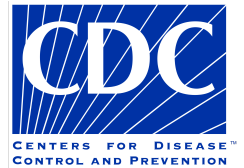




# SimpleReport

## User guide



Version 2.0 – 12/14/2023  
[What's new in this version\\*](#)

**Note:** The User guide may not reflect the most up-to-date version of SimpleReport. To ensure you see the latest version of guidance, we recommend checking [“Using SimpleReport” on the SimpleReport website](#).

## Contents

<b>Getting started</b>	<b>3</b>
How to sign up for SimpleReport	3
SimpleReport sign-up checklist	3
Fill out your organization information	3
Enter your personal contact details	3
Verify your identity	4
(optional) Get training	4
Activate your organization or user account	4
Multi-factor authentication options	5
SMS authentication	6
Google Authenticator or Okta Verify	6
Log in to SimpleReport	8
Get training	9

<b>Using SimpleReport</b>	<b>9</b>
Select your testing facility	9
Report results	10
Conduct and submit tests	10
Bulk upload results	14
Backdate a test	17
Manage results	18
Review test results	18
Send someone’s test results	19
Download test results	20
Correct a previous test result	20
See upload history	22
Manage people you test	23
Add a new patient	24
Bulk upload patients	25
Self-registration	29
Archive a patient	30
Update someone’s profile	30
Manage users	31
Manage user permissions	31
Add new user	32
Edit user information	33
Reactivate user	34
Reset user password	35
Reset user MFA	36
Manage facility info	37
Add a testing facility or location	37
Update testing facility settings	39
Test for other diseases	40
Influenza A and B	40
Reset your SimpleReport password	41
<b>Contact us</b>	<b>44</b>
<b>What’s new in this version</b>	<b>44</b>



# Getting started

## How to sign up for SimpleReport

If you're doing rapid point-of-care testing, your first step is to choose just one person to sign up for your organization account. They'll create the account and complete identity verification. This person – called the account administrator – can add testing facilities and staff after creating the organization account.

### Organizations and facilities

What's an organization? Organizations are companies, institutions, school systems, and more, that often have multiple testing facilities or locations as part of their network. For example, John Doe School District is the "organization" that includes Highland High School, Middleton Middle School, etc.

Each individual school is considered a "testing facility" that must be connected to its parent organization in SimpleReport. If you don't have a parent organization that's ok – you'll just enter in your information a bit differently when you sign up.

Let's get started.

### SimpleReport sign-up checklist

Complete the following steps to start using SimpleReport:

- Fill out your organization information
- Enter your personal contact details
- Verify your identity
- (optional) Get training

### Fill out your organization information

You'll fill out basic information about your organization and your work contact details as part of our [SimpleReport organization sign up](#).

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.

## Enter your personal contact details

As the organization administrator, you'll provide your personal contact information to help verify your identity.

## Verify your identity

You'll answer identity verification questions with our verification partner, Experian. This takes just a few minutes and doesn't impact your credit score.

If Experian can't 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. We recommend a driver's license 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:

- [Practice using SimpleReport](#) using sample data, and get familiar with different features.
- Watch these [quick training videos](#).
- Check out our step-by-step instructions for [using SimpleReport](#).

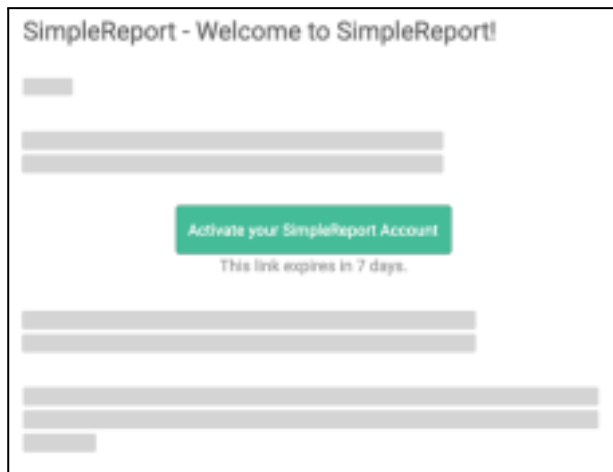
**Add testing facilities and staff:** Once you're all set up in SimpleReport you can [invite other staff members](#) or [add more facilities](#).

## Activate your organization or user account

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

Once you receive your account activation email, follow these steps:

1. Click the 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.

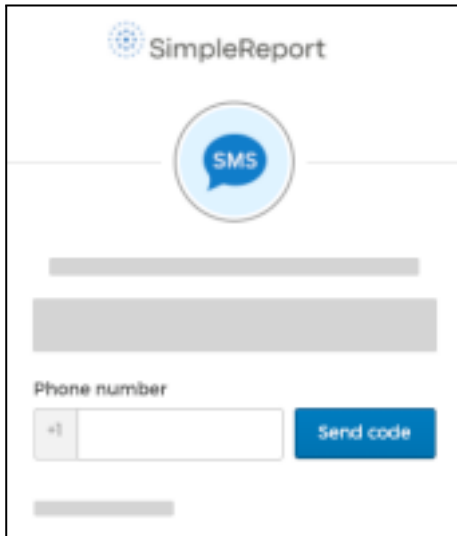
You can now [log in to SimpleReport](#).

## 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

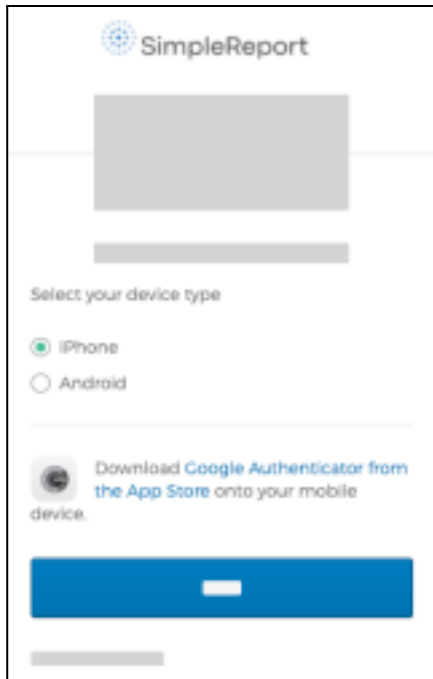
1. Enter your phone number, then click Send code. (Make sure to click Send code, or you won't be able to continue.)

A screenshot of the SimpleReport SMS authentication interface. At the top left 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 grey rectangular input fields. Below these is the text 'Phone number' followed by a small grey box containing '+1' and a larger white input field. To the right of the input field is a blue button with the text 'Send code'. At the bottom of the form is another grey rectangular input field.

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**.



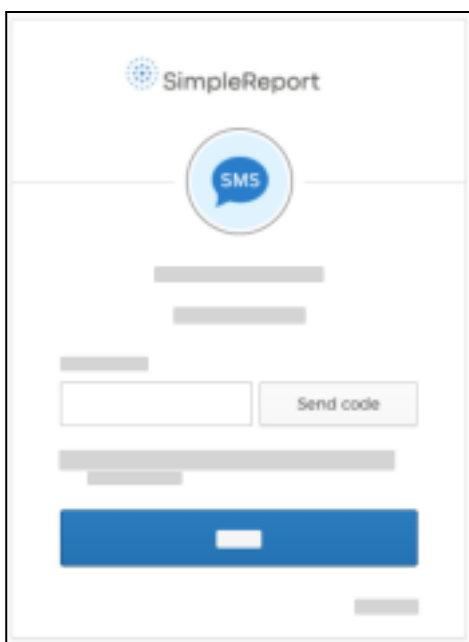
4. Back on your phone, the app will show you a code. Enter the code on the registration page, then click **Verify**. (The code changes regularly, so you'll need to check the app each time you log in to SimpleReport.)

## 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](https://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 SimpleReport](#).

## Get training

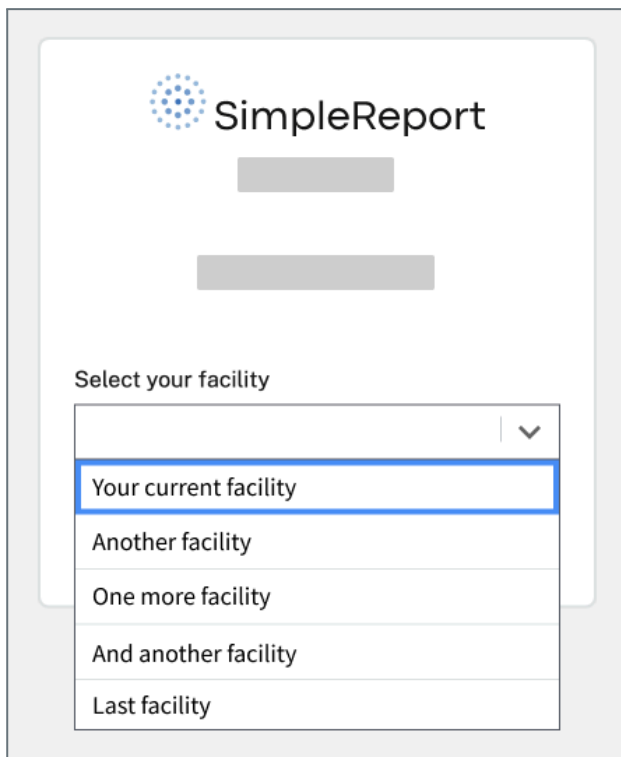
Check out our resources to get familiar with SimpleReport's testing, reporting, and workflow features.

- Check out our video [introduction and onboarding guide](#).
- Practice using SimpleReport and take a look around on our [demo 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](#).



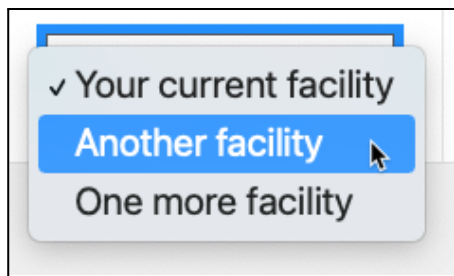
The screenshot shows the SimpleReport login page. At the top, there is the SimpleReport logo and two grey rectangular input fields for email and password. Below these fields is a dropdown menu titled "Select your facility". The dropdown menu is open, showing five options: "Your current facility" (highlighted with a blue border), "Another facility", "One more facility", "And another facility", and "Last facility".

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.



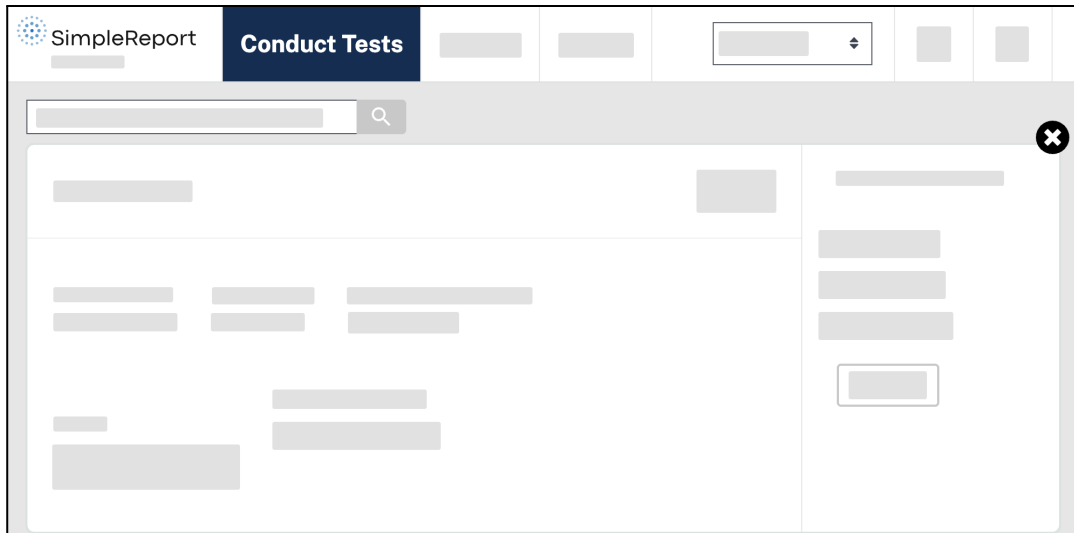
## Report results

### Conduct and submit tests

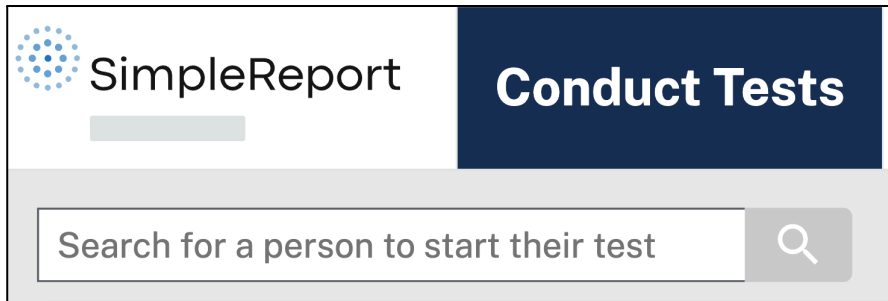
Once you've [logged in to SimpleReport](#), you can begin conducting tests and submitting results to your public health department. You also have the option to [upload results in bulk](#).

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

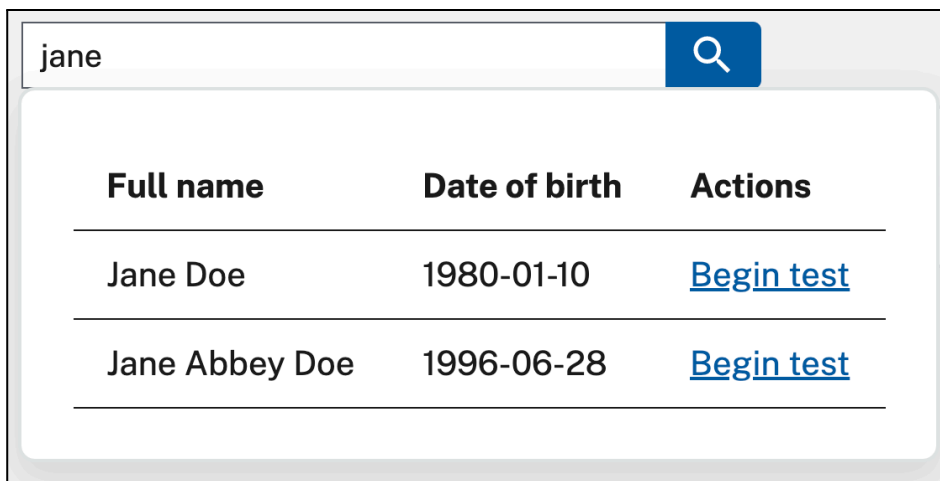
page.



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

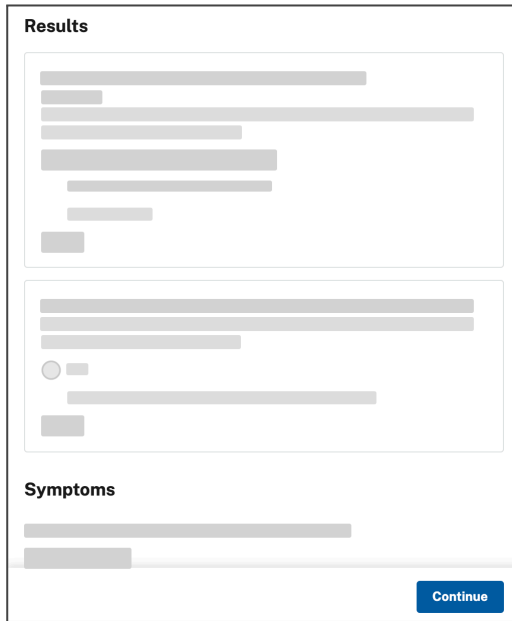


3. Confirm the patient's full name and date of birth. Then click **Begin test** to the right of their name.



If the patient 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 patient you're testing will need to answer a test questionnaire.

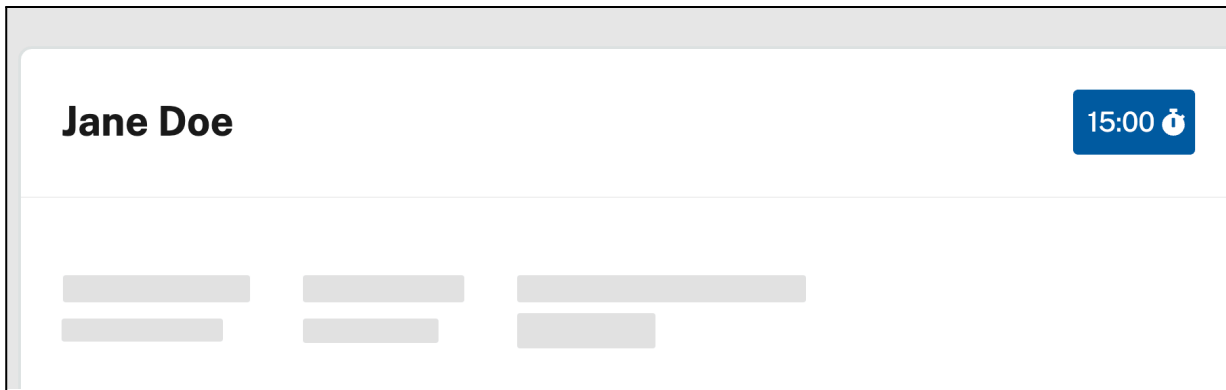
A screenshot of a patient questionnaire form. The form is divided into two main sections: 'Results' and 'Symptoms'. The 'Results' section contains several horizontal bars of varying lengths, representing text input fields. The 'Symptoms' section also contains horizontal bars for text input. At the bottom right of the form, there is a blue button labeled 'Continue'.

The first question asks the patient how they want to get their result. If they choose to get their result by text or email, they'll get a notification as soon as you submit their result in SimpleReport. (The text and email messages include a link to a secure portal to check their result.) If they don't want their results via text or email, you can also [print a copy](#). The questionnaire also has a section to enter information about any symptoms the patient may have at the time of the test.

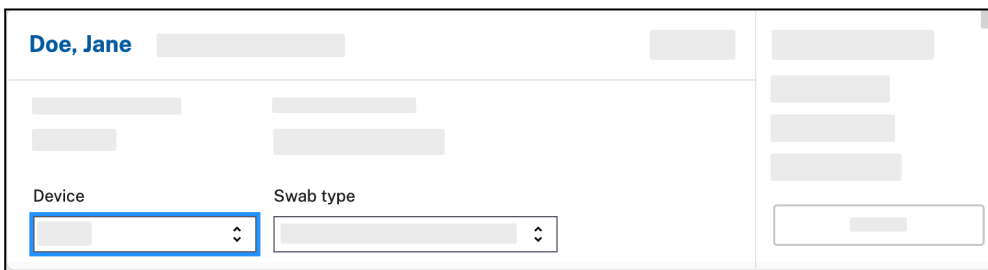
You can ask these test questions now, or click **Continue** and come back to them later. Either way, you'll need to complete them before submitting test results.

5. The patient'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.
6. Collect the swab from the patient you're testing and prepare their sample.
7. (*optional*) On the patient'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

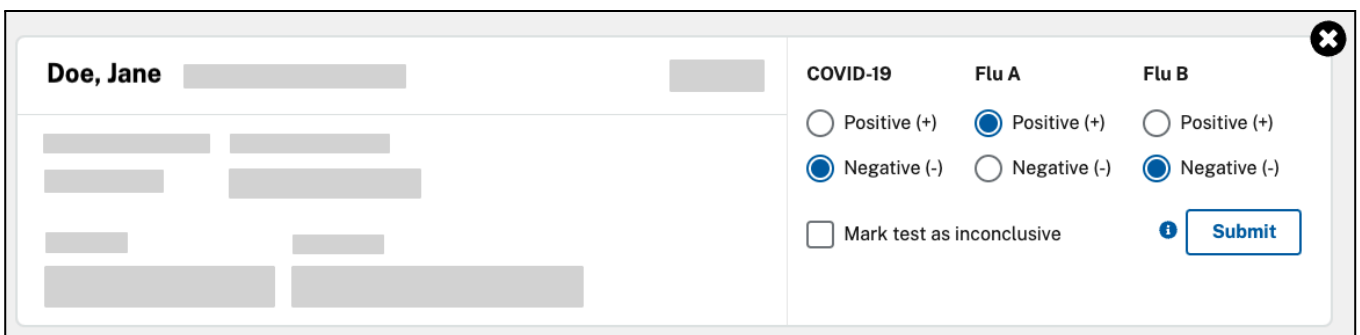
time by clicking the blue button again.



- You'll have the option to select the testing device and swab type from the dropdowns. Make sure you select the correct device and swab type. (It defaults to the last device used.) If the device or swab type you're using isn't on the list, ask an administrator to [add the device or swab type 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.



- Once the test is complete, select the result of the test on the right side of the patient's card: "Positive", "Negative", or "Inconclusive".
- If the device you're using also tests for flu (a "multiplex device"), you'll see columns for flu A and B results next to the COVID-19 column. You must enter "Positive" or "Negative" for each illness, or select "Inconclusive" for all three before you can submit.



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 patient 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](#).

## Bulk upload results

Once you log in to SimpleReport, you can start using it to report results to your public health department. You have the option to [submit tests one-by-one](#) using a simple form, or you can upload results in bulk using a spreadsheet.

### About the upload feature

SimpleReport's bulk results uploader lets you report multiple test results at once using a CSV file. When you submit your results, the uploader tool verifies the data, then sends your results to the relevant state and/or local health department(s).

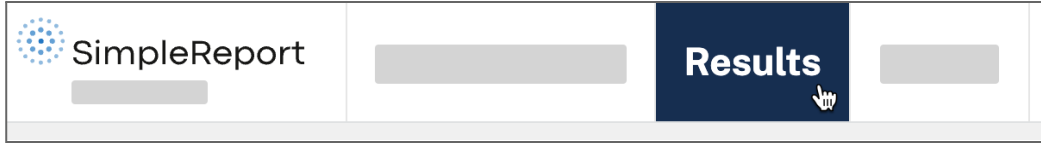
The results uploader is connected with all [states partnered with SimpleReport](#). If you report to multiple jurisdictions, you can share results with them using one spreadsheet. SimpleReport routes data to the appropriate health departments based on the facility location and patient address fields in your CSV.

The SimpleReport data template is a blend of test data requirements from the Department of Health and Human Services, along with other public health jurisdictions. Following SimpleReport formatting requirements ensures that your data will be accepted by any state, tribal, local, or territorial health department partnered with SimpleReport. Learn more about the data template on the guide in the [training site](#), or follow instructions below to find it on your SimpleReport account.

## How to upload results

To upload your results on SimpleReport using a CSV file:

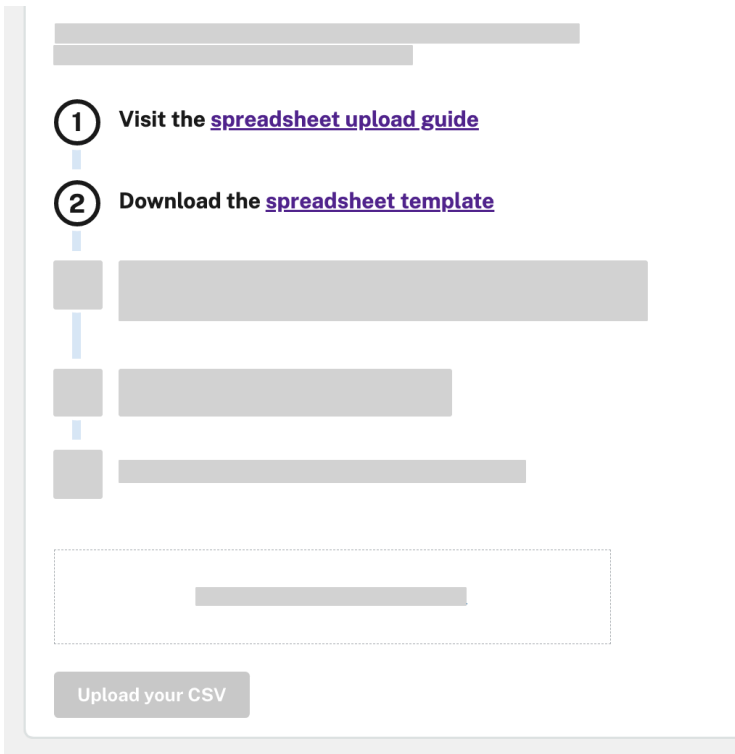
1. Click Results at the top of the page.



2. Go to the Upload spreadsheet tab underneath the main navigation bar.

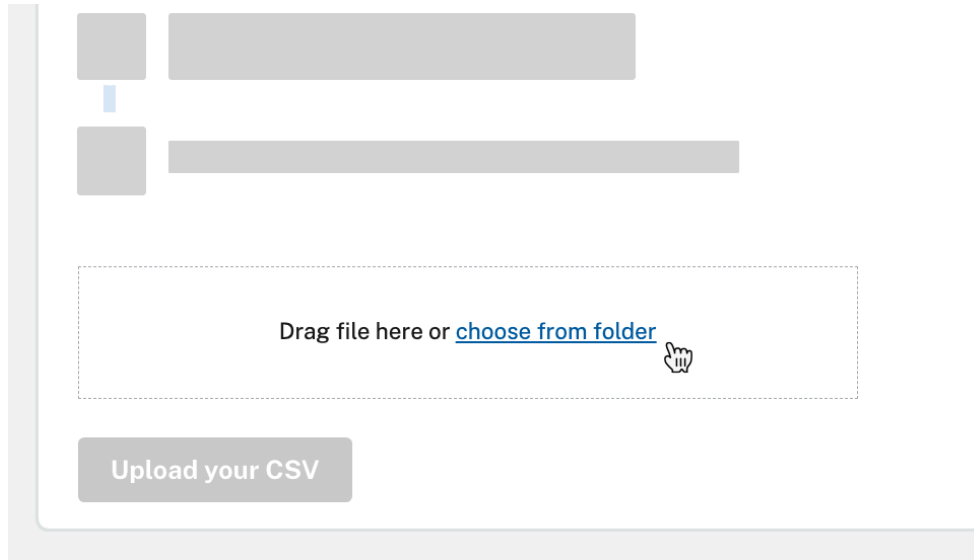


3. Click on the link to visit the “spreadsheet upload guide.” This contains important information about how to format your results CSV. You can also “download the spreadsheet template” to see example data.

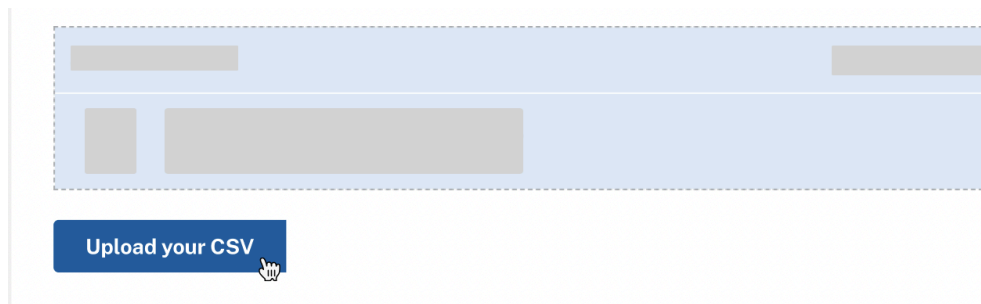


4. Follow the guide closely to match the headers and data in your spreadsheet to the SimpleReport requirements. Any formatting mismatches will result in errors when you upload your spreadsheet.

- Once you format your data, make sure to save your spreadsheet in CSV format. If your file is larger than 50 MB or 10,000 rows, you need to separate it into multiple spreadsheets.
- Drag your CSV file into the upload box, or click [choose from folder](#) to select it from your computer browser.




- Click the Upload your CSV button.



- SimpleReport will check to make sure your data is in the correct format before sending it to any health departments. If the data is correct, you'll see a success message. If the data is incorrect, SimpleReport



will show an error message, with guidance below about what you need to fix.

 **Error: File not accepted**  
Please resolve the errors below and upload your edited file. Your file has not been accepted.

Requested Edit	Areas Containing the Requested Edit
[Redacted]	[Redacted]
[Redacted]	[Redacted]
[Redacted]	[Redacted]
[Redacted]	[Redacted]

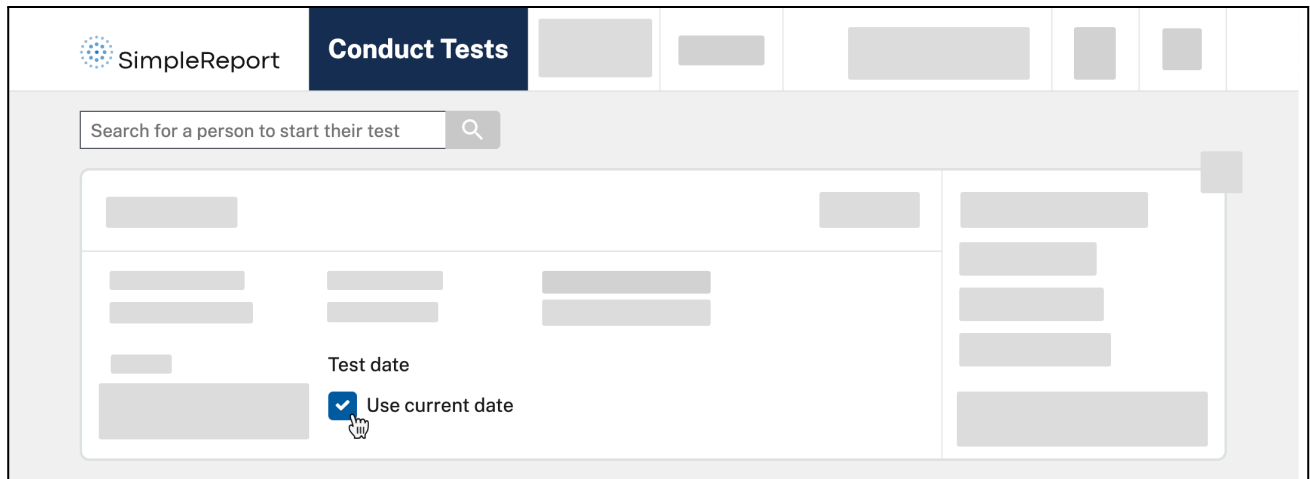
9. Following the error message guidance, edit your spreadsheet and save it again. Try uploading it again (step 6). You may need to repeat steps 6–8 until SimpleReport successfully accepts your results spreadsheet.

Once you successfully upload your spreadsheet, SimpleReport will send your results to the appropriate health department(s). You don't need to take any other steps to report. To see the files you've reported, [visit your upload history](#).

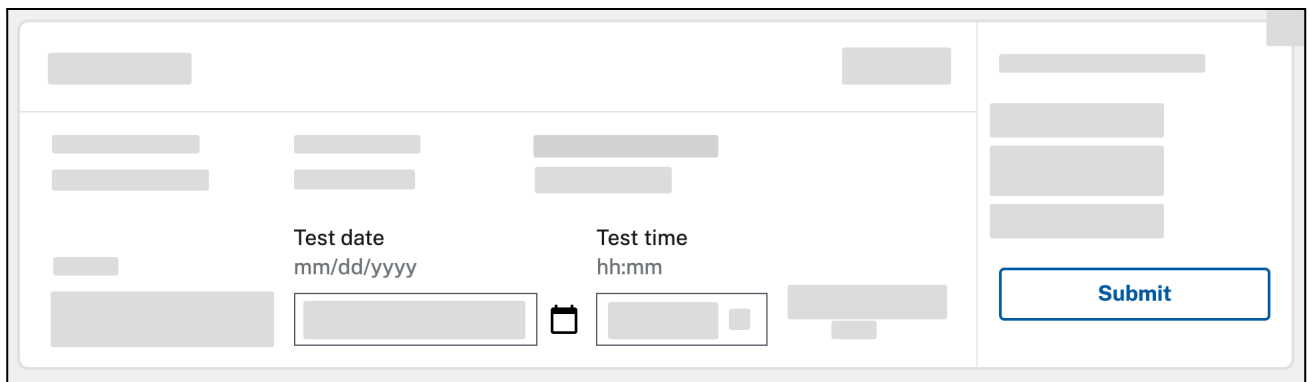
## Backdate a test

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**



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



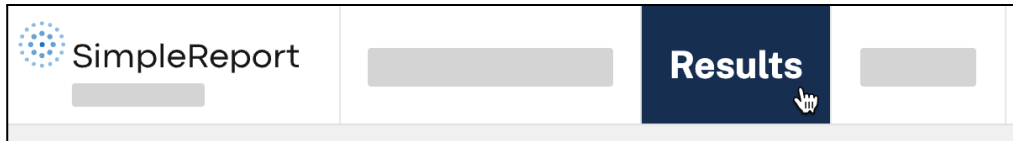
## Manage results

### Review results

If you work for a testing facility and submit tests one by one, you can find your patients' results using these steps.

If you upload results in bulk, visit your [upload history](#) instead. Results you submit to SimpleReport through a spreadsheet do not appear as individual entries in the Results page.

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



2. A table of results from your testing facility will appear showing the most recent 20 results. Click through pages to see older results, or you can filter at the top for patient name, date range, test result, role, and testing facility. Note: This does not include results uploaded to SimpleReport with a spreadsheet..

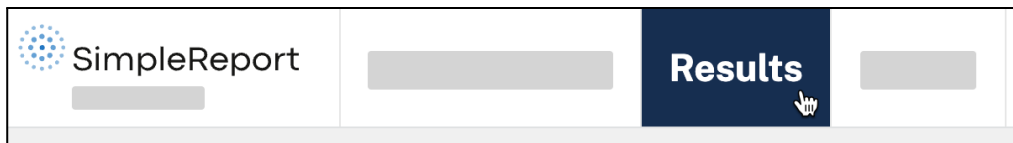
If there's a problem with any result, you can [mark it as an error](#).

## Send someone's test results

You can send or resend test results to patients through SimpleReport.

To send or resend someone's test result:

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

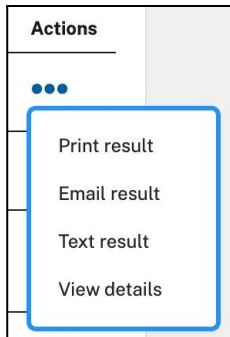


2. A table of results from your testing facility will appear showing the most recent 20 results. Click through pages to see older results, or you can filter at the top for patient name, date range, test result, role, and testing facility.

- Find the result that you want to send, 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 send.

Test Results (all)				
				Actions
Jane Doe				...

- Select the option you want then select **Print result**, **Email result**, or **Text result**.



- A preview of the test result will appear. Select the option you want and follow the instructions to print, email, or text the result.

## Download test results

You can filter results by name, test date, test result, or role and download them as a CSV file to your computer.

- To download test results:
- Enter the information to filter and select the type of test results you want to download. Filters are any of the categories at the top of the page, for example a test date or range, a type of result, and/or results from a certain test group (role) such as staff, students, visitors, etc.

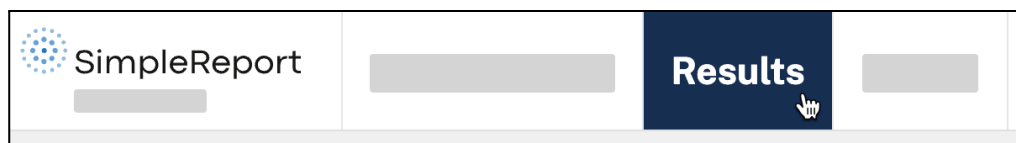
3. Select **Download results** and confirm. The results with the filters you selected will download to your computer.
4. To view other test results or start a new download, select **Clear filters**.

## 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. Make sure to also submit a new, corrected test result (backdated to the original test date) after completing the steps here.

To correct a previous test result:

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

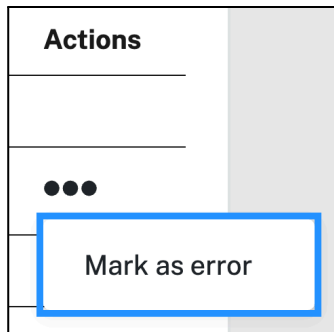


2. A table of results from your testing facility will appear showing the most recent 20 results. Click through pages to see older results, or you can filter at the top for patient name, date range, test result, role, and testing facility.

- 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				...

- Click **Mark as error**.



- 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.

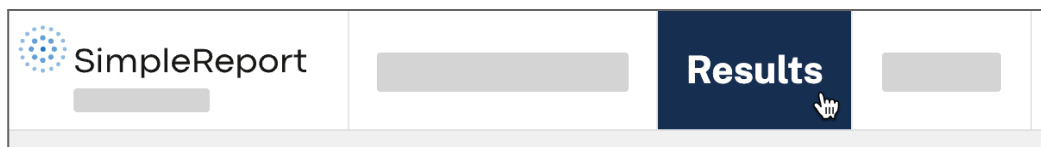
Test Results (all)				
Person Name	Date of Test	Result	Device	Actions
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
Jane Doe	Feb 12, 2021 11:54 AM	NEGATIVE	Abbott IDNow	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

To submit a new, corrected result to replace the one now marked as an error, 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 (you may need to backdate it).

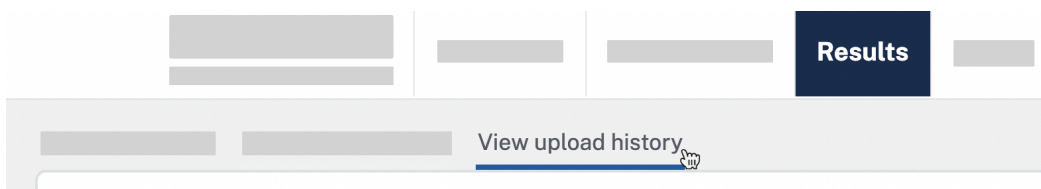
## See upload history

When you report your results by [uploading a spreadsheet](#) to SimpleReport, individual results do not appear in the **Results** page. Instead, you can find general information about the spreadsheet in the **Upload history** tab:

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

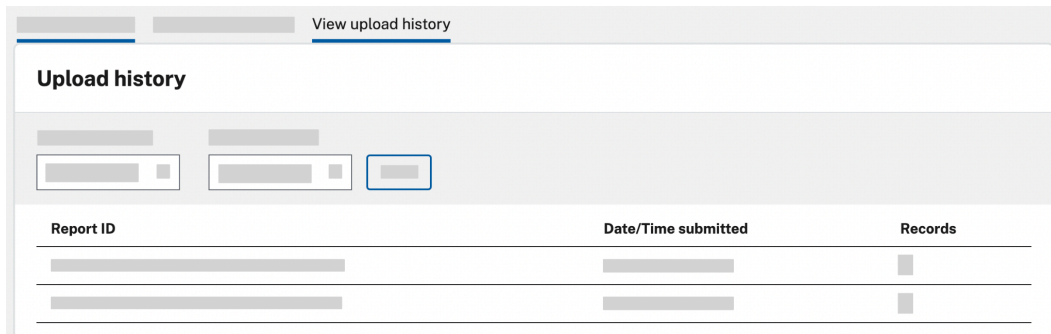


2. Go to **View upload history** underneath the main navigation bar.

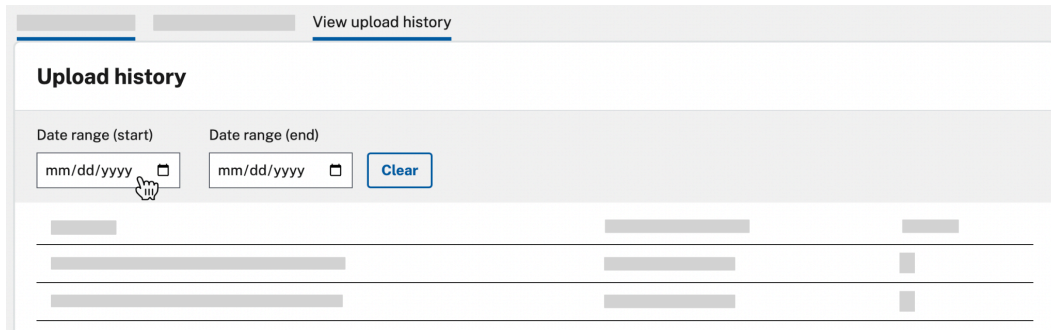


3. In a table, you'll see information about spreadsheets previously submitted by your organization. Information includes the unique report ID the system assigns to a CSV when it's uploaded; the date and

time it was submitted; and the number of records – or test results – included in the spreadsheet.



4. To search for a specific time range, enter dates in the “Date range (start)” and “Date range (end)” fields.



## Manage people you test

### Add a new patient

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 patient 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.

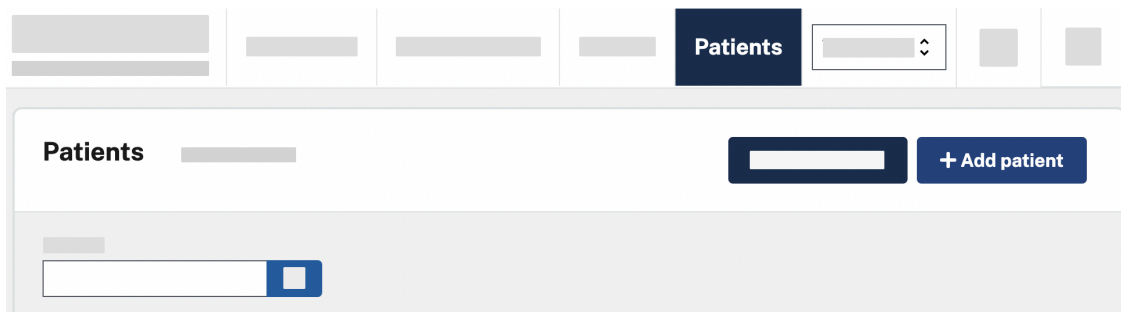
To add someone new:

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





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



3. Enter the person’s information on the “Add new patient” 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 patient 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 patient 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 patient, learn how to [conduct and submit tests](#).

## Bulk upload patients

To report results for patients in SimpleReport, you first need to add their information to the system. You can [add people individually](#), ask them to [register themselves](#), or upload multiple people at once using a spreadsheet. This page guides you through the bulk upload process, including how to format your spreadsheet and how to upload it.

## Preparing your spreadsheet data

Before you upload your spreadsheet on SimpleReport, make sure your patient data closely follows the guidance below. You can also refer to the spreadsheet template with example data. In general, you must:

- ✓ **Match all your field headers to the column names listed below**
- ✓ **Include all required columns below in your CSV**
- ✓ **Include values in all required fields, following guidance below**
- ✗ **Leave out text in cells for optional fields you don't want to include (for example, don't write "N/A" in a field)**

Note: If you want to add certain patients to specific facilities in your organization, create a separate spreadsheet for each facility (for example, if you work for a school district, you can create a file for each school that includes the relevant students and staff). If you want to add the same patients across facilities, you can create one spreadsheet and upload patients to all facilities in your organization.

## Data elements

Column name	Required?	Format	Notes
last_name	Yes	Any	
first_name	Yes	Any	
middle_name		Any	
suffix		Any	
race	Yes	Select from these values: <ul style="list-style-type: none"><li>• American Indian or Alaska Native</li><li>• Asian</li><li>• Black or African American</li><li>• Native Hawaiian or other Pacific Islander</li><li>• White</li><li>• Other</li><li>• Unknown</li><li>• Ask but unknown</li></ul>	
date_of_birth	Yes	MM/DD/YYYY, M/D/YYYY, M/D/YY, or MM/DD/YY	• <b>Yes:</b> 07/01/1993

- **Yes:** 7/1/1993
- **Yes:** 7/1/93

<b>biological_sex</b>	<b>Yes</b>	Select from these values: <ul style="list-style-type: none"> <li>• Male</li> <li>• Female</li> <li>• Other</li> <li>• Ambiguous</li> <li>• Unknown</li> <li>• Not applicable</li> </ul>	
<b>ethnicity</b>	<b>Yes</b>	Select from these values: <ul style="list-style-type: none"> <li>• Hispanic or Latino</li> <li>• Not Hispanic or Latino</li> <li>• Unknown</li> </ul>	
<b>street</b>	<b>Yes</b>	500 characters or fewer.  If address is unknown or patient is unhoused, write ** Unknown / not given ** in this field.	
street_2		500 characters or fewer	
city		500 characters or fewer	
county		500 characters or fewer	
<b>state</b>	<b>Yes</b>	Any 2-character state or US/Canada territory code.  If address is unknown or patient is unhoused, write NA in this field.	<ul style="list-style-type: none"> <li>• <b>Yes:</b> CA</li> <li>• <b>Yes:</b> MO</li> <li>• <b>No:</b> Arkansas</li> </ul>
country		Any 3-letter country code	If you leave this blank, it will default to USA.
<b>zip_code</b>	<b>Yes</b>	00000 or 00000-0000.  If address is unknown or patient is unhoused, write 000000 in this field.	<ul style="list-style-type: none"> <li>• <b>Yes:</b> 53421</li> <li>• <b>Yes:</b> 53421-7890</li> </ul>
<b>phone_number</b>	<b>Yes</b>	000-000-0000	<ul style="list-style-type: none"> <li>• <b>Yes:</b> 123-456-7890</li> <li>• <b>No:</b> (123) 456-7890</li> </ul>
<b>phone_number_type</b>	<b>Yes</b>	Select from one of these values: <ul style="list-style-type: none"> <li>• Mobile</li> <li>• Landline</li> </ul>	
<b>employed_in_healthcare</b>	<b>Yes</b>	Select from one of these values: <ul style="list-style-type: none"> <li>• Y or Yes</li> <li>• N or No</li> <li>• Unk or Unknown</li> </ul>	

<b>resident_congregate_setting</b>	<b>Yes</b>	Select from one of these values: <ul style="list-style-type: none"> <li>• Y or Yes</li> <li>• N or No</li> <li>• Unk or Unknown</li> </ul>	
role		If including, select from one of these values: <ul style="list-style-type: none"> <li>• Staff</li> <li>• Resident</li> <li>• Student</li> <li>• Visitor</li> <li>• Unknown</li> </ul>	If you leave this blank, it will default to Unknown.
gender_identity		If including, select from one of these values: <ul style="list-style-type: none"> <li>• Female</li> <li>• Male</li> <li>• Transwoman</li> <li>• Transman</li> <li>• Nonbinary</li> <li>• Other</li> <li>• Refused</li> </ul>	
address_notes	Any		Details about a patient's location or alternative contact information

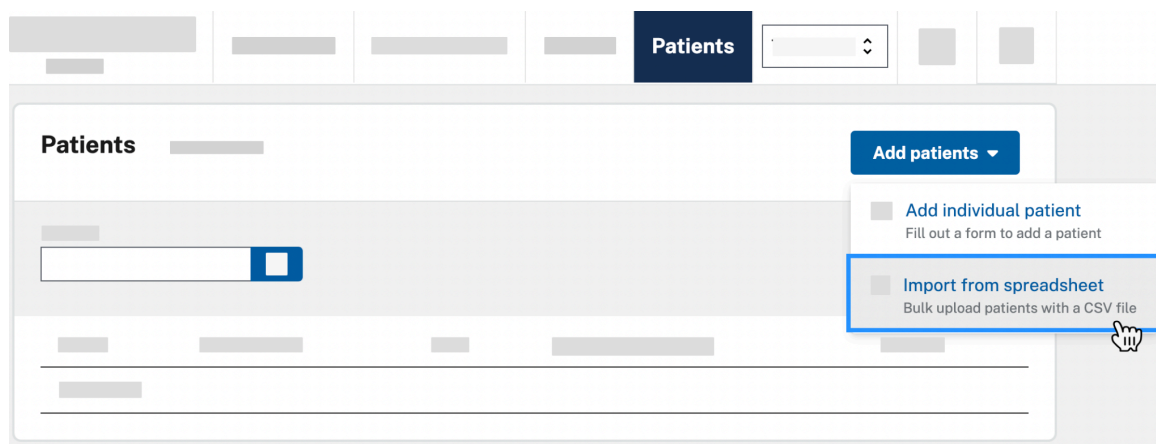
## Uploading your patient CSV

To upload your patient spreadsheet to SimpleReport, follow these steps:

1. Make sure the patient data in your spreadsheet matches formatting requirements. SimpleReport will validate your data when you upload the CSV, and any errors will prevent you from successfully submitting results (you'll have the chance to fix errors and resubmit).
2. When you're ready to upload your spreadsheet, click **Patients** at the top of the page.



3. Click the **Add patients** button at the top right of the screen. From the dropdown menu that appears, select Import from spreadsheet.



4. If you've already formatted your data, skip to the second step on this page. To add the patients in your spreadsheet to a single facility, select "One facility." To add the patients to all facilities in your organization, select "All facilities." You can't select a subset of facilities in your organization.

If you want to add certain patients to specific facilities in your organization, create a separate spreadsheet for each facility (for example, if you work for a school district, you can create a file for each school that includes the relevant students and staff).

## 2. Would you like to import these patients to one facility OR all facilities?

Two horizontal grey bars representing input fields for facility selection.

One facility     All facilities

Which facility?

A horizontal grey bar representing an input field for selecting a specific facility.

5. Drag your CSV file into the upload box, or choose it from your computer browser. Once the right file is selected, click **Upload CSV file**.
6. SimpleReport will check to make sure your data is in the correct format. If the data is incorrect, SimpleReport will show an error message, with guidance below about what you need to fix.

- (If you get errors) Following the error message guidance, edit your spreadsheet and save it again. Try uploading it again (step 5).
- Once SimpleReport confirms that your data is properly formatted, it will process and add the patients. This can take up to 10 minutes or more. The process will continue even if you leave SimpleReport, and we'll send an email to alert you when it's done.

Once you get an email confirming the upload is complete, you can view and report test results for the new patients on SimpleReport.

## 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:

- 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.

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.

## Archive a patient

Archiving a patient removes them from your list of patients. Because it's archived and not deleted, their record will still be accessible if it needs to be recovered later. (To unarchive a patient, you'll need to [contact SimpleReport support](#).)

To archive a patient:

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



2. Click on the name of the patient whose profile you want to update.
3. A page with all of the patient’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 “Patient” 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

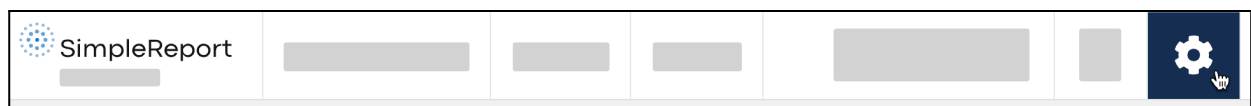
### Manage user permissions

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 users” tab. Click “Facility access” below.



**Manage users**

**Facility access**

**User role**  
*Admins have full access to use and change settings on SimpleReport. Standard and testing-only users have limited access for specific tasks, as described below.*

- Admin  
Full access: Conduct tests, manage test results and patient profiles, manage account settings, users, and testing facilities.
- Standard user  
Conduct tests, manage test results, and patient profiles
- Testing only  
Conduct tests

- Under “User role”, click the user whose access you want to edit.
3. Select the access level you want to give this user. There are three levels of access: “Admin”, “Standard”, and “Testing only”:
- **Admin** users have full access to conduct and report tests, manage test results, manage patient profiles, and manage testing facility and user (staff) settings.
  - **Standard** users can conduct and report tests, manage test results, and manage patient profiles. They can’t manage testing facility or user (staff) settings.
  - **Testing only** users can only conduct and report tests.

**Manage users**

**Facility access**

**User role**  
*Admins have full access to use and change settings on SimpleReport. Standard and testing-only users have limited access for specific tasks, as described below.*

- Admin  
Full access: Conduct tests, manage test results and patient profiles, manage account settings, users, and testing facilities.
- Standard user  
Conduct tests, manage test results, and patient profiles
- Testing only  
Conduct tests

- 5. Select the testing facilities you want the user to access. Non-admins can access up to 30 facilities.

6. Click **Save changes**.

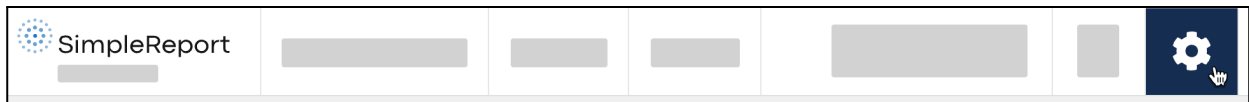
The next time this user logs in to SimpleReport, they'll have the level of access that you just set.

## Add new user

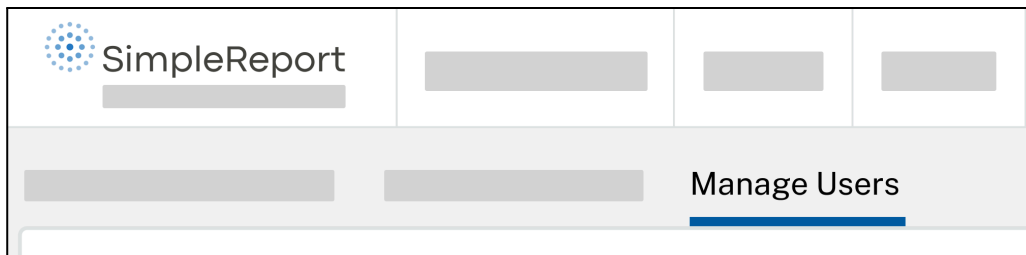
Admins can give staff and employees SimpleReport access by adding them directly in SimpleReport.

To add 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 **+ Add user** in the top right corner.
4. Enter the first name, last name, and email address of the person you want to add. Select their access level to user control permissions. Finally, choose which testing facilities they can access. Non-admin users can access up to 30 facilities.

**Invite new user**
✕

---

**First name \***

**Last name \***

**Email address \***

**Access level \***

Standard user (conduct tests, manage test results and patient profiles) ▾

**Testing facility access \***

All users must have access to at least one facility

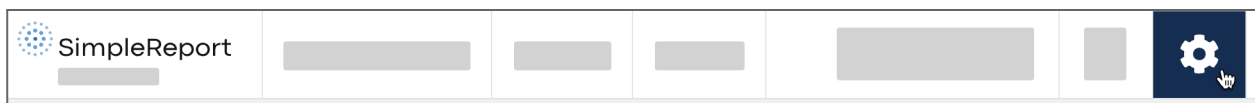
- Click **Send invite**. The person you invited will receive an email with a link to sign up for a SimpleReport account. Once you send the invite, you can change the user's access level by following the instructions to manage user permissions.

## Edit user information

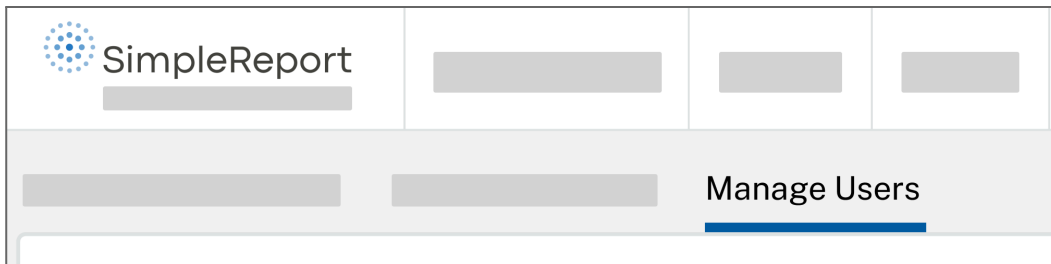
Admins can update or edit basic user information such as name and email for staff and employees.

To edit user information:

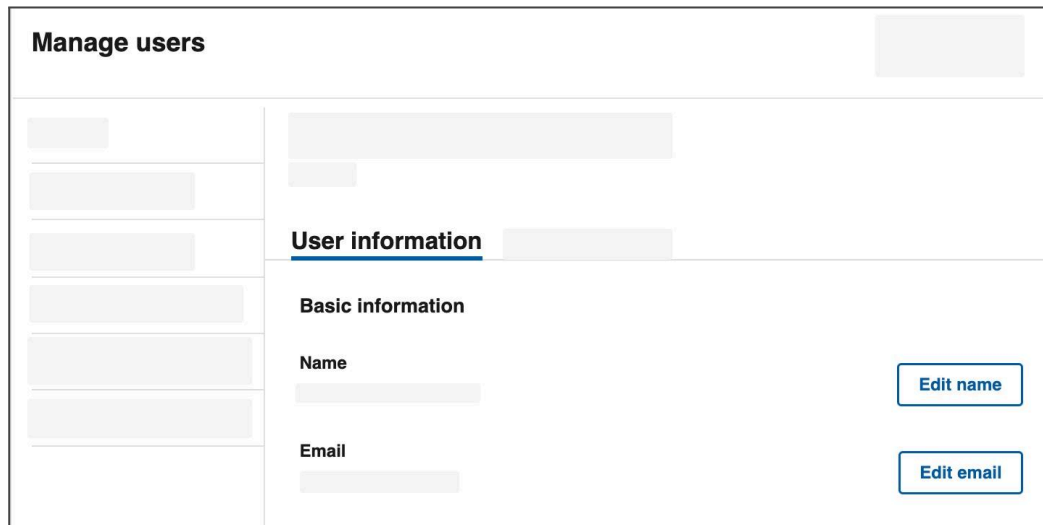
- Click the gear icon at the top right corner of the page.



2. Find and click on the “**Manage users**” tab.



3. Select **Edit name** or **Edit email** and confirm your changes.

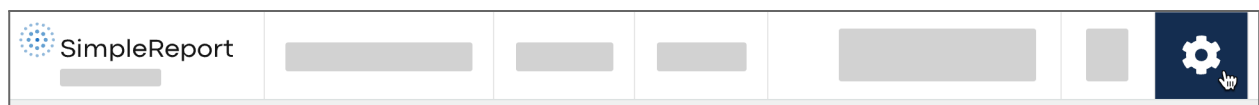


## Reactivate user

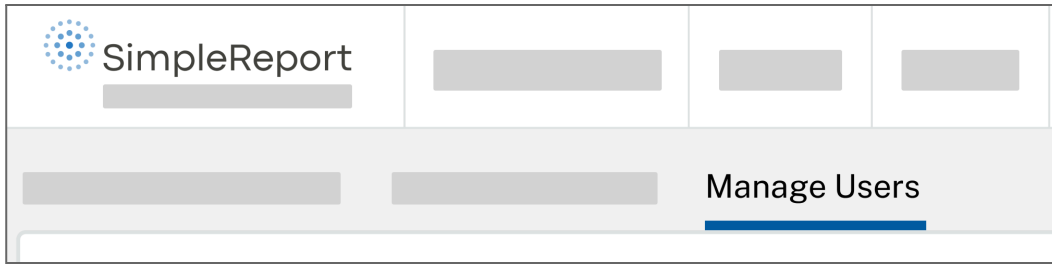
SimpleReport deactivates users after 60 days without logging in. Organization admins can reactivate users in SimpleReport. (If you're looking for help with your password, learn how to [reset it on your own.](#))

To reactivate a user:

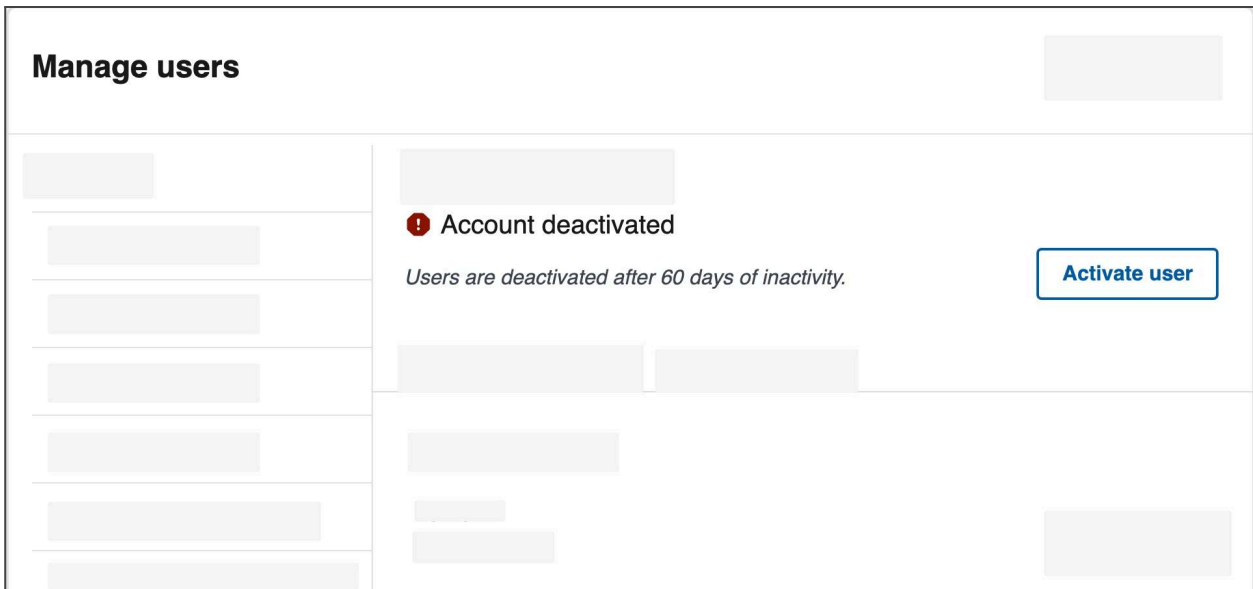
1. Click the gear icon at the top right corner of the page.



2. Find and click **Manage users**.



3. Find the user that needs to be reactivated and click the **Activate user** button on their profile and confirm.



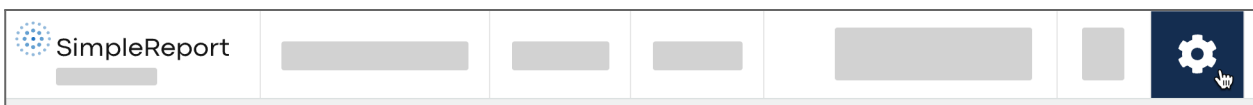
Please note: If the reactivated user doesn't log in to SimpleReport before 6AM Eastern time the following day, their account will be deactivated again.

## Reset user password

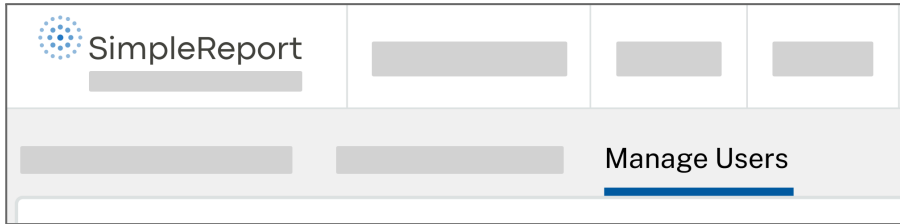
Organization admins can reset passwords for staff or employees (users) in SimpleReport. If you don't have admin privileges, talk to an admin about upgrading permissions on your account. (You can also [reset your own password](#).)

To reset a user password:

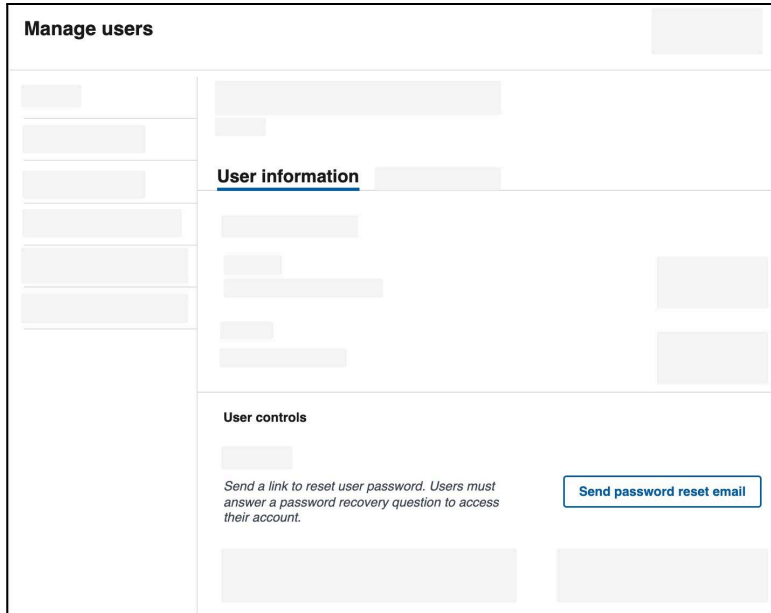
1. Click the gear icon at the top right corner of the page.



2. Find and click "Manage users".



3. Select **Send password reset email**, and confirm.

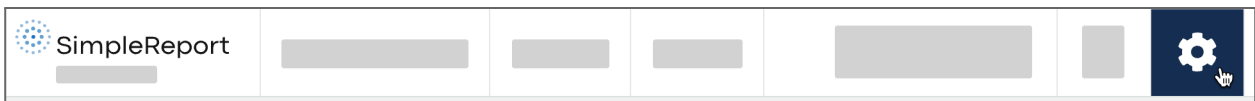


## Reset user MFA

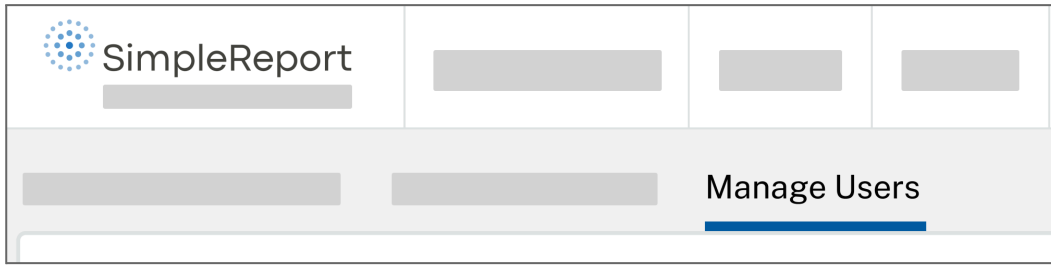
Organization admins can reset multi-factor authentication (MFA) login access settings for staff or employees (users) in SimpleReport. If you don't have admin privileges, talk to an admin about upgrading permissions on your account.

To reset a user MFA:

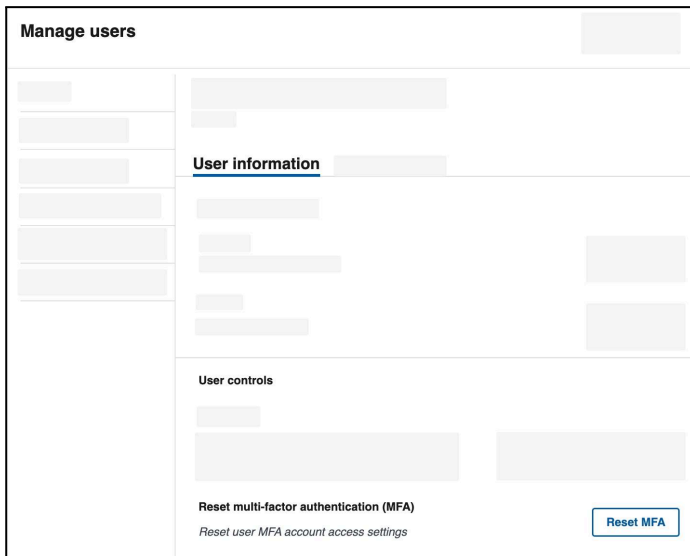
1. Click the gear icon at the top right corner of the page.



2. Find and click "Manage users".



3. Find and click on the correct user from the list, select **Reset MFA**, then confirm.



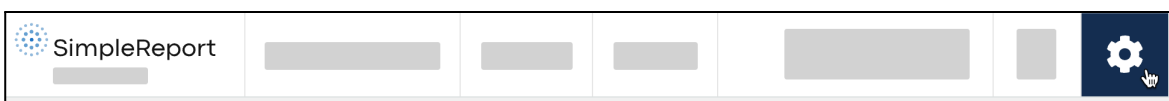
## Manage facility info

### Add a testing facility or location

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

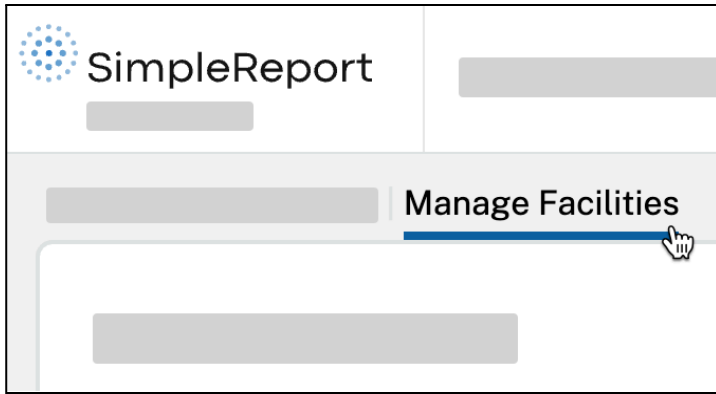
To add a testing facility:

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.)

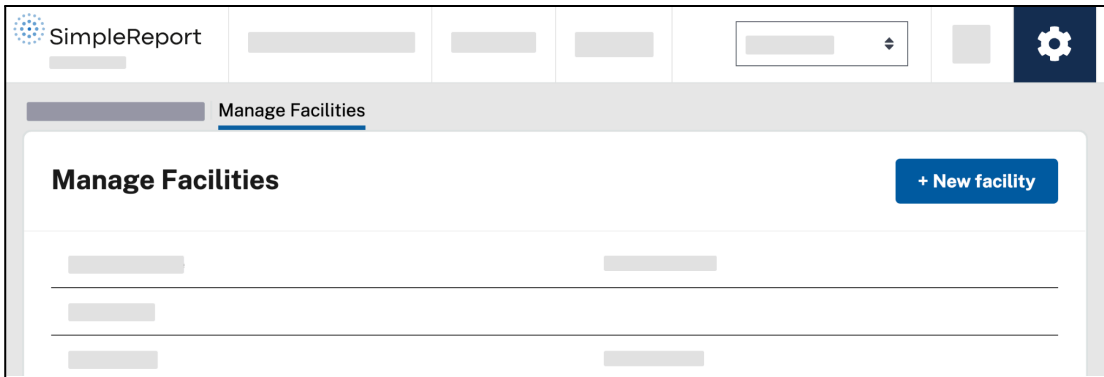


2. Beneath the SimpleReport logo at the top of the page, find the "Manage organization" and "Manage

facilities” tabs. (Your organization is the umbrella for all of your facilities.) Click **Manage facilities**.

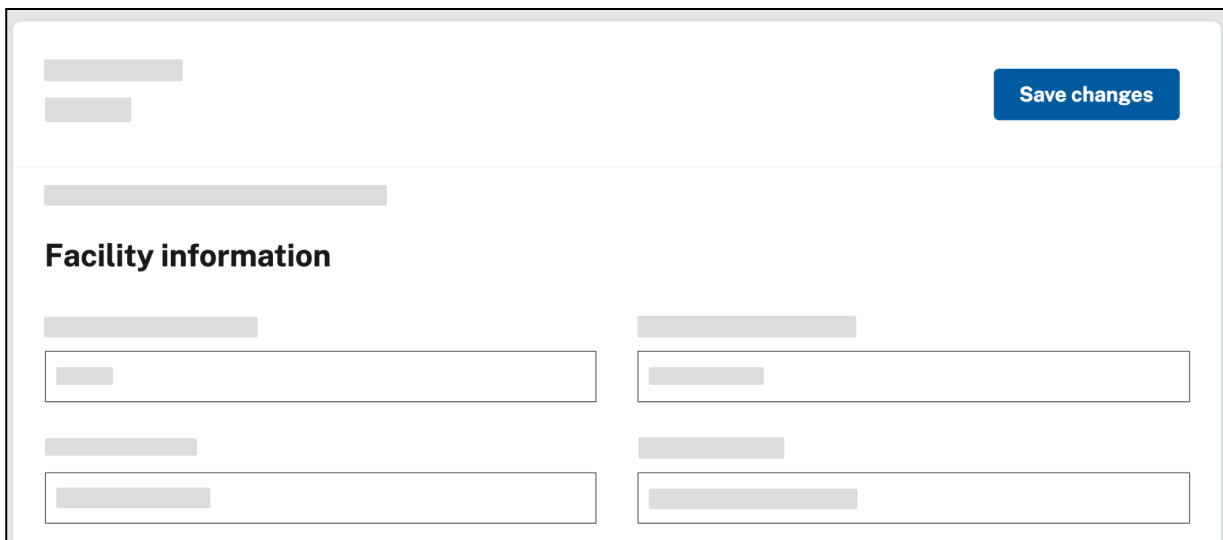


3. Click **+ New facility**.



4. Enter information for the new facility. This includes facility contact information, CLIA number, ordering provider contact information and NPI number, and test devices. (Links to look up CLIA and NPI numbers are provided on this page.)

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





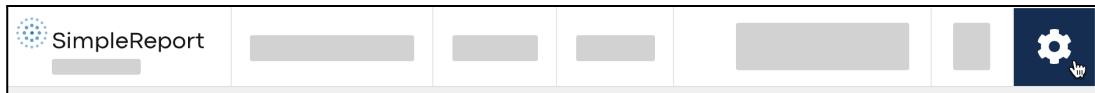
# Update testing facility settings

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

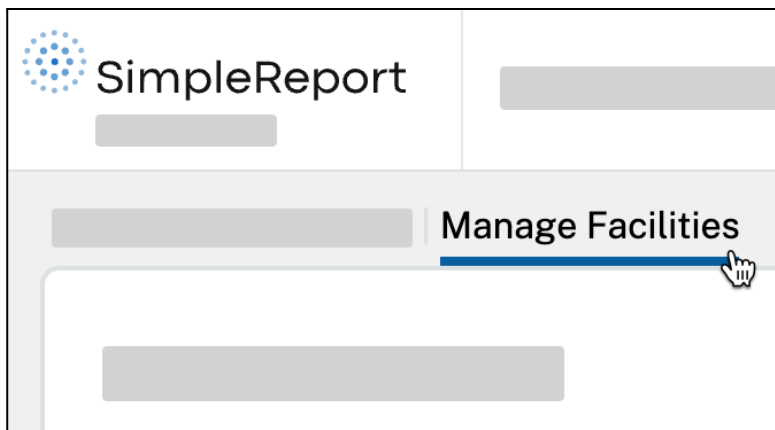
Only change testing facility names if doing so is absolutely necessary. To change the name of your facility, contact [support@simplereport.gov](mailto:support@simplereport.gov) to make sure that your results continue being reported to your public health department.

To update your testing facility information:

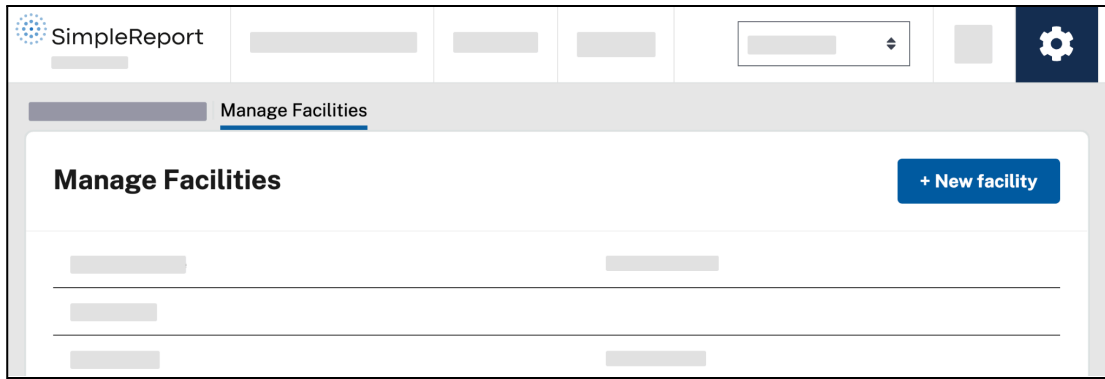
1. Click the gear icon at the top right corner of the page.



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**.

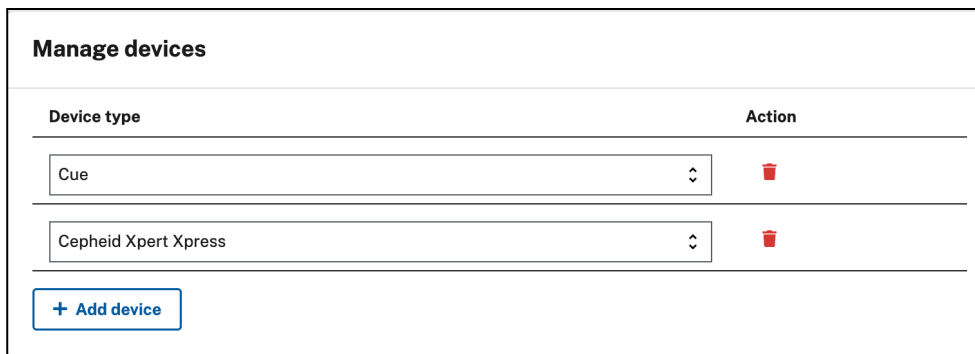


3. Click the name of the testing facility whose information you want to edit. (You can also [add a new facility](#).)



4. Edit the information that you want to change.

If the testing devices your facility uses have changed, update your device information under “Manage devices” card.



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

## Test for other diseases

### Influenza A and B

Certain devices test for COVID-19, influenza A, and influenza B (“multiplex devices”). SimpleReport requires you to include flu results when you record tests from these devices. **At this time, flu results are only sent to certain public health departments**, but you can share them with patients.

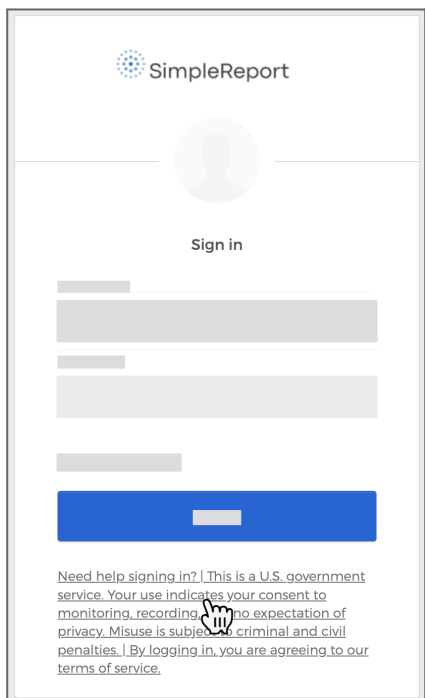
To record flu results on SimpleReport, [conduct and submit a test](#) as you normally would. You'll be able to enter results for flu A and flu B if you select a flu or multiplex (multiple conditions) device. You can also report COVID-19, flu A, and flu B results all from a single spreadsheet using the [bulk results uploader](#).

To see an up-to-date list of jurisdictions accepting flu results and the flu-only test devices available on SimpleReport, [visit the SimpleReport website](#).

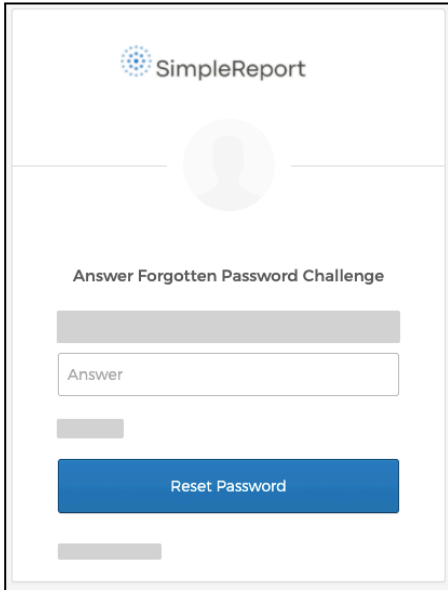
## Reset your SimpleReport password

To reset your password you can follow these steps:

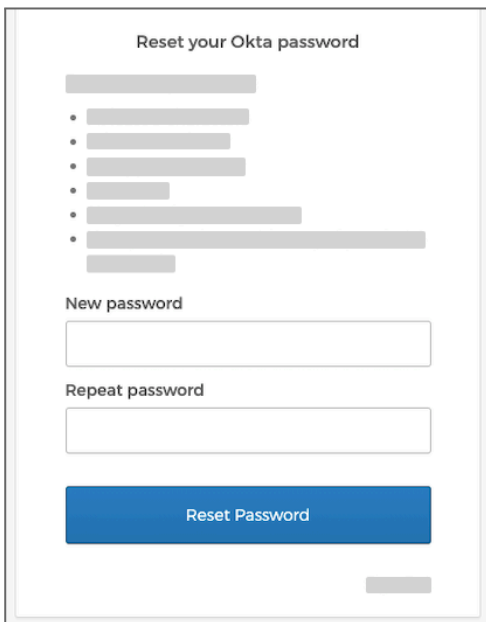
1. Go to [SimpleReport.gov](#)
2. Click **Log in** at the top right of the page.
3. Click the **Need help signing in?** text at the bottom of the page, below the sign-in button.
4. Click **Forgot password**.
5. Enter your email address, then click the blue **Reset via email** button.



6. Check your email inbox. You should receive an email allowing you to reset your password. Open the email and click the link inside.
7. Answer your security question, then click **Reset Password**.

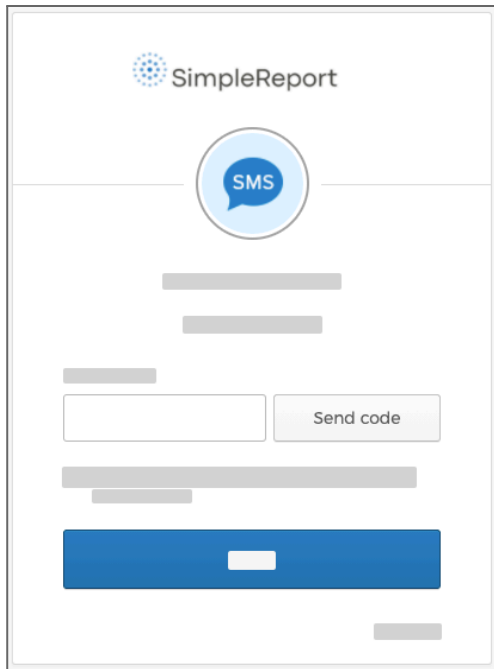


8. Enter a new password in both the "New password" and "Repeat password" fields, then click **Reset Password**.

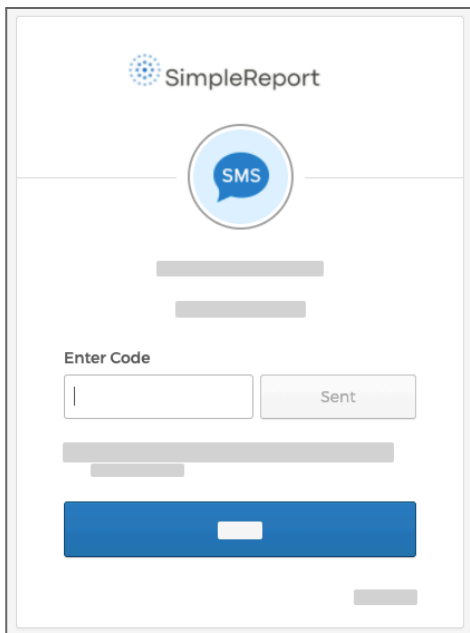


9. You'll need to use the multi-factor authentication option that you set up when you registered your account. Here's an example of what you'll need to do if you set up SMS authentication:

- 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.)

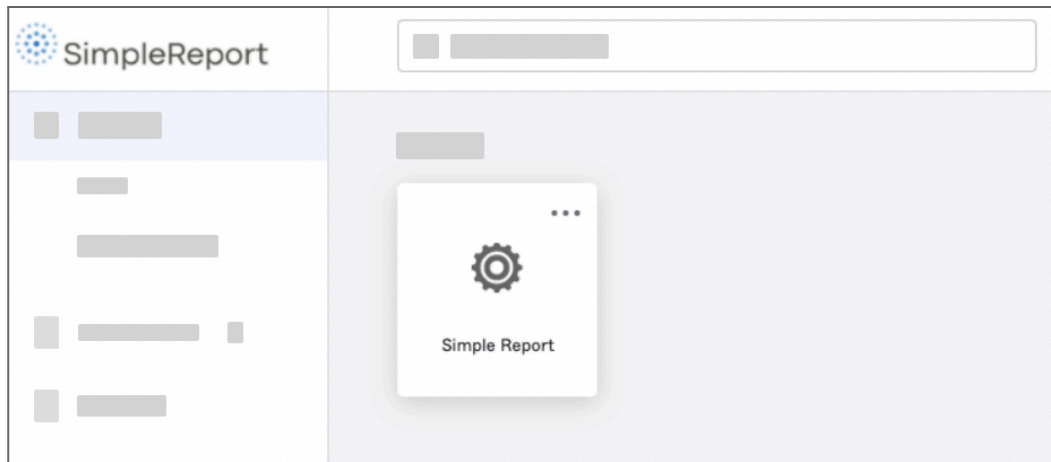


- b. Once you receive the text, enter the code in the “Enter Code” field.



- c. Click **Verify**.

10. Once you've finished verifying, the Okta page will appear. Click **Simple Report**.



11. You'll be sent back to the SimpleReport landing page. Click **Log in** at the top right corner of the page, which should automatically log you back into SimpleReport.

If you're still having trouble changing your password, SimpleReport admins can also [reset user passwords](#) for testing facility employees and staff.

## 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](mailto: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.

## What's new in this version

**Version 2.0** (12/14/2023) of the SimpleReport user guide includes:

- Disclaimer about potentially outdated information in the user guide
- Updated selection method for [Select your testing facility](#)
- [Influenza A and B information](#) points to SimpleReport website for details