CDC Specimen Test Order and Reporting (CSTOR) Web Portal Frequently Asked Questions (FAQs) for Submitters

Contents

CSTOR General Information

ABOUT CSTOR AND SUBMITTERS

What is CSTOR (CDC Specimen Test Order and Reporting) Web Portal?

The Centers for Disease Control and Prevention (CDC) is excited to introduce the CDC Specimen Test Order and Reporting Web Portal (CSTOR, pronounced SEE-store), a central online gateway for CDC Infectious Disease (ID) Laboratory Partners to submit specimens and access test results and reports. Please refer to the CSTOR Web Portal page for additional information.

Who can submit via CSTOR?

Submitters can be anyone who is approved as a primary submitter (i.e., global submitter) to the CDC. For those state or federal level organizations who are interested in submitting, but are not yet approved as a global submitter, please contact the Infectious Diseases Specimen Submission (IDSS) Help Desk. Starting in 2024, organizations that are not state or federal level organizations such as hospitals, medical centers, clinical laboratories, universities, etc. are able to onboard to the CSTOR web portal with approval by the State Public Health Laboratory (SPHL) whose jurisdiction they fall under. These organizations (called 'original submitters') submit under the jurisdiction of the SPHL, and the SPHL has enhanced visibility and oversight. See the 'CSTOR Original Submitter Onboarding (COSO)' FAQs document and the questions in the 'Manage Organizations in My Jurisdiction' module later in this document to learn more.

Can you have more than one user in CSTOR?

Yes, you can have as many Lab Users/Lab Administrators in CSTOR as desired. There is a minimum requirement to have at two active Lab Administrators at all times, to prevent any discontinuity due to personnel changes. To onboard the initial two Lab Administrators, please contact the CSTOR Team. Once the initial two Lab Administrators are onboarded, they can add as many Lab Users or other Lab Administrators for their organization as needed in the 'Manage Organization' module within CSTOR.

Do I have to pay to onboard or use CSTOR?

CSTOR is available at no cost.

What is the difference between the Lab Administrator and Lab User roles in CSTOR?
Lab Users: Can request Test Order Requests (TORs), create/edit specimen submission forms, ship packages, check status, receive reports, and access the dashboard and training/helpful resources.
Lab Administrators: Can request TORs, create/edit specimen submission forms, ship packages, check status, receive reports, and access the dashboard and training/helpful resources (like Lab Users). Lab Administrators can additionally access the 'Manage Organization' module, where they can add/remove users in their organization and edit the organization level information. If your organization has original submitter organizations onboarded in your jurisdiction, Lab Administrators also have access to the 'Manage Orgs in My Jurisdiction' module, where they can access the 'Original Submitter Onboarding' tab and the 'Test Order Request Permissions Management' tab, to approve/reject pending original submitter onboarding request or manage which TORs require SPHL review and approval prior to original submitters being allowed to submit directly to the CDC, respectively.

Where can I find CSTOR training material?
CSTOR training material can be found by clicking on the blue [?] icon in the top right-hand corner (next to the user's name) within the CSTOR web portal. Training materials include both written user guides and video CSTOR demos. If you have any additional questions not addressed in the training materials, please contact the CSTOR Team.

Who do I contact about questions on shipment, specimens, etc.?
For test order specific questions, please refer to the Test Order Directory (TOD). The TOD additionally includes a Point of Contact for each test order for additional test order specific questions. For general questions, please email the CSTOR Team.

CSTOR Functionality

CREATING TEST ORDER REQUESTS (TOR)

How do I know whether a Test Order Request (TOR) is auto-approved or requires CDC pre-approval? What does this mean?
Whether a TOR requires CDC pre-approval is listed on the right-hand side of the TOR creation pop-up once a test order name or code has been selected. If the selected test order requires approval, "CDC Lab Pre-Approval is required for this Test Order" will

appear, including a link to the CDC Test Order Directory (TOD) for more information under the blue informational 'i' icon. Whether a test order is auto-approved or requires pre-approval is noted within the CDC TOD in the 'CDC Pre-Approval Needed' field. If a test is auto-approved, you will immediately receive approval and will be allowed to input specimen information. If a test requires pre-approval, the TOR will be 'Pending CDC Approval,' and you must wait until approval is granted before submitting the specimens to the CDC.

What happens when I create and submit a Test Order Request (TOR) that is auto-approved?

If approval is not required (i.e., auto-approved) for the TOR, the TOR will automatically appear as 'Approved' in CSTOR. You may continue with the submission process by finding the TOR in the 'Approved Test Order Requests' tab in the 'Submit Specimens' module and using one of our four specimen information import methods.

What happens when I create and submit a Test Order Request (TOR) that requires CDC pre-approval?

For test orders that require prior approval by the CDC, submitting your TOR will trigger an email to be generated to the Test Order's Point of Contact to initiate a review of your TOR, and your TOR will be in a 'Pending CDC Approval' status. CDC Test Order Points of Contact (POCs) will have the opportunity to approve (with optional comments) or reject (with required comments). This approval process is managed within the CDC's Enterprise Laboratory Information Management System (ELIMS). When your request is approved or rejected, you will receive an email alert. If approved, the TOR will appear in the 'Approved Test Order Requests' tab in the 'Submit Specimens' module and you may then continue with the specimen submission process in CSTOR.

Does everyone in my organization receive email notifications after creating a Test Order Request (TOR)?

Currently, TOR-related system notifications only go to the individual that created the test order. However, all users can see the status of TORs submitted by anyone in their organization in the 'Organization Test Order' sub-tab of the 'Test Order Request' tab in the 'Check Status' module. Users can additionally see approved TORs for all members of their organization in the 'Organization Requests' tab of the 'Approved Test Order Requests' page in the 'Submit Specimens' module.

SUBMITTING SPECIMENS AND SHIPPING PACKAGES

How do I know which specimen submission fields are required for the Test Order that I am submitting?

The information required for a test order is noted within the CDC Test Order Directory (TOD) in the 'Supplemental Information Required' field. The TOD page is linked in the draft specimen grid by a blue informational [i] icon in the 'Submit Specimens' module within CSTOR.

Does CSTOR validate incoming data?

CSTOR retains the same validation as found on the 50.34 Specimen Submission Form and the Global File Accessioning Template (GFAT), which includes drop-down lists for some field values and formatting requirements for fields such as dates, times, etc.

If I submitted the Test Order Request (TOR), can my colleague fill out and submit the specimen submission information or prepare the package for shipment?

Yes, colleagues in your organization can access TORs you've submitted in the 'Organization Requests' tab within the 'Approved Test Order Requests' page in the 'Submit Specimens' module, allowing a colleague to provide specimen submission information for a TOR that you initially created. Anyone in your organization can access all specimens created in your organization in the 'Available Specimens for Shipment' grid in the 'Ship Package' module, allowing seamless cooperation between colleagues.

Can I include supplemental files with my submission?

Yes, there are currently two options to upload supplemental files:

- At the Test Order Request (TOR) level, by selecting the 'Attach File' button when creating or editing a TOR
- At the specimen level, by selecting the attachment icon in the 'Specimen Form(s)' pop-up in the draft TOR grid

What happens if a package was addressed to the wrong laboratory?

If a package was shipped to the correct shipping address but with the wrong laboratory labeled, CDC Specimen Triage and Tracking Team (STATT) is able to correct the label and direct the package to the correct laboratory.

Can CSTOR be used to ship specimens to the CDC in Atlanta and other locations?
Yes. CSTOR can be used to submit specimens to the Atlanta (Georgia), Fort Collins (Colorado), and San Juan (Puerto Rico) CDC locations. CSTOR can additionally be used to ship packages for rabies or viral special pathogens testing, as long as the specimens are included in a separate physical box, and the shipping destination includes Rabies or VSPB respectively.

CHECKING STATUS

When do I receive a notification from CSTOR via email?
You will receive an email notification when your pending Test Order Request (TOR) has been approved or rejected by the CDC, when your package has been received at the CDC, if you have a "Needs Attention" tile that requires specimen data correction, or when a new report is released for a specimen you created.

What do the Test Order Request (TOR) statuses mean in the 'Check Status' module?

- **Approved**: TOR that are auto-approved or require pre-approval and have received it from the test order's CDC point of contacts
- **Draft**: When a test order has not yet been submitted to the CDC
- **Pending CDC Lab Approval**: TOR that require pre-approval from the CDC and are awaiting approval from the CDC point of contact
- **Rejected by CDC Lab**: TOR that have been rejected by the test order's CDC point of contact

What do the Specimen statuses mean in the 'Check Status' module?

- **Accessioned**: The specimen is being accessioned by CDC
- **Attention**: When a specimen has been flagged as needing correction (pre-accessioning) by the CDC
- **Corrected**: When a specimen that has been flagged as needing correction (pre-accessioning) by the CDC has been corrected by someone in your institution
- **Draft**: When a specimen has not yet been included in a package submitted to the CDC
- **Intransit**: When a specimen is in a package that is in transit to the CDC but not yet received
- **Received**: When a specimen is in a package that has been received by the CDC but not yet accessioned

What do the Package statuses mean in the 'Check Status' module?

- **Draft**: When a package has not yet been submitted, i.e., is not yet shipped
- **Intransit**: When a package has been indicated it is in transit to the CDC by having clicked "Ship Package" within the 'Ship Package' module
- **Received**: When a package has been received by the CDC

VIEWING RESULTS AND REPORTS

How can I review and export results using CSTOR?

Once specimen test results and reports are approved for release, they can be accessed in CSTOR's 'View Reports' module. To export results, highlight the desired rows and click the 'Export Selected Rows' button. To view or download a copy of the PDF report, click on the paper [PDF] icon in the far right of the desired row.

Can I hide reports that have already been viewed?

Yes, you can archive reports that have already been viewed. In the 'View Reports' module on CSTOR, select the [eye] icon to hide a report from view from everyone in your organization. To see all reports in your grid, including those hidden from view, select the 'Include Hidden Reports' checkbox in the top right corner.

Why is my report not showing up in CSTOR?

There are several reasons your report might not be showing up in CSTOR:

- Check to make sure that the 'Include Hidden Reports' checkbox is selected in case one of your colleagues has hidden the report from view.
- Your report could be for an archived specimen. If the report is for a specimen submitted over a year ago, please contact CSTOR Help Desk at cstor@cdc.gov for assistance unarchiving the specimen so that the report become available again.
- If you are a member of multiple organizations (e.g., State Public Health Laboratories that have locations in multiple cities or have their divisions set up as separate accounts), please make sure you have selected the correct organization from the dropdown in the top right next to your name.
- If the report was released via a hard-copy PDF using non-enterprise CDC report delivery methods, it may not appear in CSTOR. Please reach out to the CDC testing laboratory in those cases for troubleshooting report access.

You may also view the View Reports User Guide within the 'CSTOR Training and Helpful Resources' page (blue [?] in the top right) for more information. If you are still struggling to find your report, reach out to the CSTOR Team.

Who gets notified when there is a new report available? How do I control who gets notified?
When a new report is available, an email notification is sent out to the user that is listed on the specimen submission form in the 'Institution POC Email' field *and* any users that are set up in the 'Manage Organization' module in the 'Report Notification Email' section. To control who gets email notifications when a new report is available, add or remove users from this list using the 'Add Email' button or the red 'X' button, respectively.

Does CSTOR deliver reports directly to original submitters for specimens they submit directly to CDC via CSTOR?
CDC currently delivers reports in CSTOR only to state or federal level organizations. State Public Health Laboratories should continue to use their existing report delivery workflows outside of the CSTOR system to deliver results/reports back to organizations in their jurisdiction, regardless of whether those organizations submitted the specimens to CDC via CSTOR.

CSTOR Lab Administrators

MANAGING ORGANIZATION

How do I request to add a new user in my organization?
CSTOR Lab Administrators can add or remove users in the CSTOR 'Manage Organization' module. Select 'Add User' and complete the required fields. You may also view the 'Manage Organization' user guide within the 'CSTOR Training and Helpful Resources' page (blue [?] icon in the top right) for more information.

Can I remove a Lab Administrator from my organization?
Yes, Lab Administrators can remove users from the organization, including other Lab Administrators, as long as there are always at least two Lab Administrators active in CSTOR, to prevent any discontinuity due to personnel changes.

How can I change a user's role from Lab User to Lab Administrator or vise-versa?
An existing CSTOR Lab Administrator can change another user in their organization's user role using the edit [pencil] icon next to that user's name in the Users grid in the 'Manage Organization' module.

MANAGE ORGS IN MY JURISDICTION

What is the CSTOR Original Submitter Onboarding (COSO) functionality?
Starting in 2024, CSTOR expanded access to allow for original submitters (e.g., hospitals, universities, medical centers, commercial laboratories, etc.) to onboard to the CSTOR Web Portal to submit directly to the CDC with approval from the State Public Health Laboratory (SPHL) whose jurisdiction they fall under. This allows for enhanced SPHL visibility into submissions coming from within their state, and grants SPHLs review and approval capabilities. For additional information on the COSO functionality, see the COSO FAQs document.

What non-federal and non-state level organizations are eligible to onboard to CSTOR?
Anyone that submits in the original or intermediate submitter sections of the specimen submission form are able to onboard to CSTOR under the jurisdiction of a parent State Public Health Laboratory (SPHL) (including hospitals, medical clinics, veterinary institutions, commercial laboratories, university health centers, etc.). Organizations that fall 'under the jurisdiction' of you as a state-level organization, are those that submit with you in the SPHL/Institution section of the specimen submission form.

What level of oversight does the 'parent' State Public Health Laboratory (SPHL) have over Original Submitters in their jurisdiction?
Onboarding: The 'parent' SPHL is notified anytime an original submitter in their jurisdiction requests to onboard to CSTOR. SPHL CSTOR Lab Administrators receive an email notification and a new Needs Attention tile on their dashboard. They are able to review and approve/reject the pending Original Submitter Onboarding Request in the 'Original Submitter Onboarding' tab of the 'Manage Orgs in My Jurisdiction' module.
Specimen Submission: The 'parent' SPHL gets visibility into submissions that are being sent in by original/intermediate submitters that have onboarded to CSTOR in your jurisdiction. In the 'Manage Orgs in My Jurisdiction' module, CSTOR Lab Administrators are able to specify in the 'Test Order Request Permissions Management' tab which test

orders require SPHL review and pre-approval prior to the original submitter being able to submit those specimens to the CDC.
Reporting: Results and reports are delivered only to the state-level organization. State Public Health Laboratories should continue to use their existing report delivery workflow to transmit relevant reports to the organizations within their jurisdiction.

How can State Public Health Laboratories (SPHLs) control which submissions from organizations in their jurisdiction require SPHL review and pre-approval prior to original submitters sending in specimens directly to the CDC?
Within the 'Manage Orgs in My Jurisdiction' module, CSTOR Lab Administrators can specify in the 'Test Order Request Permissions Management' tab at the test order level which submissions require SPHL review/pre-approval ('Require Pre-Approval'), which ones are able to be sent directly with no SPHL review ('Auto-Approved') and which ones are never able to be sent directly to the CDC ('Auto-Reject). If you decide to have a pre-approval required, your review as SPHL within CSTOR will be required before organizations in your jurisdiction are allowed to submit specimens.

How can I see specimen information for specimens that have been submitted by original submitters within my jurisdiction and are: a) pending State Public Health Laboratory (SPHL) approval b) were submitted and auto-approved by the SPHL or were previously approved by the SPHL reviewer or c) were previously rejected by the SPHL reviewer?
From within the 'Manage Orgs in My Jurisdiction' module, all users with Approver Permissions are able to access the 'Test Order Request Approvals' tab. Filtering this tab allows users to see the specimen information for requests that fall within that status:
a) 'Pending' status (default filtering) – for requests that are pending SPHL review and approval
b) 'Approved' status – for requests that were submitted and auto-approved by the SPHL or were previously approved by the SPHL reviewer
c) 'Rejected' status – for requests that were previously rejected by the SPHL reviewer
To see specimen information, review the contents of the grid (test order ID, test order name/code, submitting organizations, origin, source type(s), suspected agent, number of samples, who it was submitted by, any submitter comments, the date submitted, the number of attached files, the current status, who it was approved/rejected by, the approval/rejection date, the approval/rejection comments). You can additionally select

the ‘View TOR Details’ button to pull up a pop-up where you can download the associated specimen submission form(s) by:

- Selecting the PDF [paper] icon to individually download a PDF form
- Multi-selecting the checkboxes for your desired specimen forms and selecting the ‘Download Selected PDF’s’ button to download a ZIP file of the specimen forms you marked
- Selecting the ‘Download All’ button to download a ZIP file of all of the attached specimen forms

How can I control who from my organization gets notified when there is a new Test Order Request (TOR) from an original submitter in my jurisdiction pending State Public Health Laboratory (SPHL) review and approval?

Any user in your organization with the ‘Original Submitter TOR Approver Permission’ set to ‘Yes’ in the ‘Manage Organization’ users grid will receive an email notification when a new pending TORs has been submitted. To change who has this permission, a CSTOR Lab Administrator can use the edit [pencil] icon in the user’s row in the ‘Manage Organization’ users grid then change their ‘Original Submitter Test Order Request Approver’ permissions in the drop-down of the subsequent pop-up.

How can I control who from my organization has the ability to review and approve or reject a Test Order Request (TOR) from an original submitter in my jurisdiction that requires State Public Health Laboratory (SPHL) approval?

Any user in your organization with the ‘Original Submitter TOR Approver Permission’ set to ‘Yes’ in the ‘Manage Organization’ users grid is able to review and approve or reject a request when a new pending TOR has been submitted by an original submitter in your jurisdiction. To change who has this permission, a CSTOR Lab Administrator can use the edit [pencil] icon in the user’s row in the ‘Manage Organization’ users grid then change the user’s ‘Original Submitter Test Order Request Approver’ permissions in the drop-down of the subsequent pop-up.

How can I manage who is able to approve original submitter onboarding requests?

CSTOR Lab Administrators are able to approve onboarding requests from original submitters in your jurisdiction, while CSTOR Lab Users are not. To change who has the CSTOR Lab Administrator user role, a CSTOR Lab Administrator can use the edit [pencil]

icon in the user's row in the 'Manage Organization' users grid then change the user's role to or from 'Lab Administrator' in the drop-down of the subsequent pop-up.

How do original submitters in my jurisdiction request to onboard to CSTOR?
Original submitters within your organization can request to onboard using the CDC's secure CSTOR Original Submitter Onboarding Request Form hosted on REDCap. This form contains questions surrounding the original submitter's organization information (address, phone, email), organization director information, and information for their two desired CSTOR Lab Administrators. Once the form is submitted, it goes through an initial CSTOR help desk review then an email is sent to the parent State Public Health Laboratory (SPHL)'s CSTOR Lab Administrators for SPHL review and approval in the 'Original Submitter Onboarding' tab of the 'Manage Orgs in My Jurisdiction' module.