \* State

#### Ordering Provider

First Name \* Middle Name Last Name \* Suffix


NPI \* Phone Number

Street 1

Street 2

City County Zip Code \* State

#### Manage Devices

Device Type	Action
Abbott IDNow	<input checked="" type="checkbox"/> Set as Default 

[+Add Device](#)

## Joining the SimpleReport Google Group

Thanks for using the SimpleReport point of care reporting tool for combatting Covid-19! We're setting up a [Google Group](#) as a means for quickly sharing out information on the project. In this free, email-based group, we will send out updates on our software releases, announce new features, as well as collect feedback and offer opportunities for you to share your thoughts about how we can improve the platform. In the group we'll have a few dozen people, including USDS and CDC staff and researchers working on building out the platform, as well as our pilot partners (like you) who are helping test and share feedback about the platform. This will be a closed group just to those parties, but anyone of those parties can see responses, send messages to the group, respond, and share their feedback and thoughts with everyone else in the group.

### Step 1:

You will need to use a work email address associated with a Google account to join. If you don't have a Google account associated with your work email, go to [accounts.google.com](#) and select "Create Account" and "To Manage My Business" in the drop down (see image on the right).

Also notable: If you're logged in with a different or personal google account you can click your profile picture in the upper right then choose "Add another account" to get to the [accounts.google.com](#) sign-in page that will let you click Create account.

### Step 2:

Create the new account with your name, then Google will send you a numeric code to your email, go get that and verify the account.

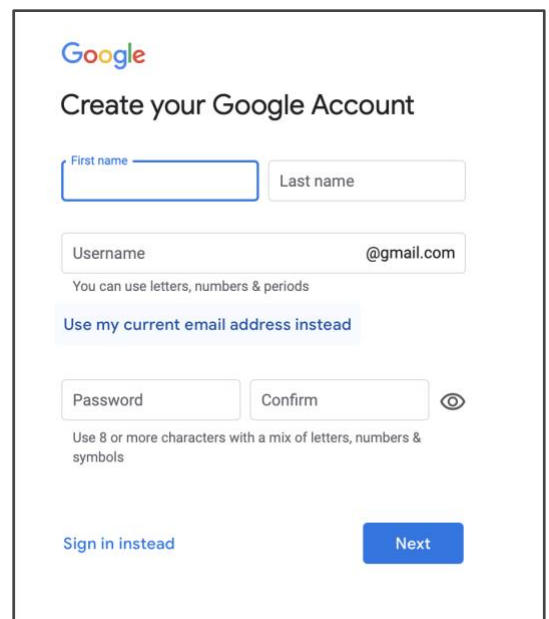
### Step 3:

Next Google will ask for a phone number. They will use this to text you a code. Add your phone number to verify the account, and verify it with the code they send.

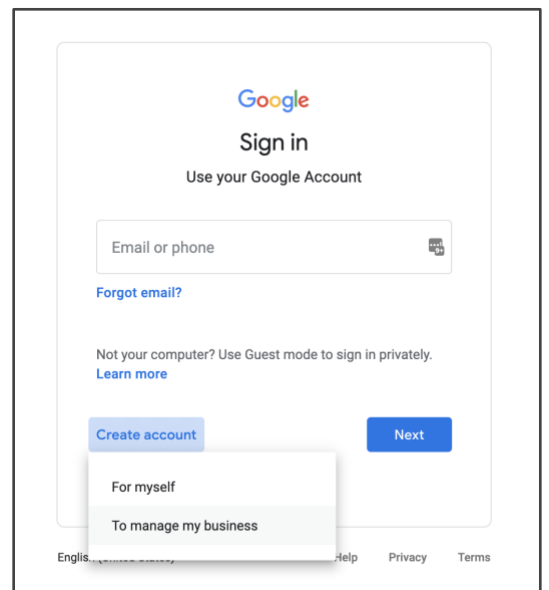
### Step 4:

Fill out the last remaining fields required (or opt out if they are optional).

### Step 5:



This screenshot shows the 'Create your Google Account' page. It includes input fields for 'First name' and 'Last name', a 'Username' field with a placeholder '@gmail.com', and a 'Password' field with a 'Confirm' field. A link 'Use my current email address instead' is visible. At the bottom, there are links for 'Sign in instead' and a 'Next' button.



This screenshot shows the 'Sign in' page with the heading 'Use your Google Account'. It features an 'Email or phone' input field, a 'Forgot email?' link, and a 'Create account' button. A dropdown menu is open from the 'Create account' button, showing two options: 'For myself' and 'To manage my business'. A 'Next' button is also visible. At the bottom, there are links for 'English', 'Help', 'Privacy', and 'Terms'.



Once your Google account is live, email Sparkle or Will at [usds@cdc.gov](mailto:usds@cdc.gov) and they can invite you to the group.

**Step 6:**

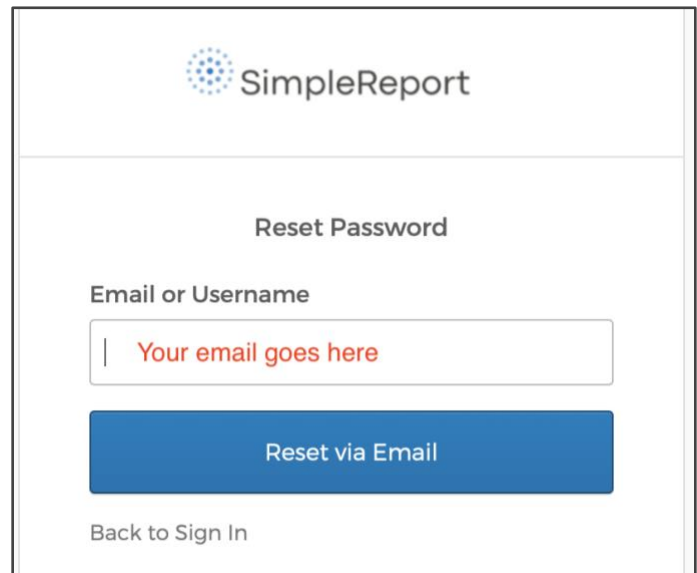
Accept the invite in your work Google account, and enjoy group conversations with the USDS, CDC, and other pilot partners in your inbox or at:

<https://groups.google.com/u/1/g/cdc-usds>

# Resetting your SimpleReport Password

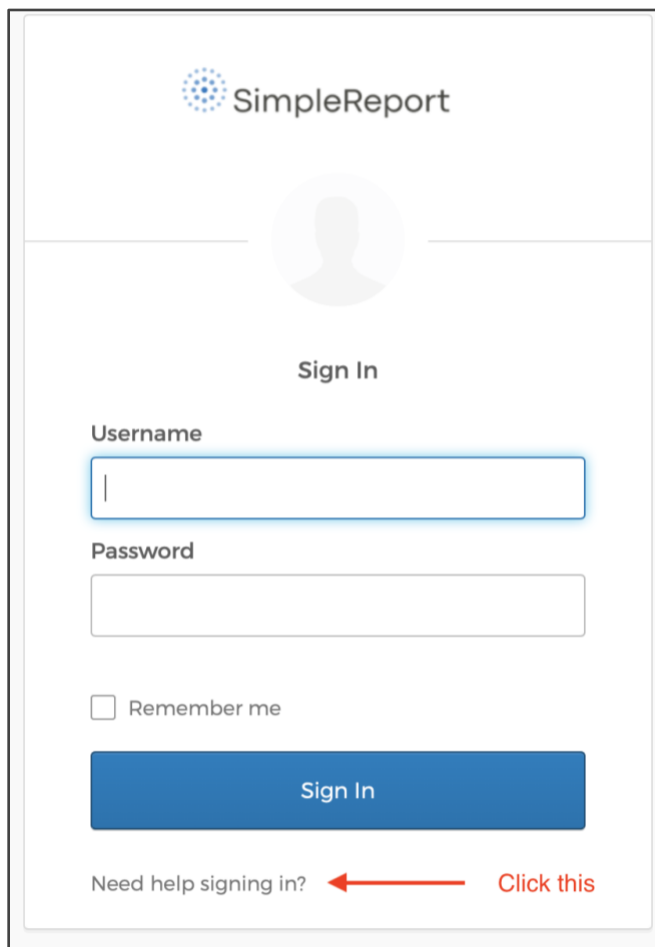
## Step 1:

To reset your password, go to <https://hhs-prime.okta.com/signin/forgot-password> Enter your email and click the “Reset Via Email” button.



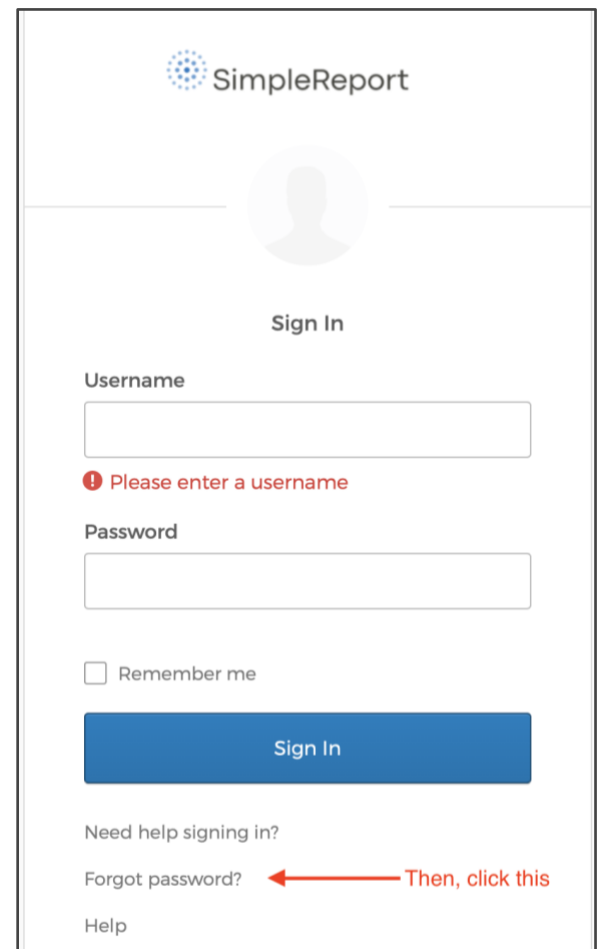
The image shows the 'Reset Password' form on the SimpleReport website. At the top is the SimpleReport logo. Below it, the title 'Reset Password' is centered. There is a label 'Email or Username' above a text input field. Inside the input field, the text 'Your email goes here' is written in red. Below the input field is a large blue button labeled 'Reset via Email'. At the bottom left, there is a link 'Back to Sign In'.

You can also get here from the SimpleReport sign-in page if link:



The image shows the 'Sign In' form on the SimpleReport website. At the top is the SimpleReport logo. Below it is a placeholder for a user profile picture. The title 'Sign In' is centered. There are two input fields: 'Username' and 'Password'. Below the 'Password' field is a checkbox labeled 'Remember me'. At the bottom is a large blue button labeled 'Sign In'. Below the button, there is a link 'Need help signing in?' with a red arrow pointing to it and the text 'Click this' in red.

you click the “Need help signing in?” text



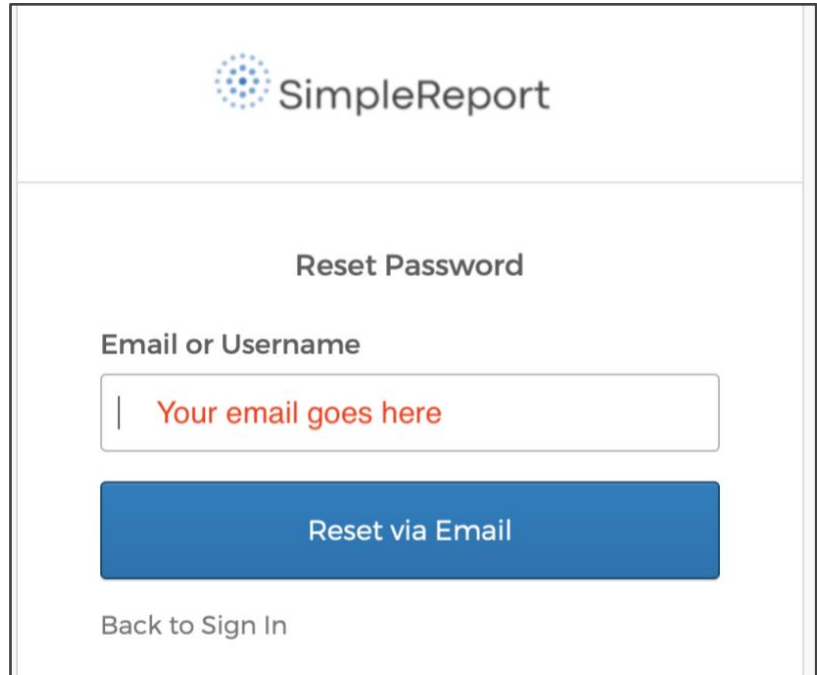
The image shows the 'Sign In' form on the SimpleReport website after an error. At the top is the SimpleReport logo. Below it is a placeholder for a user profile picture. The title 'Sign In' is centered. There are two input fields: 'Username' and 'Password'. Below the 'Username' field, there is a red error message: 'Please enter a username'. Below the 'Password' field is a checkbox labeled 'Remember me'. At the bottom is a large blue button labeled 'Sign In'. Below the button, there are three links: 'Need help signing in?', 'Forgot password?', and 'Help'. A red arrow points from the text 'Then, click this' to the 'Forgot password?' link.

**Step 2:**

Enter your email address that you used to sign up for SimpleReport and click the “Reset via Email” button.

**Step 3:**

Check your email for a message to reset your password. Click the link in the email, and you will be able to pick a new password for your account.



The image shows a web form for resetting a password on the SimpleReport platform. At the top, the SimpleReport logo is displayed. Below the logo, the title "Reset Password" is centered. Underneath the title, the label "Email or Username" is positioned above a text input field. The input field contains the placeholder text "Your email goes here" in red. Below the input field is a prominent blue button with the text "Reset via Email". At the bottom of the form, there is a link labeled "Back to Sign In".

SimpleReport

Reset Password

Email or Username

| Your email goes here

Reset via Email

[Back to Sign In](#)

# Troubleshooting Issues & Getting support

## Step 1:

If you're having general trouble with SimpleReport, here's a few common troubleshooting tips:

- Try logging out and logging back into your account
- Reboot your device
- Refresh the website by pulling down on the tab or click the refresh button
- Check your internet connection to make sure it's receiving data from other sites

## Step 2:

If that doesn't fix it, please contact [USDS@CDC.gov](mailto:USDS@CDC.gov) with information about the problems you're seeing. Please share any screenshots of the issue and as clearly as you can explain what is happening, what is expected, and what's going wrong, and we'll follow up to help.