



SimpleReport Site Onboarding Guide

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Onboarding Next Steps

Welcome to SimpleReport! Below is a simple checklist that will help you keep track of the requested items. After you have completed all the steps on the checklist and confirmed that your staff members have successfully authenticated their SimpleReport login accounts, and completed SimpleReport training, you'll be ready to go live!

Organization and Facility Settings

In order to get an account, you MUST fill out a [SimpleReport Account request form](#). **This form should be completed for EACH of the facilities where you plan on performing testing.** You will also be able to add additional facilities after this initial account has been established. It is important that the names used on this form to identify these locations are accurate as these will be the names reported to the Public Health Department.

Administrator Login

Each organization will also have an “administrator”. **The first administrator at each organization will go through a verification process to get their login accounts.** They will receive a DocuSign “envelope” at their email address that will need to be signed. After the DocuSign is completed, they will schedule an “identity proofing” session where they will need to show an approved ID. After this session, they will receive their SimpleReport login information.

Staff Access

Everyone at your site who will need to use SimpleReport as a part of the testing workflow will need to have their own individual account (hosted by HHS OKTA) to log in. In order to set these up, as the administrator, [you can invite additional staff members within SimpleReport](#) by providing their name and email address. This information will then be used to create a SimpleReport login account for each individual. All staff members should confirm receipt of their SimpleReport account and verify that they are able to login prior to scheduling the training session. Detailed instructions for account set up can be found in the SimpleReport User Guide or on the SimpleReport.gov [resource page](#). Staff members should also request to join the USDS-CDC google group so they will receive any alerts or updates regarding SimpleReport.

If you encounter any **problems creating your SimpleReport login account**, please contact support@simplereport.gov. If you need to **reset your password**, go to the following link: <https://hhs-prime.okta.com/signin/forgot-password>. Detailed instructions are also [available on our resource page](#).

Onboarding Checklist

Organization Information

- ☐ Request a SimpleReport Account for your site through [this form](#). If your organization has multiple sites, please submit a separate request for each site location.
 - Note: The name of your site will be reported to the Public Health Department exactly as it is listed on this form.

Administrator Verification

- ☐ Complete DocuSign Documents
- ☐ Schedule ID Verification session
- ☐ Attend 15 minute ID Verification session

Staff Access

- ☐ [Create an account in SimpleReport for each individual who will need access](#) to a SimpleReport testing account as a part of the COVID-19 testing workflow.
 - ☐ ALL identified staff members receive SimpleReport OKTA login information
- ☐ ALL identified staff members MUST confirm that SimpleReport OKTA login works properly
- ☐ ALL identified staff members must sign up to get alerts from the USDS-CDC Google group
- ☐ ALL identified staff should review the SimpleReport user guide

Schedule Training Session

- ☐ Watch [training videos](#) at your own pace.
OR
- ☐ Email support@simplereport.gov to schedule your training session once all the above steps have been completed.

Confirm Organization Information

- ☐ Review your facility settings (facility name, testing devices, ordering provider information, etc.) to make sure all your information is correct
- ☐ Review your user settings to make sure all necessary staff members have accounts

Start Testing