

CDC SPECIMEN TEST ORDER & REPORTING (CSTOR)

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

CDC IOD ELIMS – Doc. No. ELIMS.DR339 – Effective March 2026

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Introduction

The CDC Specimen Test Order and Reporting Web Portal are the central online gateway for CDC Infectious Disease (ID) Laboratory partners—such as state public health laboratories (SPHLs), original submitters (OS), and international submitters (IS) to submit specimens and access test results and reports. This guide describes the process to gain access to CSTOR through CDC Secure Access Management Services (SAMS), establish user roles, and other key information.

SAMS/CSTOR Onboarding Frequently Asked Questions

What is SAMS?

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?

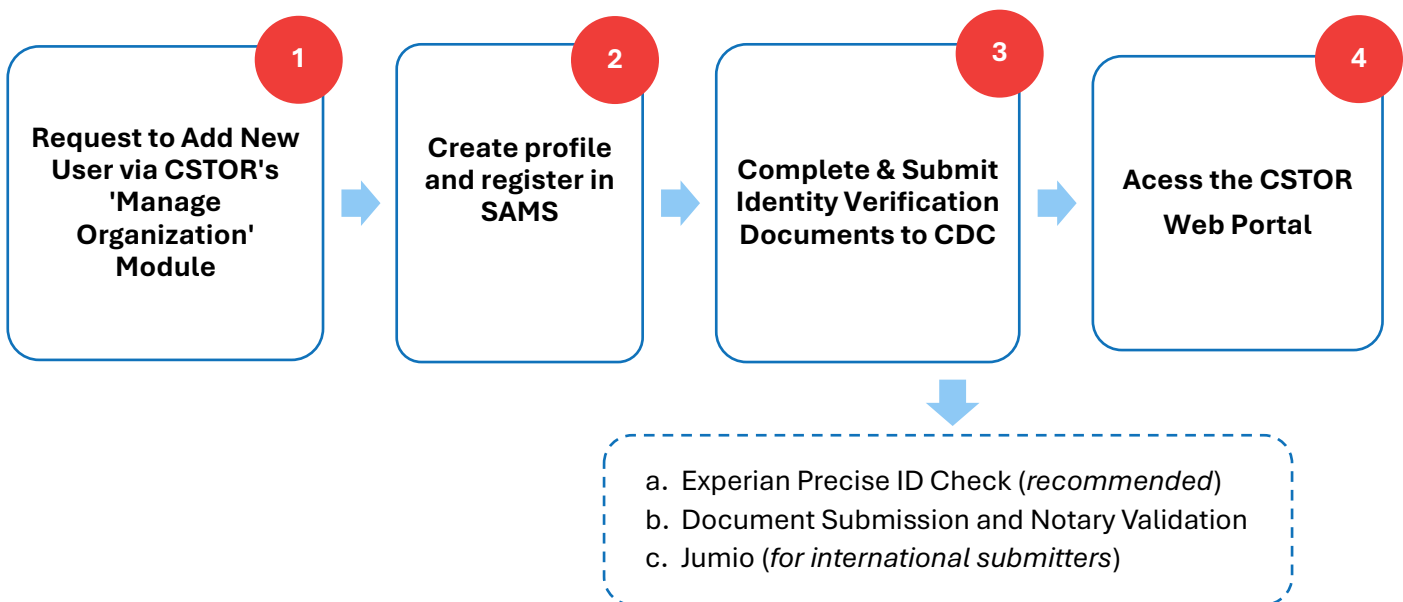
A minimum of two Lab Admins is always required.

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Getting Access to CSTOR

Overview

There are four steps involved in gaining access to CSTOR:



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

To onboard new CSTOR users (both Lab Administrators and Lab Users), an organization must have a previously enrolled CSTOR Lab Administrator. Below are the steps to add a new user:

1. Log in to CSTOR Web Portal as a Laboratory Administrator and select the 'Manage Organization' module.
2. Click on 'Add User' below the 'Organization User List'.
3. Complete the 'New Access Request' form.
4. Select Submit.

To update organization information such as the Lab Director name, organization address, and phone number:

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 to the right of your organization's name.
3. Edit the appropriate fields as necessary.
4. Select Submit.
5. Once the organization update confirmation window displays, select Close.

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The top screenshot shows the 'Manage Organization' page for 'MO State Public Health Laboratory'. Red callouts are placed as follows: 1 points to the 'Manage Organization' link in the top navigation bar; 2 points to the pencil icon next to the organization name; 3 points to the 'Edit Organization' link in the left sidebar. The page displays contact information for the laboratory, including address, phone, fax, and email, as well as the Lab Director's details.

The bottom screenshot shows the 'Edit Organization' form. Red callouts are placed as follows: 3 points to the form fields; 4 points to the 'Save' button; 5 points to the 'Organization Updated - Confirmation' message. The form includes fields for Name, Address, City, State, Zip, Email, Phone, Fax, and Lab Director information. A 'NOTE' is displayed at the bottom left of the form.

NOTE:

- Required fields display a red asterisk. Lab Administrators cannot edit the organization's email address. To edit the organization's email address, contact the [Infectious Diseases Specimen Submission \(IDSS\) Helpdesk](#).
- If you are representing a new organization and do not have any members currently onboarded to CSTOR, please contact the [CSTOR Team](#).

Step 2: Create SAMS Profile (SAMS Registration) and Password

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

- SAMS will send you an email inviting you to register online one to two working days after your organization's CSTOR Lab Administrator requested your access to CSTOR.
- The invitation (shown below) will come from SAMS: [SAMS No-Reply \(CDC\)](#). This is a valid and official email from CDC. If you do not see your invitation, we recommend checking your spam folder.

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- 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. (These items can be found in your SAMS Partner Portal invitation email).
- Completing online registration should take about 10 minutes. You'll also need:
 - Your home address
 - Your organization name and address
 - Your phone number

What is involved in the registration process?

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**, providing your organization information, and contact information.
 - b. Setting your password.
 - c. Choosing your account security questions.
4. If necessary, provide proof of your identity.

NOTE: Your legal name should be used to register, and registration is the only time you can modify your name. For example, if your SAMS invite indicates 'Bob' or 'Beth,' but your real name is 'Robert' or 'Elizabeth,' this step is the final opportunity to correct that. **It's essential to use your legal name in case you must complete the Identity Verification process.**

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 eight characters

Passwords must be changed every 60 days:

- If your password expires, you will be prompted to change it upon the next login.
- To update your password, access the SAMS portal and select 'Change Password'. Please note that you are not able to re-use your last ten passwords.

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

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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_VTrcks External SharePoint Site Collection: VTrcks 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>

When prompted, please enter:

- Your Email/User Name: 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

*****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.

1. Select the link
2. Enter your username/email and temporary password
3. Create a user profile, answer five security questions, and create a SAMS password.

The entire registration process must be completed in one session.

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

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

Identity proofing validates your identity against your credit information or government-issued IDs. For domestic users, the Experian Precise ID Check is the preferred identity proofing method. For international users, [Jumio](#) is the preferred identity proofing method.

Experian Precise ID Check

Action 1: Select the link provided in the 'Identity Verification Request' email, seen below.

Important facts 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)

NOTE: 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 and/or 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.

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From: 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.

Action 2: You will see a SAMS Login Page. Enter your username and password that you created in the [SAMS registration process](#) in the left column. Select 'Login.'

Choose a login option

External Partners	HHS Staff		
SAMS Credentials  SAMS Username SAMS Password Login Forgot Your Password? For External Partners who login with only a SAMS issued UserID and Password.	SAMS Multi-factor Login  Sign on with a SAMS Grid Card or Mobile Soft Token Login For External Partners who have been issued a SAMS Multi-factor token(s).	AMS Login  How to use AMS Login For all HHS staff including Operating Divisions (CDC, NIH, FDA, etc.)	AMS One Time Password  How to use OTP Login For all HHS staff including Operating Divisions (CDC, NIH, FDA, etc.) with a One Time Password.

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Action 3: After logging in, you will see the screen below, which contains personal information provided during the registration process. In the second section, enter your Social Security Number (SSN) and Date of Birth (DOB). Select both 'I agree' boxes, then select 'Submit.'

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SAMS secure access management services Welcome Logout

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.

First Name [redacted] **Last Name** [redacted]
Phone Number [redacted] **Email Address** [redacted]
Address [redacted]

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): [redacted] [eye icon]
Date of Birth (DOB): [redacted] [eye icon]

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.

Submit Cancel

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Action 4: 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.'

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 Experian is unable to verify your identity within three attempts or your session times out, you must complete *Document Submission/Validation* process for identity proofing.

Action 5: Congratulations! You have successfully completed the Experian identity verification.

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Welcome John Doe

Please answer the following questions:

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

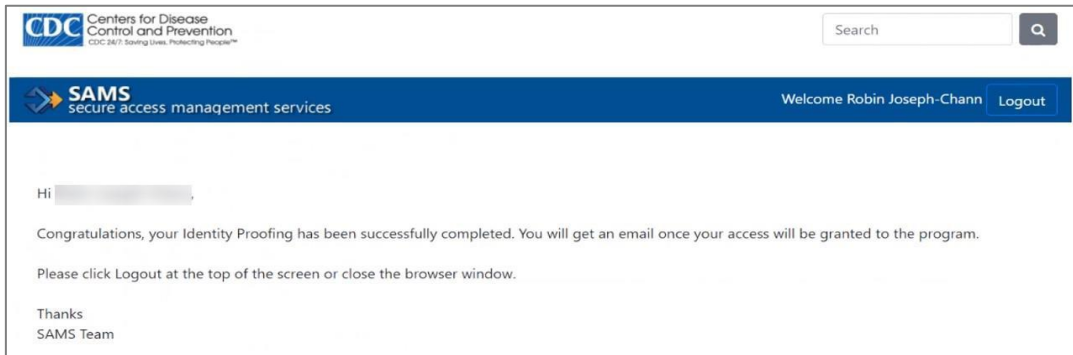
4). Name of a bank that issued you a credit card?

- ☐ Citi Bank
- ☐ Fifth Third Bank
- ☐ PNC Bank
- ☐ SunTrust Bank

Submit Cancel

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).

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Jumio Identity Proofing for International Submitters

International users utilize [Jumio](#) for identity proofing, as it accepts and verifies foreign IDs. This section outlines the recommended approach for international submitters identity proofing, Jumio. This version of identity proofing is completed in near real time.

Action 1: You will receive an email from SAMS containing a registration link. Follow the link to complete the SAMS registration. Upon completion, you will receive a link to your account and a temporary password. **The invitation is valid for 30 days.** Online registration through the SAMS portal takes approximately five minutes. Before starting, users should have the following information ready:

- Home address
- Organization/employer and address
- Primary telephone number (home or mobile)

Action 2: The user receives confirmation of registration with CDC's SAMS Partner Portal, along with a secure link to initiate the Jumio identity proofing process.

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Action 3: The user clicks the secure link to begin the identity verification process. They will be prompted to upload a government-issued photo ID and take a selfie for facial recognition verification.



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Welcome test sams2 [Logout](#)

SAMS Identity Validation for Non-US Citizens

Before starting the SAMS Identity validation process using Jumio, please validate the information below and provide your date-of-birth (DOB). This information will be used by Jumio to validate your identity. If you need to make any changes, please contact samshelp@cdc.gov.

First Name	test	Last Name	sams2	
Email Address	testsamsuser2@gmail.com			
Address	Street no 34535, SD Road Hyderabad TELANGANA 500060		Country	India

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

Date of Birth (DOB):



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You understand that by selecting the 'I AGREE' checkbox immediately following this notice, you are providing 'written instructions' to CDC to transfer information to Jumio. You authorize CDC to obtain such information solely to confirm your identity to avoid fraudulent transactions in your name.

☒ I Agree.

If you prefer to not complete the Jumio process, please click [here](#). This will cancel your current SAMS application and notify the inviting CDC Program to re-issue you an invitation using a sponsorship model instead of Jumio. Once this occurs you will be invited to re-register in SAMS and receive associated instructions about how to complete the identity validation process using a designated sponsor. This process could take several days to initiate.

Initiate Jumio Validation



Search



Welcome [Logout](#)

Before starting the SAMS international identity verification using Jumio, please ensure:

1. Your computer or mobile phone has access to a connected camera. You will be required to take a picture of required identity documents and your face to complete the Jumio process.
2. Confirm you have the identity documents approved by your country. For a list of approved documentation please review the list by clicking [here](#).

To initiate the Jumio process please click the button below. A link to initiate Jumio will also be sent to your email address to allow you to complete the process at your convenience from any desired device.

Initiate Jumio Validation

Action 4: SAMS will send an additional email containing a link that allows users to pause and resume the ID verification process at a later time, if needed. The Jumio process can be accessed from any device (phone, laptop, etc.) and may be attempted up to three times.

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Action 5: After submitting the ID and selfie, the user is redirected to a confirmation screen indicating that the submission was successful.

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 performed at your local bank or credit union at no cost for members. 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

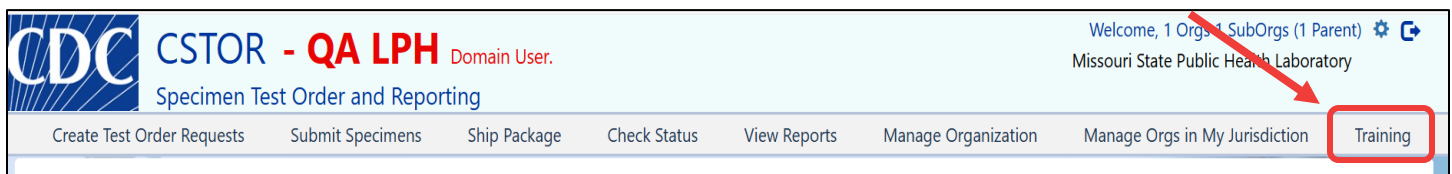
NOTE: You must bring the SAMS User Identity Verification Request Form, the actual ID, and the photocopy to the Notary.

Step 4: Access CSTOR Using SAMS Credentials and Complete Training

Now that your registration with the SAMS Partner Portal is complete, 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

Users can find CSTOR training material by clicking on the Training module within the CSTOR Web Portal (see screenshot below). If you have any additional questions not addressed in the training materials, please contact the [CSTOR Team](#).



Training Content includes written user guides with screenshot explanations as well as video demonstrations:

- CSTOR User Guide – Test Order Requests



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- CSTOR User Guide – Needs Attention
- CSTOR User Guide
 - Submit Specimens & Ship Packages
 - Submit Specimens Via Bulk Upload
 - Submit Specimens via Barcode Scan
- CSTOR User Guide – Check Status
- CSTOR User Guide – View Reports
- CSTOR User Guide – Manage Organization

When selecting the Training Module, you will be directed to training materials and two options: Ask CSTOR Help Desk and Request a training. Both options will direct your email and questions to the [CSTOR Help Desk](#).

 **CSTOR Training and Helpful Resources**

Ask CSTOR Help Desk

- Any other questions? The CSTOR Help Desk team is here to help!

Request a Training

- On demand training available with our CSTOR Training Team, to provide demos of the system or answer any questions you may have.

Upgrading your SAMS Account from Level I to Level II

Securing SAMS Level 2 access is a requirement to access the CSTOR Web Portal. The process for gaining access to the CSTOR web portal was demonstrated earlier in the flow chart at [Step 1](#).

The identity proofing process was explained in detail in [Step 3](#). It is important to note that the identity proofing process differs between domestic and international users. For domestic users, the identity proofing options are:

1. Experian Precise ID or
2. Document Submission & Notary Validation Process. For international users, the options are:
 - a. Jumio or
 - b. Document Submission & Notary Validation Process. SAMS Level I access involves registration ([Step 2](#)) but does not require identity proofing ([Step 3](#)).

If you already have SAMS Level I access and have been requested to be added to CSTOR ([Step 1](#)), you will skip the registration and instead start the process at the identity proofing ([Step 3](#)).

Once a Lab Admin from your organization has requested to add you as a user ([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.

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NOTE: If you do not receive your identity proof email within seven 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 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 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) or call Toll Free: (877) 681-2901
- Contact the [CSTOR Team](#)