



CPL Portal: Quick Start Guide

Launching August 3, 2026

QUICK SUMMARY

- All users must create a portal account if they don't already have one.
 - **UCD users** – No billing account needed (just use your Aggie Enterprise chart string)
 - **Non-UCD users** – Must request a billing account prior to submitting
 - **Project Inquiries** are required for research project submissions
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ALREADY A CPL PARTNER?

- Your account and billing information will exist in the new system.
 - The first time you log in to our new portal, use your existing email to log in/reset your password.
 - We are mapping billing accounts to clients. If you log in and do not see your billing account, you can obtain access to it in two ways:
 - [Contact us](#) and provide the billing account ID number.
 - Have someone that already has access to that account share it with you.
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GET UP AND RUNNING IN JUST A FEW STEPS:

Step 1: New to CPL? Create Your Account

- Go to <https://portal.cpl.ucdavis.edu> and click **Request Account**
- Register using your institutional email account
- You will receive an email with a link to set your password
- This one-time setup enables all portal features

Step 2: Set Up Billing

UC Davis Users

- No billing account setup required
- Use your Aggie Enterprise chart string (GL or PPM) directly during submission
- Chart strings are validated in real time

Non-UC Davis Users (including other UC campuses)

- You must have a CPL Billing Account before requesting services

To request a billing account:

1. Go to **My Account** → **Billing Accounts** → **Account Setup**
2. Enter:
 - Organization/contact information
 - Billing and shipping address
 - Account type (External or Inter-campus UC)
3. Submit for approval – You'll be notified when your account is active



- **Note:** If you will be using the same billing account as an existing user, that user can share that billing account with you under **My Accounts → Billing Accounts**, and clicking “Share” for that account.

Step 3: Request an Estimate

- Required for research project submissions; optional for all other submissions
- Submit a Project Inquiry/Estimate Request with:
 - Study details
 - Sample information
- CPL will provide an estimate for your project (typically within 3 business days)
 - You can use this estimate to begin your submission by going to **Projects & Estimates → Estimates** and clicking **Start Submission**
- **Note:** Estimates can be shared to other portal users by the requester. Simply click “Share” at the top right of the page when viewing the estimate.

Step 4: Create Your Submission

- If applicable, you may start from an approved estimate (**Projects & Estimates → Estimates → Start Submission**)
- If you are submitting anything other than a research project, simply go to **Request Services → New Submission**, and choose either **Health Surveillance Program** or **Clinical Diagnostics**.
- **Enter:**
 - Sample details
 - Required documentation
- **Select billing method:**
 - Aggie Enterprise chart string (UCD) OR
 - CPL Billing Account
- **Print the confirmation page to accompany your samples to CPL.**

Step 5: Track and Access Results

- View reports under **Reports & Submissions → Case Reports**
- Track status as results are entered
- Access reports directly in the portal (PDFs available)
- For **Research Projects** with multiple submissions, all associated cases are grouped together under a single project.
- **Note:** You can duplicate prior submissions to use in the future under **Reports & Submissions → Prior Submissions**

KEY THINGS TO KNOW:

- Each sample group can use a different billing method
 - Submissions are blocked if required billing setup is incomplete (non-UCD users)
 - Setting up your billing account and requesting an estimate before you’re ready to submit will significantly shorten your project turnaround
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NEED HELP?

- Contact CPL (cpl@ucdavis.edu; 530-752-2832) for:
 - Billing account approval questions
 - Submission issues
 - Expedited requests

FREQUENTLY ASKED QUESTIONS

I never received my account setup email.

Check your spam/junk folder. If it is not there, contact CPL to confirm your request was received and your email address has been entered correctly.

My password reset link didn't work.

Reset links are single-use and expire after a short time. Request a new one using the **Forgot Password** feature.

I keep getting logged out.

The session timeout is set to 15 minutes of inactivity. If you are being logged out frequently, ensure you are not leaving the browser idle. Clicking **Stay Logged In** on the warning dialogue extends your session.

Can I have multiple accounts?

Each email address maps to one portal account. If you need access under a different email, please contact CPL.

I'm a UC Davis user – do I need to request an account?

Yes – all users need a portal account regardless of institution. However, UCD email holders can submit services using an Aggie Enterprise chart string without needing a CPL billing account.

I submitted a CPL Billing Account Request. How long does approval take?

Approval times vary depending on the completeness of the request. Most requests are reviewed within a few business days. If you have an urgent need, please contact CPL to request expedited review.

I have a CPL Billing Account, but it doesn't appear in the CPL submission form dropdown.

Confirm the account is approved (visible on your **Billing Accounts** page). If it is listed there but not on the submission form, try logging out and back in to refresh your account data.

I had a CPL Billing Account in the old portal, but don't see it in the new portal.

Your existing billing account is still in our system. We are in the process of mapping these billing accounts to clients. Please contact us and provide the billing account ID number and we can link it. Alternatively, someone else from your organization with access to the billing account should be able to share it with you.

Can I use different CPL Billing Accounts for different sample groups?

Yes. Each sample group has its own billing section and can use a different chart string or CPL Billing Account independently.

What is the CPL Billing Account ID?

This is CPL's internal identifier for your billing account. You may need to reference it when communicating with CPL about invoices or account issues.