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Introduction

General Use

**Required Fields:** Red asterisks (*) denote required fields. Fields that do not contain red asterisks are optional or conditional fields.

**Field Formats:**

- **Dates:** All dates must be entered in the “MMDDYYYY” format without spaces, dashes, or hyphens. For example, the date of birth of September 15, 1980 would be entered as “09151980”.

- **Email Addresses:** All email addresses must be entered in the x@y.z format. For example, jsmith@organization.com.

**General Navigation:** You can navigate through the system by using the in-page navigation links and buttons. You can also use the Home and Logout links located in the upper right corner of the screen to return to home or log out of the system.

*Note: Please do not use the “Back” or “Forward” buttons in your web browser for navigation.*

**Log out of ESORI Portal:** To log out of the ESORI Portal, click the “three dot icon” next to your username in the application header and select the Logout link.
Homepage
The homepage is the default page in the ESORI Portal you are directed to when you log in. Below the system header is a top navigation bar that contains links to all of the functions in the ESORI Portal. Your most recent 5 submitted requests will be displayed on the homepage as well.
Submit Single Request
Follow the steps below to submit an ESORI request for one subject.

1. Select the Submit Single Request option from the ESORI Portal homepage.

2. Enter the information for the ESORI request subject and click the Continue button. Note that First Name, Last Name, and Date of Birth are required.

3. Review your information on the Verify Request Details page and click the Submit Request button. If you need to modify your request information, click the Edit button.

4. Your request information will be submitted and you will be directed to a confirmation page. Once there is a result for your request, you will receive an email indicating so. You can view request result information from the Request History & Results area of the ESORI Portal.
Submit Batch Request

Follow the steps below to submit an ESORI request for multiple subjects. Note that you can download the Batch Upload Requirements and the Batch Template from the ESORI Portal homepage.

1. Select the Submit Batch Request option from the ESORI Portal homepage.

2. Upload the completed batch request spreadsheet using the Choose button on the Batch Request Details page. Note that First Name, Last Name, and Date of Birth are required for all subjects.

3. Click the Continue button.

4. Review your information on the Verify Request Details page and click the Submit Request button. If you need to modify your request information, click the Edit button.

5. Your request information will be submitted, and you will be directed to a confirmation page. Once there is a result for all subjects within your batch request, you will receive an email indicating so. You can view request result information from the Request History & Results area of the ESORI Portal.
**Request History & Results**

Click the **Request History & Results** option from the top navigation bar to view your submitted requests and results.

Your most recent 500 requests will be displayed on the page by default. If you would like to view additional results, apply a filter by clicking the **Add Filter** button on the page.

To view the details for your request, click the blue “I” icon next to a specific result. To download the result letter for a request, click the green “download” icon next to a specific result. Result letters are provided in PDF format.
Manage Account

Change Account Email
Follow the steps below to change the email address associated with your account.

1. Click the Account Details option from the top navigation menu.

2. On the Account Details page, select the Change Email button.

3. Enter your new email address twice and click the Submit button.

4. The system will send an email to the new email address you provided with a link for you to confirm the email change. Your account email address will not be changed until the new email address is confirmed.

5. Click the Confirm Email link from the ESORI Portal Email Change Notification email.

6. The system will direct you to the Confirm Email Change page. Select the Security Code and click the Confirm Email button.

7. The system will direct you to a confirmation page that will indicate your account email was changed successfully. All future ESORI Portal related emails will be sent to the new email address.
Edit Account Details
Follow the steps below to edit your account details.

1. Click the Account Details option from the top navigation menu.

2. On the Account Details page, select the Edit Details button.

3. Make any changes to your information and click the Submit button. Please note that your account type and username cannot be changed.
Cancel Account

*Warning: This action cannot be undone. Once you cancel your account, you will not be able to access it or your submitted requests again.*

1. Click the **Account Details** option from the top navigation menu.

2. On the Account Details page, select the **Cancel Account** button.

3. You will be directed to the Cancel Account page to confirm the action. Select the **Yes** button to cancel your account.