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

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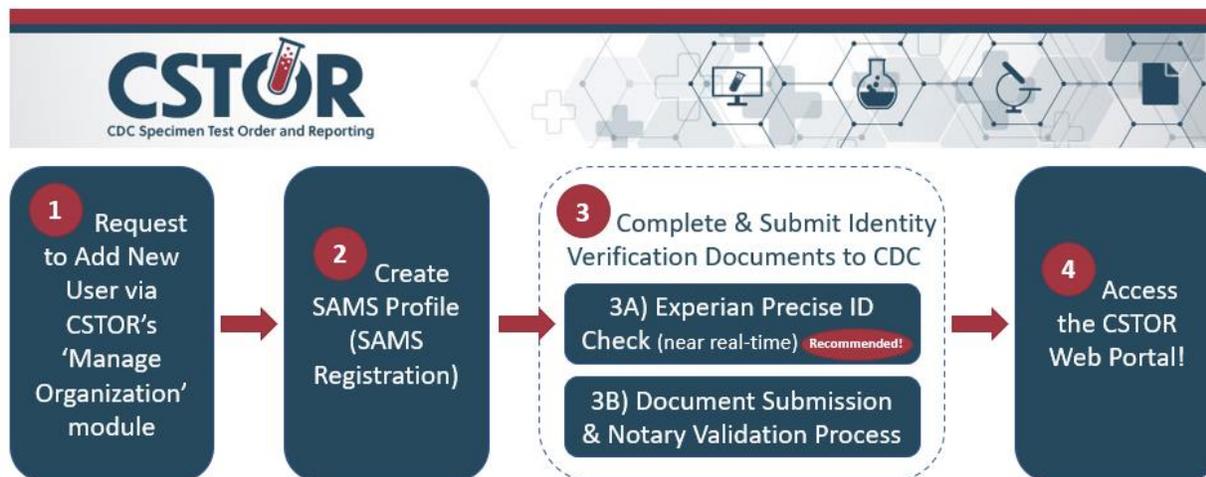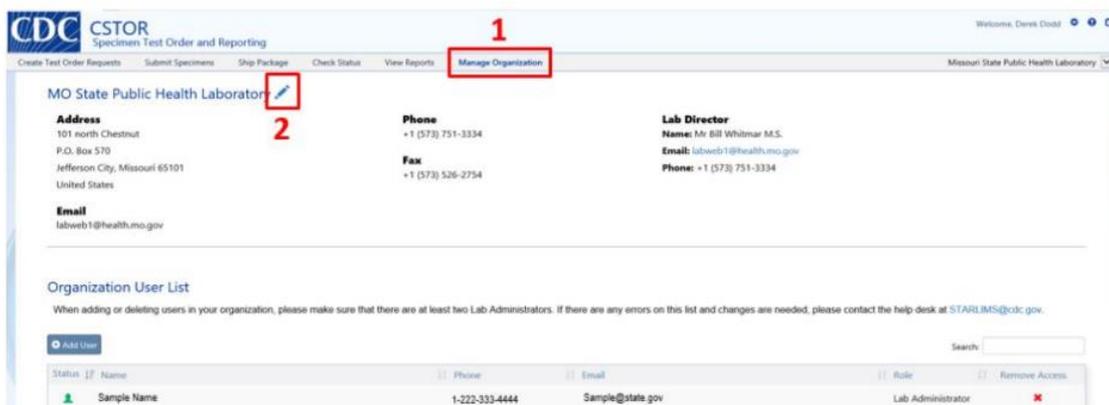
Step 1) Request to Add New User via CSTOR's Manage Organization Module

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.

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.

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_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.*

Instructions once you receive this email:

A Select the link

B Enter your username/email

C 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: xxxxx. *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
Date: June 2, 2021 at 9:54:53 PM EDT
To:
Subject: CDC: SAMS Partner Portal - Identity Verification Request Form

Hello ,

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, select 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.'

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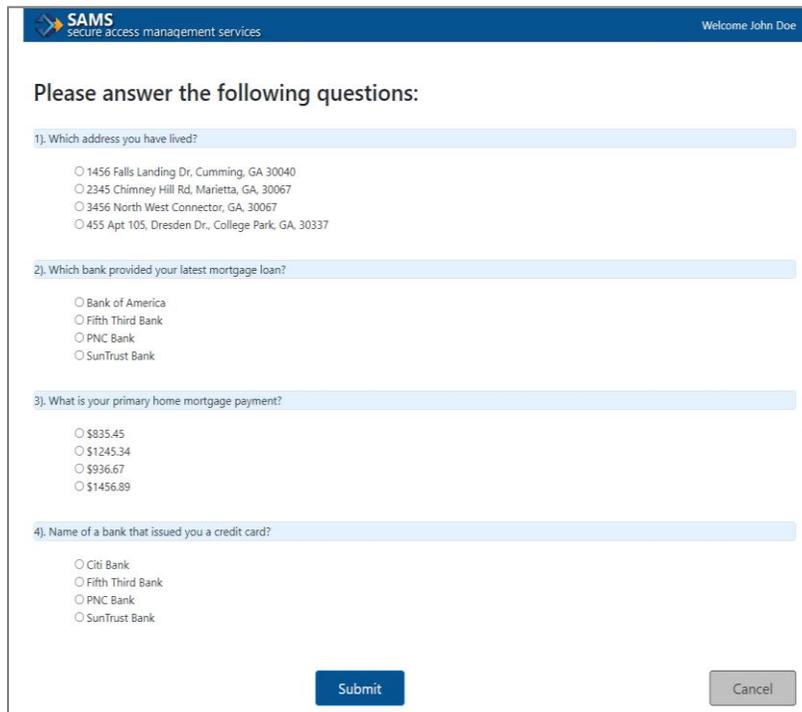
Step IV: Next, you will be asked a series of multiple-choice identifying questions. Please select the correct answers based on your personal identifying information, then select 'Submit.'

> <u>Please Note:</u> 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~~
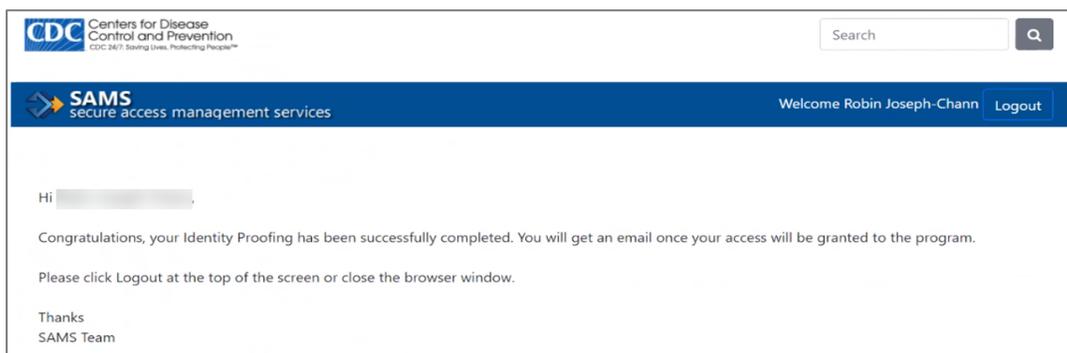

Step V: Congratulations! You have successfully completed the Experian identity verification.

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).

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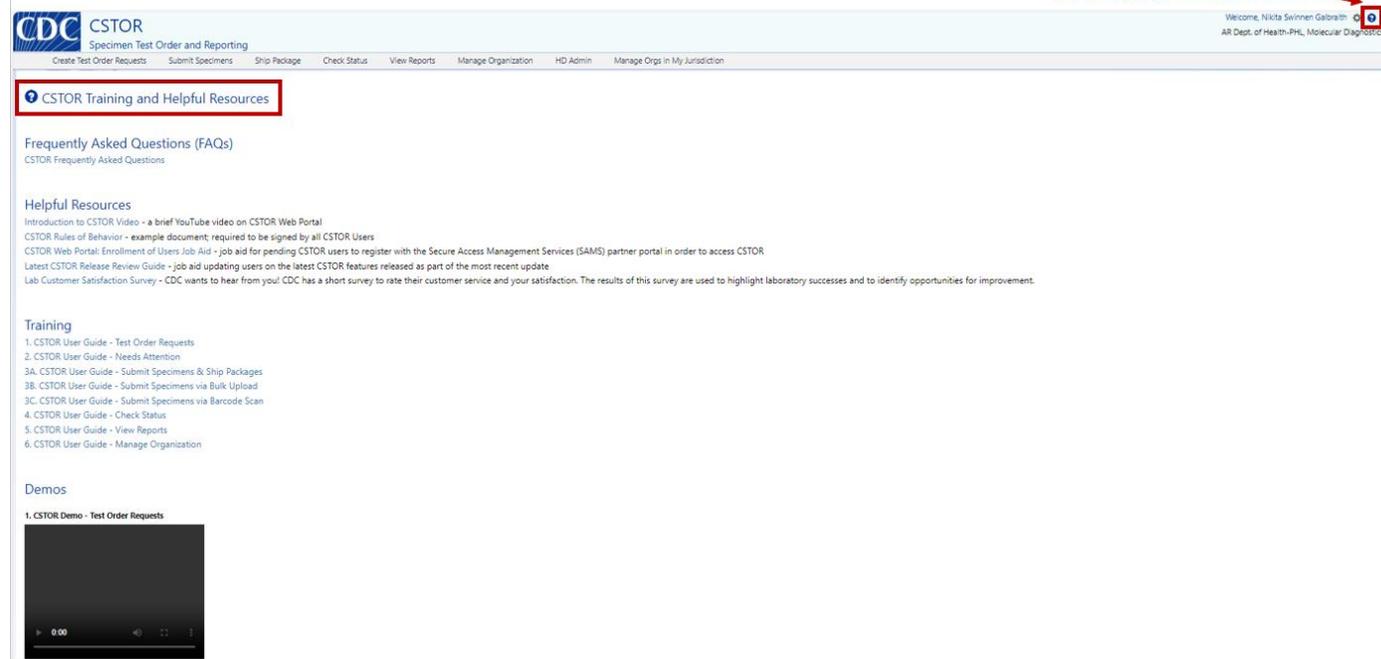
Training Content includes the following trainings as written user guides with screenshot explanations. Video training guides are also available.

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
    o Open between the hours of 8:00 AM and 6:00 PM EST Monday through Friday (excluding U.S. Federal holidays)
    o Toll Free: (877) 681-2901
- CSTOR Team