



# CDC Specimen Test Order and Reporting (CSTOR) User Guide: Enrollment for Users

CDC OID ELIMS – Doc. No. ELIMS.DR.L.339 – Effective October 2023 – Revision No. 3





## Contents

SAMS/CSTOR Onboarding Frequently Asked Questions .....	3
What is SAMS? .....	3
What is the Difference between the CSTOR Lab User and CSTOR Lab Admin user role? .....	3
How many CSTOR Lab Admins should my organization have?.....	3
Getting Access for New Users to the CSTOR Web Portal .....	3
Overview .....	3
Step 1) Request to Add New User via CSTOR’s Manage Organization Module.....	4
Step 2: Create SAMS Profile (SAMS Registration).....	5
Invitations Expire! – Your invitation is only good for 30 days. ....	6
SAMS Password Rules .....	7
Step 3A: Complete and Submit Identity Verification Documents to CDC.....	7
Step 3B: Manual Identity Proofing via Notarization .....	11
Preparation .....	11
Access to Notary Services .....	11
Step 4: Access CSTOR Using SAMS Credentials and Complete Training.....	11
Upgrading your SAMS Account from Level I to Level II .....	12
Need Additional Help? .....	12





## SAMS/CSTOR Onboarding Frequently Asked Questions

### What is SAMS?

The CDC Secure Access Management Services (SAMS) is a federal information technology (IT) system that gives authorized personnel secure access to non-public CDC applications. The SAMS partner portal is a website designed to provide centralized access to public health information and computer applications operated by the CDC.

### What is the Difference between the CSTOR Lab User and CSTOR Lab Admin user role?

Lab Users can create test orders, submit specimens, ship packages, check the status and view reports. The CSTOR Lab Admin has access to all the capabilities of Lab Users as well as editing the organization information and adding users to an organization.

### How many CSTOR Lab Admins should my organization have?

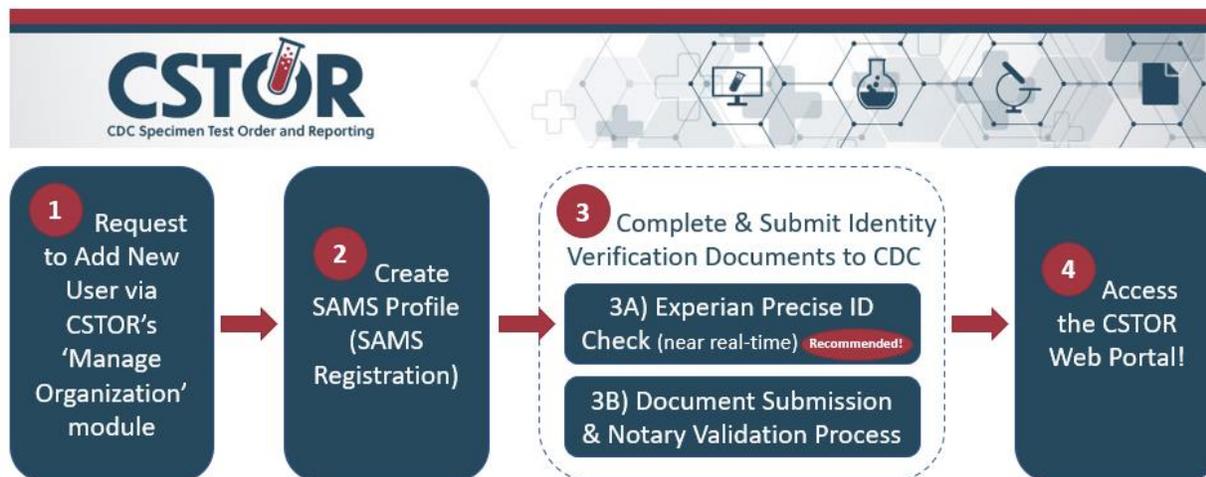
Minimum of 2 Lab Admins required at all times.

## Getting Access for New Users to the CSTOR Web Portal

### Overview

The CDC Specimen Test Order and Reporting Web Portal is a central online gateway for CDC Infectious Disease (ID) Laboratory Partners to submit specimens and access test results and reports.

There are four steps involved in gaining access to CSTOR. Below is an overview of this process.

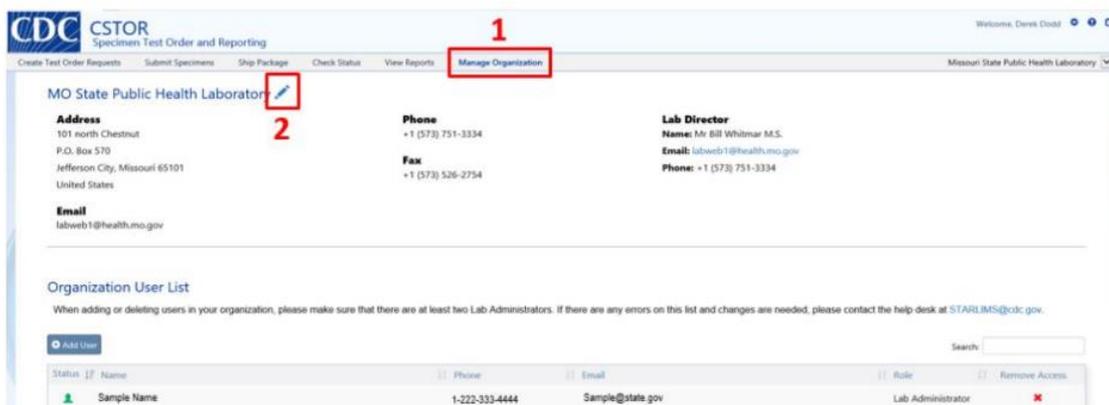




## Step 1) Request to Add New User via CSTOR's Manage Organization Module

Onboarding is initiated for new CSTOR users (both Lab Administrators and Lab Users) by first having an enrolled CSTOR Lab Administrator within your organization request to add the user in the 'Manage Organization' module in CSTOR using the 'Add User' button.

1. Log in to [CSTOR Web Portal](#) as a Laboratory Administrator and select the 'Manage Organization' module.
2. Select the edit (i.e., pencil) icon located near your organization's name.
3. Edit the appropriate fields as necessary.
4. Select Submit.
5. Once the organization update confirmation window displays, select Close. **NOTE:** Required fields display a red asterisk. Lab Administrators are not able to edit the organization's email address. To edit the organization's email address, contact the IDSS Helpdesk.



**CSTOR** Specimen Test Order and Reporting

Manage Organization

MO State Public Health Laboratory

**Address**  
101 north Chestnut  
P.O. Box 570  
Jefferson City, Missouri 65101  
United States

**Phone**  
+1 (573) 751-3334

**Fax**  
+1 (573) 526-2754

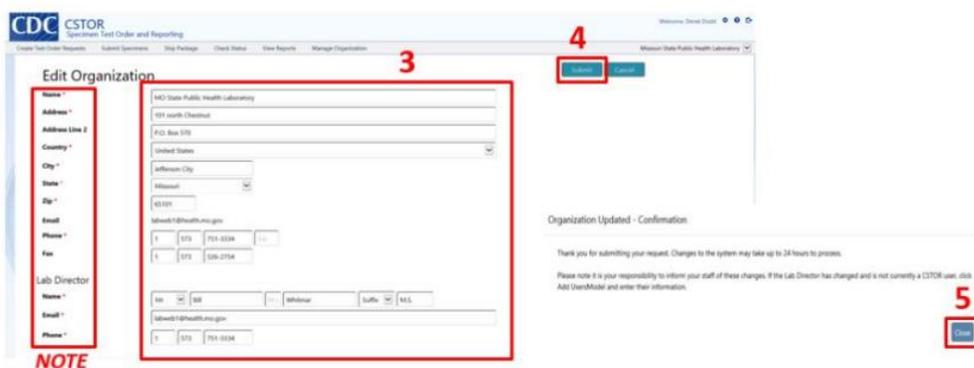
**Lab Director**  
Name: Mr Bill Whitmar M.S.  
Email: labweb1@health.mo.gov  
Phone: +1 (573) 751-3334

**Email**  
labweb1@health.mo.gov

**Organization User List**  
When adding or deleting users in your organization, please make sure that there are at least two Lab Administrators. If there are any errors on this list and changes are needed, please contact the help desk at STARLIMS@cdc.gov.

**Add User**

Status	Name	Phone	Email	Role	Remove Access
Active	Sample Name	1-222-333-4444	Sample@state.gov	Lab Administrator	X



**CSTOR** Specimen Test Order and Reporting

Edit Organization

**Name \*** MO State Public Health Laboratory

**Address \*** 101 North Chestnut

**Address Line 2 \*** P.O. Box 570

**Country \*** United States

**City \*** Jefferson City

**State \*** Missouri

**Zip \*** 65101

**Email \*** labweb1@health.mo.gov

**Phone \*** +1 (573) 751-3334

**Fax \*** +1 (573) 526-2754

**Lab Director**

**Name \*** Mr Bill Whitmar M.S.

**Email \*** labweb1@health.mo.gov

**Phone \*** +1 (573) 751-3334

**Organization Updated - Confirmation**

Thank you for submitting your request. Changes to the system may take up to 24 hours to process.

Please note it is your responsibility to inform your staff of these changes. If the Lab Director has changed and is not currently a CSTOR user, click Add User/Modify and enter their information.

**Close**

**NOTE**

**NOTE:** If you are representing a new organization and do not have any members currently onboarded to CSTOR, please contact the [CSTOR Team](#) with the subject line: "Organization Request for CSTOR Access."

**NOTE:** Required fields display a red asterisk. Lab Administrators are not able to edit the organization's email address. To edit the organization's email address, contact the IDSS Helpdesk at: [cdc\\_id\\_lab\\_info@cdc.gov](mailto:cdc_id_lab_info@cdc.gov).



## Step 2: Create SAMS Profile (SAMS Registration)

*Receive and respond to an email from SAMS inviting you to register and create a SAMS user profile.*

- Within 1-2 working days after your organization's CSTOR Lab Administrator requested your access to CSTOR, SAMS will send you an email inviting you to register online with SAMS.
- The invitation (shown below) will be from SAMS: [SAMS No-Reply \(CDC\)](#). This is a valid and official email from CDC. Check to make sure the email was not trapped by your anti-SPAM filter.
- When you're ready to register, click on the registration link (or cut and paste into your browser window) to begin. You will be prompted to log in first, so be sure to have your User ID and Temporary Password handy before you start. (All of these things can be found in your SAMS Partner Portal invitation email).
- Here's a list of a few more things you'll need to complete the online registration:
  - Your home address
  - Your organization name and address
  - Your phone number
  - About 10 minutes

### What is involved in the registration process?

Registration consists of 3 to 4 steps:

1. Follow the registration link from your invitation and log in to SAMS.
2. Read and accept the SAMS Partner Portal Rules of Behavior.
3. Register by:
  - a. Validating your legal name and providing your organization, and contact information.
  - b. Setting your password.
  - c. Choosing your account security questions.
4. If necessary, provide proof of your identity.

**NOTE:** Keep It Legal - Your legal name should be used to register, and during registration is the only time you can modify your name. So, if a Program invited you to SAMS as 'Bob' or 'Beth', but your real name is 'Robert' or 'Elizabeth', now is your one chance to correct that. It's essential your legal name be represented in case you must complete the Identity Verification process.





Below is a screenshot of the SAMS Invitation email and guidance on how to complete your SAMS profile.

Hello Awardee,

You have been invited to register with the SAMS Public Health Partner Portal. This invitation was requested for you based on your specific role in public health and will enable you to access the following CDC computer application(s):

- **NCIRD\_VTtracks External SharePoint Site Collection: VTtracks External SharePoint Site Collection Owner**

A registration account has already been created for you. A link to this account and a temporary password are provided below. This invitation is valid for 30 days.

**SAMS Partner Portal Registration**

Registration consists of the following steps:

1. Online Registration
2. Identity Verification (if required for your application)
3. Access Approval

Online registration with the SAMS portal takes about 5 minutes. Please have the following available before you begin:

- Your home address - This must match the documentation you intend to use for proofing if applicable.
- Your organization / employer and their address
- Your telephone number

Should you have questions about the SAMS Partner Portal or the registration process, please contact our Help Desk for assistance or refer to the [SAMS User FAQ](#).

Thank you,  
The SAMS Team

---

To register with the SAMS Partner Portal, please click the following link or cut and paste it into your browser:

[https://im-int.cdc.gov/iam/im/SAMS3/ui/index.jsp?task\\_tag=SAMSRegistration](https://im-int.cdc.gov/iam/im/SAMS3/ui/index.jsp?task_tag=SAMSRegistration)

When prompted, please enter:

- Your Email/User Name: [abc1@cdc.gov](mailto:abc1@cdc.gov)
- Temporary Password: \*\*\*\*\*

and click the Login button.

**\*\*\*Note:** In order to access the SAMS Partner Portal, your browser must be configured to use TLS 1.0 encryption. If your computer is not configured for TLS, or if you are unsure, please contact your local IT System Administrator for assistance.

---

For more information and assistance, please see the SAMS FAQ located [here](#), or contact the SAMS Help Desk between the hours of 8:00 AM and 6:00 PM EST Monday through Friday (excluding U.S. Federal holidays) at the following:

Toll Free: (877) 681-2901  
Email: [samshelp@cdc.gov](mailto:samshelp@cdc.gov)

**\*\*\*Note:** This email has been sent from an unmonitored mailbox. **DO NOT REPLY TO THIS EMAIL.** Please direct all inquiries to the Help Desk as listed above.

**Instructions once you receive this email:**

- Select the link
- Enter your username/email
- Enter the provided temporary password

Then, you will create a user profile, answer five security questions, and create a SAMS password. (Requirements for the SAMS password are covered below).

The entire registration process must be completed in one session, as there is no

**NOTE:** If you do not receive your invitation email within 7 days, please contact the [SAMS Help Desk](#) for assistance.

Invitations Expire! – Your invitation is only good for 30 days.

1. Login to the SAMS application using your assigned username (i.e., your current email address) and temporary password from the invite email
2. Accept the SAMS Rules of Behavior
3. Complete the SAMS Registration Form



## SAMS Password Rules

You will create your SAMS password in the SAMS Registration process outlined above. SAMS passwords must comply with the following standards:

- Must contain a combination of three of the following: numbers, upper and lower case letters, or special characters
- Must contain at least 8 characters

Passwords must be changed every 60 days. Rules on changing passwords:

- If the password expires, you will be prompted to change it upon the next login
- To update the password, access the SAMS portal and select Change Password
- You are not allowed to use any of the last ten passwords

## Step 3A: Complete and Submit Identity Verification Documents to CDC

Identity proofing is the process of validating your identity against your credit information or government-issued IDs. This section outlines the recommended approach for identity proofing, called *Experian Precise ID Check*. This version of identity proofing is completed in near real-time.

### **Important facts to know about the Experian Precise ID Check:**

- It is a soft credit check and does not impact your credit in any way.
- It can still be used by people whose credit is currently frozen.

If you are unable to complete the *Experian Precise ID Check* after *three* attempts, then you must complete identity proofing via the *document submission/validation process*. (See note below)

While most people will be able to successfully complete the Experian Precise ID Check, there are several reasons you may be unable to complete this process including but not limited to: not having any credit history, Experian being unable to verify your identity or exceeding the allotted time. Because the Experian Precise ID Check is a third-party software, the Vaccine Order Management Contact Center or the SAMS Help Desk will not have visibility into your personal identifying questionnaire, and thus not be able to verify why you were unable to complete the Experian Precise ID Check.

Note: If you would like more information about the *document submission/validation process*, see '*How to Complete the Document Submission/Validation Process*' document: **xxxxxx**. *Document submission/validation* can take up to one month to complete.





## Experian Precise ID Check

**Step I:** Select the link provided in the 'Identity Verification Request' email, seen below.

**From:** [QA-SAMS@cdc.gov](mailto:QA-SAMS@cdc.gov)  
**Date:** June 2, 2021 at 9:54:53 PM EDT  
**To:** [Redacted]  
**Subject:** CDC: SAMS Partner Portal - Identity Verification Request Form

Hello [Redacted],

Thank you for registering with CDC's SAMS. Your registration information has been received. Your next step is to verify your identity through a process called "Identity Proofing".

SAMS now supports two options for identity validation. Please review each option below and select what works best for you.

**OPTION 1 - Experian Precise ID Check (preferred method)**

Using a secure interface, you will provide Experian your social security number (SSN) and Date-Of-Birth (DOB). This information is sent directly to Experian and NOT stored by SAMS or CDC. Experian will validate this information and may ask you a series of questions derived from details contained in your credit report. This option will not impact your credit score or credit worthiness. This process takes less than a minute and is the fastest way to complete the SAMS identity proofing process. If you fail the Experian check, you can still complete the identity verification process using Option 2.

To initiate the Experian Precise ID check, click the link below and log into SAMS via 'SAMS Credentials' option using SAMS username and recently established password

<https://sams-stg.cdc.gov/samsidproofing/idusers/edit/4743>

*If selecting Option 1, stop reading. You can disregard all additional instructions.*

**Step II:** You will see a SAMS Login Page. Enter your username and password that you created in the SAMS registration process (step 2), in the left column. Select 'Login.'

Choose a login option

External Partners	HHS Staff
<div style="border: 2px solid red; padding: 5px;"> <p style="text-align: center;"><b>SAMS Credentials</b></p> <p>SAMS Username <input type="text"/></p> <p>SAMS Password <input type="password"/></p> <p style="text-align: center;"><b>Login</b></p> <p style="text-align: center; font-size: small;">Forgot Your Password?</p> <p style="font-size: x-small;">For External Partners who login with only a SAMS issued UserID and Password.</p> </div>	<p style="text-align: center;"><b>SAMS Multi-factor Login</b></p> <p style="text-align: center;">OR</p> <p style="text-align: center; font-size: small;">Sign on with a SAMS Grid Card or Mobile Soft Token</p> <p style="text-align: center;"><b>Login</b></p> <p style="font-size: x-small;">For External Partners who have been issued a SAMS Multi-factor token(s).</p>
<p style="text-align: center;"><b>AMS Login</b></p> <p style="text-align: center; font-size: small;">How to use AMS</p> <p style="text-align: center;"><b>Login</b></p> <p style="font-size: x-small;">For all HHS staff including Operating Divisions (CDC, NIH, FDA, etc.)</p>	<p style="text-align: center;"><b>AMS One Time Password</b></p> <p style="text-align: center; font-size: small;">OR</p> <p style="text-align: center; font-size: small;">How to use OTP</p> <p style="text-align: center;"><b>Login</b></p> <p style="font-size: x-small;">For all HHS staff including Operating Divisions (CDC, NIH, FDA, etc.) with a One Time Password.</p>



**Step III:** After logging in, you will see the screen below, which contains some personal information provided during the registration process. In the second section, enter your SSN and DOB. Select both 'I agree' boxes, then select 'Submit.'

 Centers for Disease Control and Prevention  
CDC 24/7: Saving Lives, Protecting People™

Search

 **SAMS**  
secure access management services

Welcome XXXXXXXXXX

### SAMS Self ID Proofing

You provided the following information as part of your SAMS registration. Please verify this information. If you need to make any changes, please contact [samshelp@cdc.gov](mailto:samshelp@cdc.gov).

<b>First Name</b>	XXXXXXXXXX	<b>Last Name</b>	XXXXXXXXXX
<b>Phone Number</b>	XXXXXXXXXX	<b>Email Address</b>	XXXXXXXXXX@XXXXXX.XXX
<b>Address</b>	XXXXXXXXXX Street, XXXX, XXXX XXXX		

Please provide the following additional information. This information will only be used by Experian to complete your identity proofing during this session. SAMS does not store this information.

**Social Security Number (SSN):**

**Date of Birth (DOB):**

If you cannot provide the above information, are uncomfortable providing this information, or if the system is not accepting the values you enter, a manual identity proofing process is available. Please click [here](#) to receive an email with the manual identity proofing instructions.

You understand that by selecting the 'I AGREE' checkbox immediately following this notice, you are providing 'written instructions' to CDC under the Fair Credit Reporting Act authorizing CDC to obtain information from your personal credit profile or other information from Experian. You authorize CDC to obtain such information solely to confirm your identity to avoid fraudulent transactions in your name.

I Agree.

You authorize your wireless operator to disclose to us details of your account, subscriber, billing and device, if available, to support verification of identity, fraud avoidance in support of and for the duration of your business relationship with us. Where applicable, this information may also be shared by us with other companies to support your transactions and for fraud avoidance purposes. You can see a more detailed list of information potentially disclosed and how we use your data in our Privacy Policy.

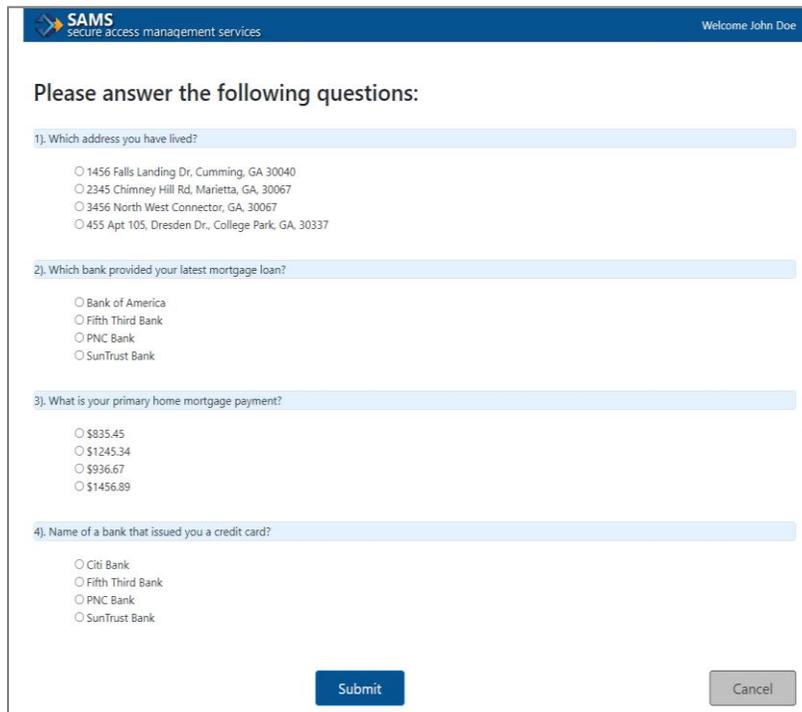
I Agree.



**Step IV:** Next, you will be asked a series of multiple-choice identifying questions. Please select the correct answers based on your personal identifying information, then select 'Submit.'

**Please Note:** Answer the questions as quickly as you can, as there is a five-minute time limit before the session times out. If you time out, you will have to log into the system again and start over.

If ~~within your three attempts, you fail to answer these questions correctly~~ Experian is unable to verify your identity or your session times-out, you ~~will be instructed to~~ must complete the Document Submission/Validation process for identity proofing. [To find more information on how to complete the Document Submission/Validation process see the following link: xxxxx.](#) ~~Please reach out to the~~



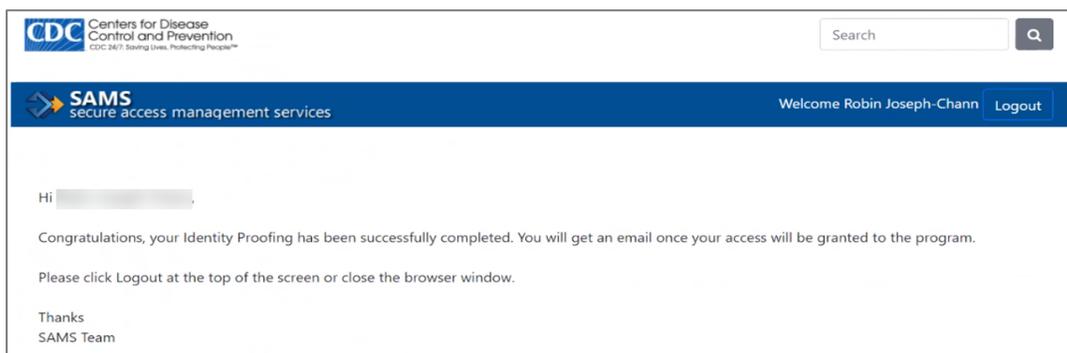
The screenshot shows a web interface for SAMS (secure access management services). At the top, it says 'Welcome John Doe'. The main heading is 'Please answer the following questions:'. There are four questions, each with a text input field and a list of radio button options:

- 1). Which address you have lived?
  - 1456 Falls Landing Dr, Cumming, GA 30040
  - 2345 Chimney Hill Rd, Marietta, GA, 30067
  - 3456 North West Connector, GA, 30067
  - 455 Apt 105, Dresden Dr., College Park, GA, 30337
- 2). Which bank provided your latest mortgage loan?
  - Bank of America
  - Fifth Third Bank
  - PNC Bank
  - SunTrust Bank
- 3). What is your primary home mortgage payment?
  - \$835.45
  - \$1245.34
  - \$936.67
  - \$1456.89
- 4). Name of a bank that issued you a credit card?
  - Citi Bank
  - Fifth Third Bank
  - PNC Bank
  - SunTrust Bank

At the bottom of the form are two buttons: 'Submit' and 'Cancel'.

**Step V:** Congratulations! You have successfully completed the Experian identity verification.

**Note:** If you did not successfully complete Identity Proofing, you may restart the Experian Precise ID Check two additional times by clicking the link in your Identity Verification Request email (Step 1 above).



The screenshot shows a success message page. At the top left is the CDC logo and 'Centers for Disease Control and Prevention'. At the top right is a search bar. Below that is the SAMS header with 'Welcome Robin Joseph-Chann' and a 'Logout' button. The main content area says:

Hi [redacted],

Congratulations, your Identity Proofing has been successfully completed. You will get an email once your access will be granted to the program.

Please click Logout at the top of the screen or close the browser window.

Thanks  
SAMS Team





## Step 3B: Manual Identity Proofing via Notarization

### Preparation

Make a photocopy of a valid ID (one): Driver's License, U.S. Passport, Work ID with photo, U.S. Military ID, or Passport Card.

### Access to Notary Services

Notary services can usually be found at your local bank or credit union and they normally perform the services for free if you are a member.

**NOTE:** You must bring the SAMS User Identity Verification Request Form, the actual ID, and the photocopy to the Notary.

Once you complete the SAMS Registration Form, you will receive a SAMS registration confirmation email:

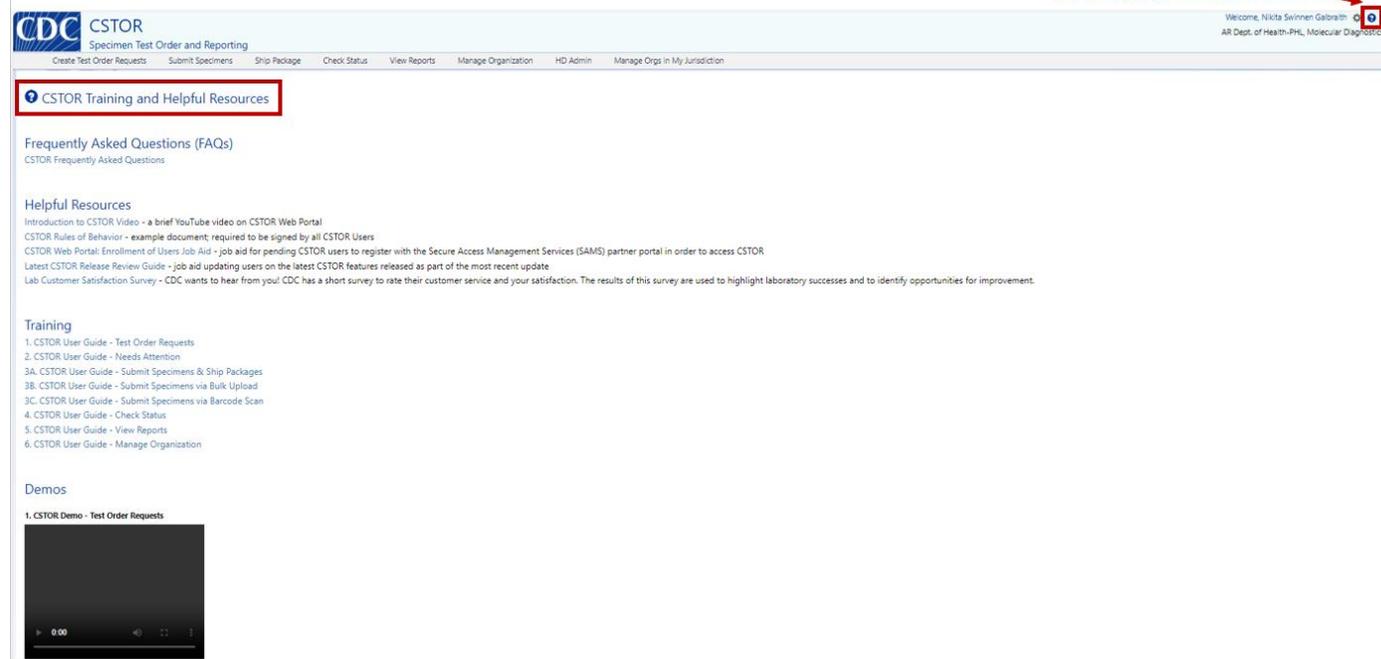
1. Print the attached verification form from the confirmation email
2. Take the Identity Verification Form, photo ID, and copy of photo ID to a notary public for endorsement
3. Mail or fax the endorsement verification forms and supporting documents back to CDC

## Step 4: Access CSTOR Using SAMS Credentials and Complete Training

Now that your registration with the SAMS Partner Portal is finished, the CSTOR program administrator will be notified to review and approve your access. They will send you a "CDC CSTOR Web Portal: Accessed Approved" email.

1. Login to <https://sams.cdc.gov/> and click the CSTOR link OR follow this link to the [CSTOR Web Portal](#)
2. Accept the CSTOR Rules of Behavior
3. Review CSTOR training content

Training Located Here





Training Content includes the following trainings as written user guides with screenshot explanations. Video training guides are also available.

- 1) CSTOR User Guide – Test Order Requests
- 2) CSTOR User Guide – Needs Attention
- 3) CSTOR User Guide
  - a) Submit Specimens & Ship Packages
  - b) Submit Specimens Via Bulk Upload
  - c) Submit Specimens via Barcode Scan
- 4) CSTOR User Guide – Check Status
- 5) CSTOR User Guide – View Reports
- 6) CSTOR User Guide – Manage Organization

## Upgrading your SAMS Account from Level I to Level II

Securing SAMS Level 2 access is a requirement to access the CSTOR portal. SAMS Level I access involves registration (Step 2) but does not require the identity proofing (Step 3). If you already have SAMS Level I access and have been requested to be added to CSTOR (via Step 1), you will skip the registration and instead start the process at the identity proofing (Step 3).

Once a laboratory administrator from your organization has requested to add you (Step 1), you should receive an 'identity proofing request' email from SAMS ([SAMS No-Reply \(CDC\)](#)) which outlines the tasks required to complete proofing (as also indicated in the user guide's Step 3A or 3B above) and provides the link to complete the identity proofing.

**NOTE:** If you do not receive your identity proofing email within 7 days, please contact the [SAMS Help Desk](#) for assistance.

Please note that you have a 60-day window to complete the necessary identity proofing steps to complete the process in order to achieve SAMS Level II access. If this is not completed within the time frame, the process will have to start over again and your organization's CSTOR Lab Admin should delete your existing request and re-invite you from within the Manage Organization module in CSTOR.

## Need Additional Help?

Please refer to:

- [SAMS Enrollment Guide](#)
- [SAMS Help Desk](#)
  - Open between the hours of 8:00 AM and 6:00 PM EST Monday through Friday (excluding U.S. Federal holidays)
  - Toll Free: (877) 681-2901
- [CSTOR Team](#)