CSAT Account Management
User Guide

March 2011
Version 2.1

Homeland Security

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1. Overview

The Chemical Security Assessment Tool (CSAT) is a system used by the Department of Homeland Security (DHS) to collect and analyze key data from chemical facilities pursuant to Section 550 of the DHS Appropriations Act of 2007 (P.L. 109-295), and the implementing regulations (6 CFR Part 27). Within CSAT is the Account Management application, which allows users to manage their CSAT accounts. The CSAT Account Management application can be used to update user information, reset passwords, and eliminate multiple user names assigned to one individual. Likewise, users can transfer their roles to other accounts and add a facility to their existing responsibilities.

1.1 CSAT User Roles

The assignment of CSAT user roles and responsibilities will be based on each Organization's business needs and organizational structure. The CSAT system was designed to allow each Organization to determine the best way to provide information to DHS. Its flexibility requires some planning before an Organization assigns specific user roles to individuals. The following roles are defined in CSAT:

CSAT User Role	Description
Preparer	A user who is authorized to enter the data into the CSAT system, but not to submit the data to DHS.
Submitter	A user who is designated by the company to submit the information collected in the CSAT system to DHS.
Authorizer	A user who provides assurance to DHS that the Submitter and Preparer are authorized to complete the CSAT information.
Reviewer	A user who is allowed to review information but not to enter, edit, or submit the information. This is an optional, read-only role and may only be assigned after the facility has completed the registration process.

A Preparer, Submitter, and Authorizer *must* be identified for each Facility. The Preparer, Submitter, and Authorizer can be the same person or different individuals. Each Facility can have unique Preparers, Submitters, Authorizers, or Reviewers. All Facilities—or a subset of Facilities—within the same Organization can share these roles.

1.2 When to Update Your CSAT Account

You should update your CSAT account when:

- Your personal information has changed, such as your name, address, phone number or e-mail address; or

- You want to change your password before it expires.

If you have registered yourself as a CSAT user through the CSAT User Registration application, your password is valid for 90 days. Two weeks before your CSAT password expires, you will receive an e-mail that instructs you to change your password and it will direct you to the CSAT Account Management application. Once updated, your new password will be valid for 90 days. If you have forgotten your password, you will need to call the CSAT Help Desk at 866-323-2957 to have it reset.

1.3   When to Transfer Your CSAT Account Roles

You should transfer some or all of your CSAT account roles to another user when:

- You are leaving your organization;

- Your responsibilities no longer include CSAT input; or

- You have two or more user names and would like to only have one.

You can transfer your CSAT role to an existing CSAT user or a new user. If the transferee is a new user, a User Change Request PDF form must be created, signed, and submitted. See Section 4.1.2 for more details.

NOTE: After you transfer a role for a particular organization, you will no longer have access to that role. You will retain the roles that you did not transfer and will still have access to the CSAT system to perform those roles; however, if you transfer *all* of your roles, then you will no longer have access to the CSAT system.

1.3.1   Multiple CSAT User Names

Every time the CSAT User Registration System is used to register a new Organization and Facility, a new user name is created regardless of whether the same individual from a previously registered Organization and its Facility or Facilities are specified. For example:

- If one Submitter is responsible for multiple Facilities and all of his/her Facilities are entered during one registration event, then that Submitter will be granted one user name and password.

- If a Submitter's information is entered for only one Facility at a time, that Submitter will receive one user name and password for *each* separate registration form submitted. The transfer option in the CSAT Account Management application can be utilized to eliminate the extra user names assigned to a single individual.

2. Getting Started

To access the CSAT Account Management application, select the CSAT Manage My Account command on the **Web Bookmarks** menu after logging in to the CSAT system. The CSAT Account Management application's main menu will appear, as seen in Picture 2.1.
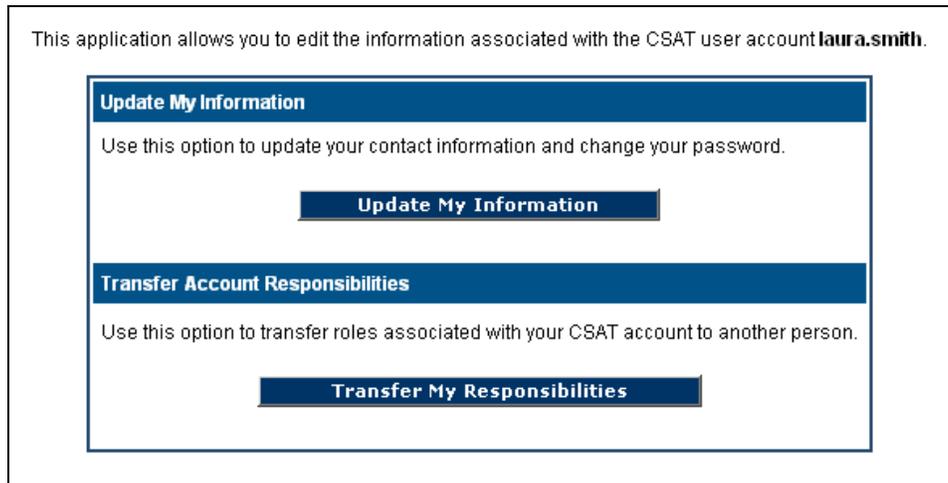
Picture 2.1: CSAT Account Management Application Main Menu

The main menu will provide you with two choices:

- Update My Information, which is reviewed in Section 3 of this guide; or
- Transfer Account Responsibilities, which is reviewed in Section 4.

When you are finished using the application, click the [Return to the CSAT Home Page] button above the main menu to access the CSAT system.

3. Updating Account Information

To update your account information, click the [Update My Information] button on the main menu of the CSAT Account Management application. The **Update Account Information** screen will appear, as seen in Picture 3.1, and it will display your most recently submitted account information. ***NOTE:*** To update an account, you *must* be logged in to CSAT with the user name of the account that needs updating.

Picture 3.1: Update Account Information Screen

You can update the following information on the **Update Account Information** screen:

- First name
- Last name
- Mailing address
- City
- State
- Zip code
- Phone number, and
- E-mail address.

NOTE: Most Organization information (e.g., owner/operator name or Facility name) cannot be changed through the CSAT Account Management application. Instead, use the **Update Facility Information** screen in the CSAT Top-Screen application to make the necessary changes. See the CSAT Top-Screen Survey Application User Guide for more details.

When you finish updating your account information, click the [Submit] button on the bottom of the screen. Your information will be updated and an account information update verification message will appear, as seen on Picture 3.2.
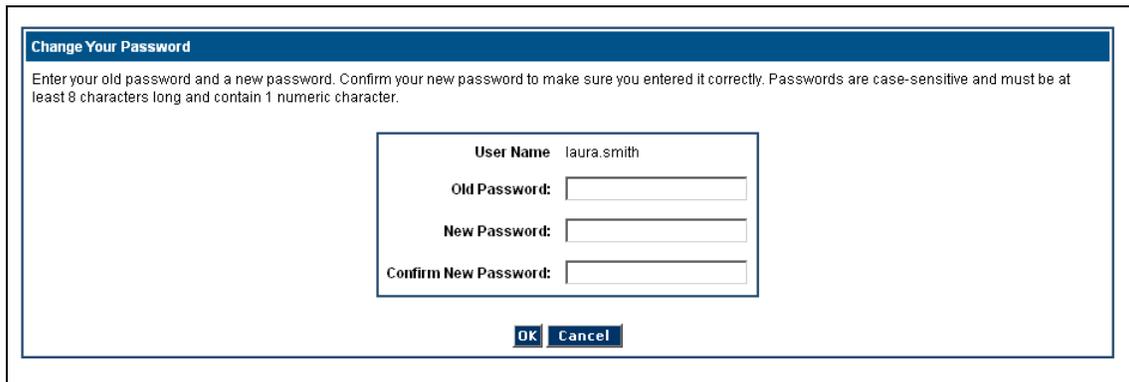
The account information has been updated.
Return to Account Information **Close**

Picture 3.2: Account Information Update Verification Message

- To go back to the **Update Account Information** screen to make more changes, click the [Return to Account Information] button.

- To leave the Account Management application, click the [Close] button.

- If you decide to leave the **Update Account Information** screen before submitting your edits, click the [Return to Main Menu] button at the top of the screen.

3.1 Changing Passwords

To change your password, click the [Change Password] button on the **Update My Information** screen. The **Change Your Password** screen will appear, as seen in Picture 3.3.
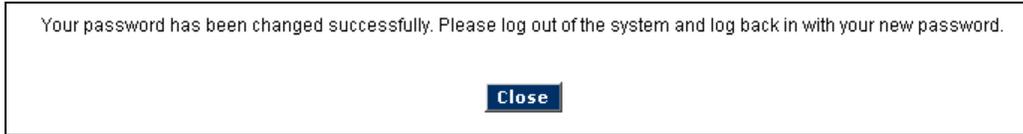
Change Your Password

Enter your old password and a new password. Confirm your new password to make sure you entered it correctly. Passwords are case-sensitive and must be at least 8 characters long and contain 1 numeric character.

User Name laura.smith
Old Password:
New Password:
Confirm New Password:

OK Cancel

Picture 3.3: Change Your Password Screen

To change your password:

- Enter your old password in the **Old Password** text box, and then enter a new password in the **New Password** text box. Passwords are case sensitive and must be at least 8 characters long and contain 1 numeric character. Initial passwords are generated with special characters (#, !, $, etc.) to provide an extra level of security, but they are not required when changing the password.

- Enter your new password again in the **Confirm New Password** text box.

- Click the [OK] button when you are finished. A message indicating that your password has been successfully changed will appear, as seen in Picture 3.4. Click the [Close] button to continue.

Your password has been changed successfully. Please log out of the system and log back in with your new password.

Close

Picture 3.4: Password Change Verification Message

- If you decide to leave the **Change Your Password** screen without submitting a new password, click the [Cancel] button.

4. Transferring Account Responsibilities

To transfer your account responsibilities, click the [Transfer My Responsibilities] button on the main menu of the CSAT Account Management application. The **Account Role Checklist** screen will appear, as seen in Picture 4.1, and it will display the responsibilities associated with your account: Submitter, Preparer, Authorizer, or Reviewer. **NOTE:** To transfer an account role, your must be logged in to CSAT with the user name of the account *from which responsibilities will be transferred*.
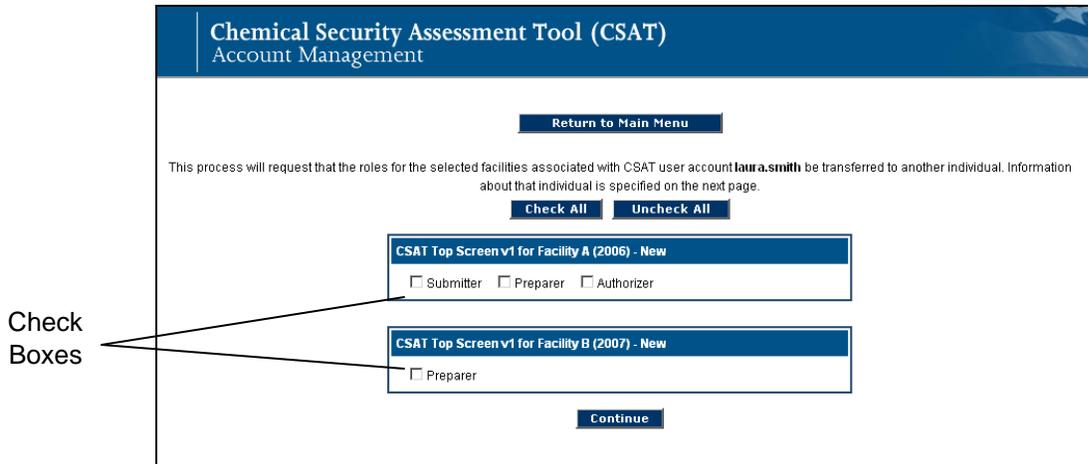
Picture 4.1: Account Role Checklist Screen

To transfer a role:

- Select the check box next to the role for a specific facility to transfer. Only the roles that you select will be transferred; the unselected roles will remain with you.

- Use the [Check All] button to select all of the roles and facilities listed on the screen.

- Use the [Uncheck All] button to clear all of the selections you have made.

- When you are finished, click the [Continue] button at the bottom of the screen. See Section 4.1 for the next steps.

- If you would like to leave the **Account Role Checklist** screen without transferring any roles, click the [Return to Main Menu] button at the top of the screen.

NOTE: The actual transfer of roles will not take place until the CSAT Help Desk verifies the transfer. If a role's transfer has been requested but not yet verified, the role will be shaded and inaccessible on the **Account Role Checklist** screen. When the role transfer is verified by the Help Desk, the role will no longer appear on your **Account Role Checklist** screen.

4.1   Selecting Users for Roles

After you click the [Continue] button on the **Account Role Checklist** screen, the **Role Transfer Selection** screen will appear (see Picture 4.2).


Picture 4.2: Role Transfer Selection Screen

To transfer your role to another user:

- Click the [Transfer to Existing CSAT User] button if the person who is accepting the responsibilities is already registered with CSAT. See Section 4.1.1 for more details.

- Click the [Transfer to a New CSAT User] button if the person who is accepting the responsibilities has not registered with CSAT. See Section 4.1.2 for more details.

- If you would like to leave the **Role Transfer Selection** screen without transferring any roles, click the [Return to Main Menu] button at the top of the screen.

4.1.1 Transferring Roles to Existing CSAT Users

After you click the [Transfer to Existing CSAT User] button on the **Role Transfer Selection** screen, the **Account Transfer** screen will appear (see Picture 4.3).
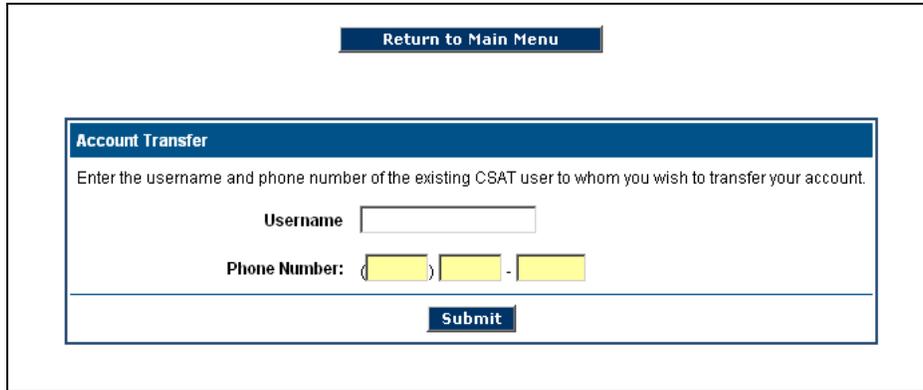
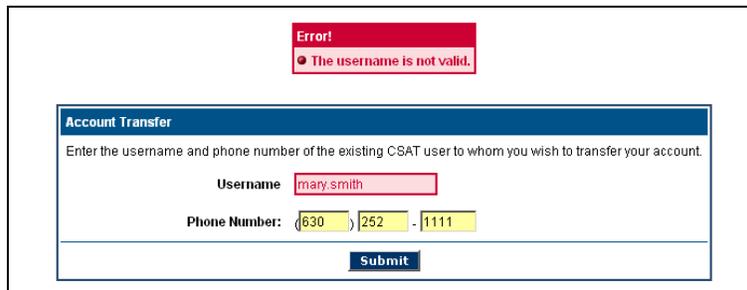**Picture 4.3: Account Transfer Screen**

To complete the account transfer process to an existing CSAT user:

- Enter the CSAT account user name of the existing user who will be taking over the role in the **Username** text box. The user name must match the one that the CSAT system has stored for the user's account.

- Enter the user's phone number in the **Phone Number** text box. The phone number must match the number that the system currently has stored for this user.

- When you are finished, click the [Submit] button. The information that you submit will be compared to existing CSAT users to find a match to begin the transfer process.

  o If a match is made, the message appears as shown in Picture 4.4. After the CSAT Help Desk verifies the transfer, a notification of the transfer will be sent via e-mail to the user to whom you have transferred the account.

Your request for an account transfer has been sent to the Help Desk. You will be contacted with the decision of your request shortly.

Picture 4.4: Account Transfer Request Delivery Verification Message

o If a match is not made to an existing CSAT user, an error message will appear as shown in Picture 4.5. Re-enter user information in the text boxes that are highlighted in red and click the [Submit] button again. If the error message appears again, click the [Return to Main Menu button to begin the transfer process again with either a different registered CSAT user or a new CSAT user. *NOTE:* The user that you selected may be registered with CSAT but has not yet been verified. In that case, wait for confirmation from the Help Desk that the user has been verified and then complete the transfer.

Picture 4.5: Account Transfer Request Error Message

• If you would like to leave the **Account Transfer** screen without transferring your account to a new user, click the [Return to Main Menu] button at the top of the screen.

4.1.2 Transferring Roles to New CSAT Users

After you click the [Transfer to New CSAT User] button on the **Role Transfer Selection** screen, the **New User Information** screen will appear (see Picture 4.6).


Picture 4.6: New User Information Screen

To complete the **New User Information** screen:

- Enter the following information about the new user in the designated text boxes:
    - First name
    - Middle initial (optional)
    - Last name
    - Organization
    - Mailing address
    - City
    - State
    - Zip code
    - Phone number
    - E-mail address.

- Answer the following questions about the new user by using the option buttons provided:
    - Is the individual a U.S. Citizen?
    - Is the individual an Officer of the Corporation or designated by an Officer of the Corporation?
    - Is the individual domiciled in the U.S.?

    You might not see some of these questions, since only the appropriate questions will appear on the screen depending on the role that you are transferring.

- If you would like to leave the **New User Information** screen without transferring your account to a new user, click the [Return to Main Menu] button at the top of the screen.

- After you finish entering information about the new user, click the [Complete] button at the bottom of the screen. The **PDF Download** screen will appear (see Picture 4.7), where you will click the [Download PDF Form] to view the User Change Request PDF form that is created based on the information you entered.
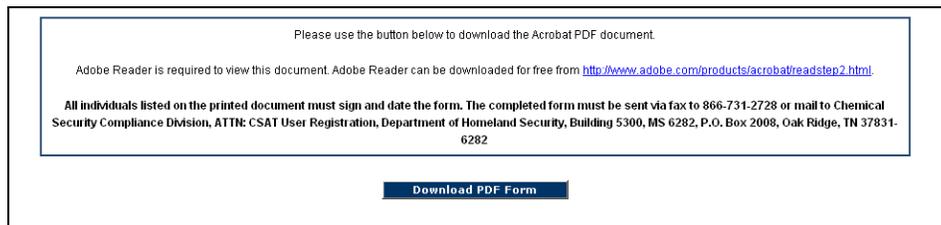
Picture 4.7: PDF Download Screen

- The User Change Request PDF form will appear in a new window. Print the form using menu commands provided in the window.

- The User Change Request PDF form must be signed and dated by the new user, the old user, and the Authorizer. If the role being transferred is the Authorizer role, the old Authorizer must sign in the Authorizer box. Complete, sign, and date the form, and make a copy for your records.

- Send the User Change Request PDF form via fax to 866-731-2728, or via mail to:

    Chemical Security Compliance Division

    ATTN: CSAT User Registration

    Department of Homeland Security

    Building 5300, MS 6282

    P.O. Box 2008

    Oak Ridge, TN 37831-6282