Chemical Security Assessment Tool (CSAT) Portal User Manual

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Homeland Security

Table of Contents

1. Overview 1
2. CSAT User Roles 1
3. Authorizer and Facility Registration 2
3.1 Authorizer Registration 3
3.1.1 Authorizer Information 4
3.1.2 Facility Name and Address 5
3.1.3 Facility Location 7
3.2 User Registration with a Challenge Code 17
3.2.1 Existing CSAT User 18
4. Accessing the CSAT Portal 20
4.1 CVI Authorization 21
4.2 Select Authorizer 22
5. Navigating the CSAT Portal 24
6. Home Tab 25
7. My Facilities Tab 28
7.1 Facility Search 29
7.2 Add Facility 30
7.2.1 Facility Location 30
8. Facility Details Tab 35
8.1 Facility Details 39
8.1.1 Map Features Overview 40
8.1.2 Update Facility Details 41
8.2 Surveys in Progress 42
8.2.1 Start a Survey 42
8.2.2 Return to the Survey 44
8.2.3 Update Survey 45
8.2.4 Letters Awaiting Acknowledgment 49
8.2.5 Submitted Surveys and Acknowledgement Letters 50
8.2.6 Search Feature 51
8.3 Facility Users 53
8.3.1 Change Submitter 54
8.3.2 Add / Delete Preparers and/or Reviewers 57
9. User Management Tab 62
9.1 Add Users 62

9.2 Pending Users 63
9.3 Search Users 64
9.4 Users 65
9.4.1 Administrator 65
9.4.2 Available Actions 66
10. Manage my Account 68
10.1 Edit my information 69
10.2 Change Password 70
10.3 Transfer Authorizer Role 71
10.4 Change Current Authorizer 77
11. Personnel Surety Program 79
12. Help 80
12.1 Contacting the CSAT Help Desk 80
13. Addendum A – Ownership and Facility Type Instructions 81
14. Addendum B – Personnel Information Instructions 83
15. Acronym List 84

Tables and Figures

Table 1: CSAT User Role Descriptions 1
Table 2: Geospatial Tool Buttons and Features 9
Table 3: Geospatial Tool Buttons and Features 31
Table 4: Facility Details Map Features 40
Table 5: Search Buttons and Features Overview 52
Table 6: Add/Delete Reviewers or Prepares Buttons and Features Overview 59

Figure 1: How to Register on the CSAT Website 2
Figure 2: Answer the Challenge Text Question and Click Continue for the CSAT Registration Process 3
Figure 3: Enter Your Information to Continue with the CSAT Registration Process (New Authorizer and Facility) 4
Figure 4: Sample Error Indicators and Field Validation 4
Figure 5: Correct Your Zip Code or Check the Box to Bypass Validation to Continue with CSAT Registration 5
Figure 6: Enter the Notification Code to Continue with Facility Registration 5
Figure 7: Enter the Facility Name and Address to Continue with the CSAT Registration 6
Figure 8: CSAT Registration Geospatial Tool 7
Figure 9: Drag the X to Place the X to the Center Location of Your Facility 10
Figure 10: Click the Next button to Save the Facility Location During CSAT Registration 11
Figure 11: Click the Accessibility Button to Manually Place the X for Your Facility's Center Location 11
Figure 12: Click the Open Text Box to Enter Latitude and Longitude to Mark Your Facility's Center 12
Figure 13: Complete the Ownership and Facility Type Section to Continue with CSAT Registration 13
Figure 14: Complete the Personnel Information Section to Continue with CSAT Registration 14
Figure 15: Summary Page for CSAT Registration 15
Figure 16: Click the Submit to DHS Button to Complete CSAT Registration 16
Figure 17: Click Yes to re-confirm your CSAT registration submission 16
Figure 18: Click the Download PDF Button to Retain a Copy of Your CSAT Registration 17
Figure 19: Enter the Challenge Code to Continue with CSAT Registration 17
Figure 20: Enter CSAT Login Information For an Existing CSAT User 18
Figure 21: Enter Your Information and Click Submit to Finish the User Registration Process 19
Figure 22: Submission Message for Successfully Completing CSAT Registration 19
Figure 23: Enter Your CSAT Credentials and Click [Sign In] to Access the CSAT Portal 20
Figure 24: Insert Your CVI Credentials and Click Submit Authorization to Enable Your Account 21
Figure 25: Message Display Prompting a User to Select an Authorizer 22
Figure 26: Select the Appropriate Authorizer Role to Continue to the CSAT Portal 22
Figure 27: Click the Submit button to continue to the CSAT Portal 23
Figure 28: Overview of the CSAT Portal Header and Footer 24
Figure 29: CSAT Home Tab Overview 26
Figure 30: Click the Letter Link to Acknowledge the Letter Sent by DHS 27
Figure 31: Check the Acknowledgement Statement and Click Submit to Accept the DHS Letter 27
Figure 32: My Facilities Tab Page Overview 28
Figure 33: Enter One or Many Search Criterial to Conduct a Search of Your Facilities 29
Figure 34: Search Results Displayed in My Facilities List 29
Figure 35: Click the Add Facility Button to Register a New Facility 30
Figure 36: CSAT Portal Geospatial Tool Overview 30
Figure 37: Drag the X to Place it to the Center Location of Your Facility. 32
Figure 38: Click the Lock X Button to Save Your Facility Location 33
Figure 39: Click the [Edit X] Button on the Top Right Corner of the Geospatial Tool after Locking the X 34
Figure 40: Pending Facility Overview 34
Figure 41: My Facility Details Tab Location Overview 35
Figure 42: Click the Facility ID Found in the My Facilities List to Access its Details Page. 35
Figure 43: Click Any Facility Name in Any Pending Action List to Access the Facility Details Page 36
Figure 44: Use the Quick Search to Access a Facility Details Page 37
Figure 45: Facility Details Sample Page Overview 38

Figure 46: Sample Summary of the Facility Detail Column 39
Figure 47: Facility Details Page - Map Features Overview 40
Figure 48: Click the View More/Edit Button to Access More Facility Details or Update Information 41
Figure 49: Representative Sample of the Facility Details Page (Not All Fields are Depicted) 41
Figure 50: Representative Sample of the Surveys in Progress Column 42
Figure 51: Click Start Survey Button to Begin a CSAT Survey 42
Figure 52: Click Continue to Start a CSAT Survey (Top-Screen Survey Depicted) 43
Figure 53: Click Exit to return to the CSAT Portal 43
Figure 54: Click Leave Page to Return to the CSAT Portal 44
Figure 55: Click Return to Survey to Complete a CSAT Survey with an In Progress Status 44
Figure 56: Click the Update Top-Screen to Edit the Top-Screen Survey 45
Figure 57: Click Submit to Continue to the CSAT Survey Application and Update Your Survey 45
Figure 58: Click Start Survey to Begin an Update to a Survey or Click Cancel Update to Cancel the Action 46
Figure 59: Click Submit to Complete the Update Survey Cancellation 46
Figure 60: Click Request Extension to Extend a Due Date for a CSAT Survey 47
Figure 61: Provide the Necessary Information to Complete the Request for Extension Form 47
Figure 62: Click Submit to Complete the Request for Extension 48
Figure 63: Pending Extension Requests can be Reviewed in the Home Page and the Facility Details Page 48
Figure 64: Click the Letter Name Link to Acknowledge the Letter Sent by DHS 49
Figure 65: Check the Acknowledgement Statement and Click Submit Acknowledgement to Accept the DHS Letter 49
Figure 66: Acknowledged Letter Appears in the Submitted Surveys and Acknowledgment Letters Column 50
Figure 67: Search Surveys and Letters Overview 50
Figure 68: Search Submitted Surveys and Acknowledged Letters Features 51
Figure 69: Search Parameters and Filter Results Overview 51
Figure 70: Facility Users Column Provides a List of All Users and Roles with Access to Facility Information 53
Figure 71: Click the Change Button to Edit 54
Figure 72: Use the Drop Down Menu to Choose a Submitter 55
Figure 73: Click Save to Choose a Different Submitter for a Facility 56
Figure 74: Click the Add/Delete Button to Manage the Facility's Preparers and Reviewers 57
Figure 75: Use the Drop Down Menu to Choose a Submitter 58
Figure 76: Choose Preparers Sample List 60
Figure 77: Click Save to Add or Delete Users from a Reviewer or Preparer Role 61
Figure 78: New Users Appear in the Facility Users Column 61
Figure 79: Click Add User to Invite a User to Begin CSAT Registration for a New or Existing Account 62
Figure 80: Pending Users Sample Column 63
Figure 81: Confirm Delete Removes the Pending User 63
Figure 82: Overview of the Edit/Delete Users Web Form 64
Figure 83: Search Users Features Overview 64
Figure 84: Users List Features and Buttons Overview 65
Figure 85: Administrator Rights are Managed by Checking or Unchecking the User Box 65
Figure 86: Use the Reset Password Button to Send an Automated New Password to a User 66
Figure 87: Click the Reset Password to Unlock a User's Account 66
Figure 88: Click the Enable Button to Restore a Disabled CSAT User Account 67
Figure 89: Click on Your User Name to Access Your Account 68
Figure 90: My Account Overview 68
Figure 91: Click Save to Complete Your Account Information Changes 69
Figure 92: Enter Your Current, New, and Confirmed Password for the Change Password to be Enabled 70
Figure 93: Click Transfer Authorizer Role to Begin the Transfer of Facilities to Another User 71
Figure 94: Sample of Required Fields in the Transfer Authorizer Request Form 72
Figure 95: Existing User Roles Transferred Using the Authorizer Role Transfer Feature 72
Figure 96: Select Yes or No to Transfer All Facilities (For an Authorizer for Multiple Facilities) 73
Figure 97: Check Box for the Facilities One at a Time Feature 73
Figure 98: Use the Filter Options to Refine the Facility List 74
Figure 99: Click Transfer Role to Complete the Authorizer Transfer Request 74
Figure 100: Confirm Transfer to Complete the Authorizer Transfer Role 74

Figure 101: Completed Transfer Authorizer Request Appears Pending until the New Authorizer Accepts the Request 75
Figure 102: Edit Pending Transfers Web Form 76
Figure 103: Confirm Delete Stops the Authorizer Transfer Role Process 77
Figure 104: Click the Current Authorizer Link to Change Authorizer [Only for Users Associated with Multiple Authorizers] 77
Figure 105: Select the Authorizer Name and Click Submit to Change the Authorizer Purview 78
Figure 106: Personnel Surety Program Tab Navigates Users with Access to the Application 79
Figure 107: Help Tab Overview 80

1. Overview

This document is the user manual for the Chemical Facility Anti-Terrorism Standards (CFATS) Chemical Security Assessment Tool's second major release (CSAT ver. 2.0). CSAT is an information-gathering application developed by the U.S. Department of Homeland Security (DHS) to collect and analyze key data from chemical facilities. This information-gathering activity is pursuant to Title XXI of the Homeland Security Act of 2002 and the associated regulation titled Chemical Facility Anti-Terrorism Standards, 6 CFR Part 27.

This user manual shows you how to register for CSAT and navigate the CSAT Portal. More information about CSAT is available at http://www.dhs.gov/chemicalsecurity.

2. CSAT User Roles

Five CSAT user roles can access the CSAT Portal: Authorizer, Administrator, Submitter, Preparer, and Reviewer. Table 1 below, describes each user role.

CSAT User Role	Description
Authorizer	Can register facilities, invite other users to register with CSAT, and manage users. Can view the surveys and transfer the Authorizer role. Only one Authorizer role is allowed per facility.
Administrator	Can register facilities and manage users. Cannot review any survey information. Multiple Administrators per Authorizer are allowed.
Submitter	Can fill out, edit, and submit the surveys. Only the Submitter role can submit a completed survey to DHS. Only one Submitter is allowed per facility; however, a Submitter can be assigned to multiple facilities.
Preparer	Can fill out or edit the surveys. Cannot submit a completed survey to DHS. Multiple Preparers are allowed per facility.
Reviewer	Can view the surveys (read-only permission). Cannot edit or submit a completed survey to DHS. Multiple Reviewers are allowed per facility.

Table 1: CSAT User Role Descriptions

NOTE See Section 9 for adding/deleting users and user management details.

3. Authorizer and Facility Registration

In order to receive access to CSAT, an Authorizer must first register at https://csat-registration.dhs.gov/.

The registration process allows an Authorizer to register one or more facilities at a time. DHS validates the registration and notifies the user on how to access CSAT. The Authorizer can then invite new or existing CSAT users to gain access to their facility data to complete CFATS requirements.

Click **[register on the CSAT website]** to continue with the CSAT user and facility registration process.

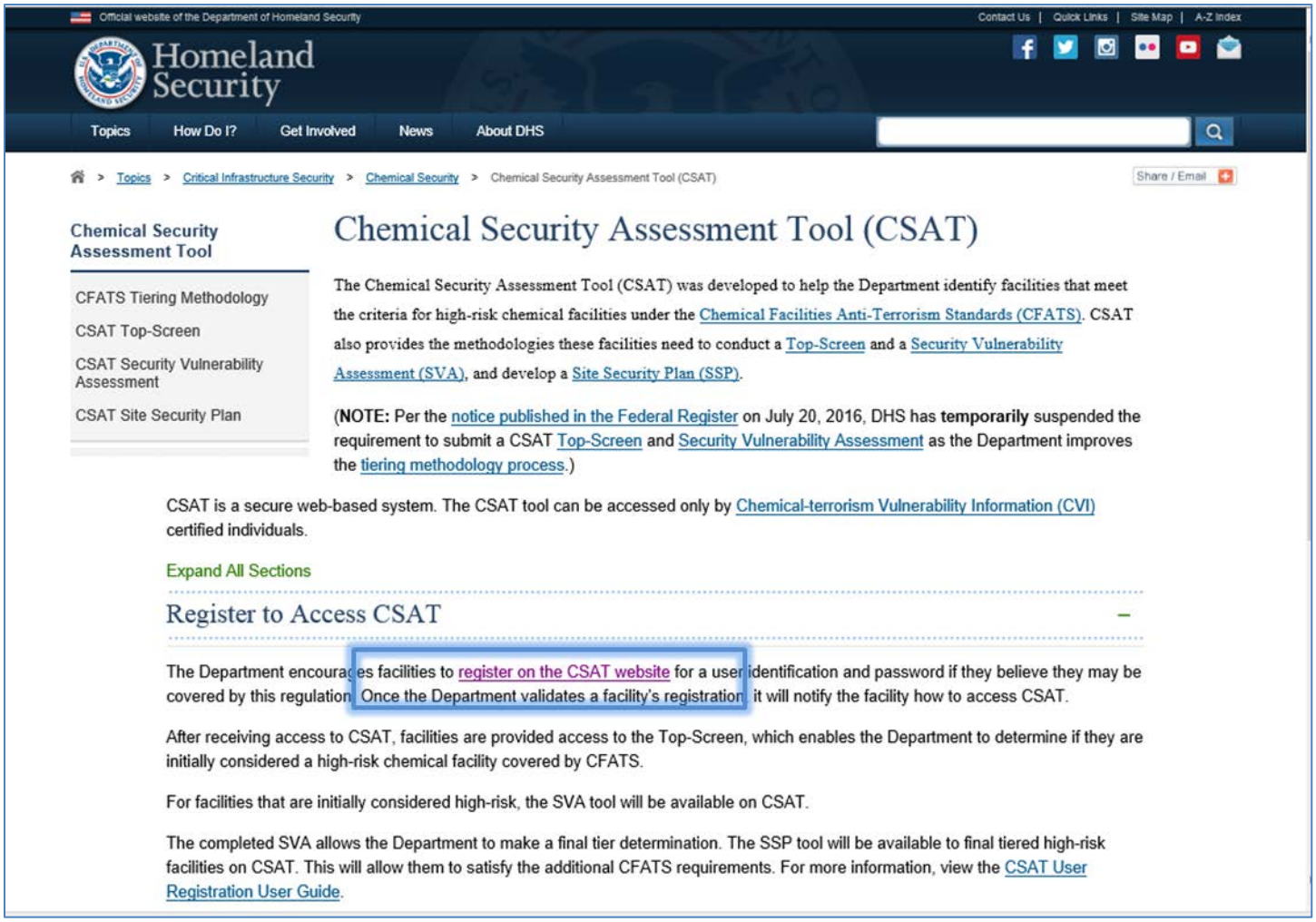


Figure 1: How to Register on the CSAT Website

3.1 Authorizer Registration

Click the **[Continue >>]** button when you have reviewed the Privacy and Paperwork Reduction Act Statement and answered the text challenge question at the bottom of the page.

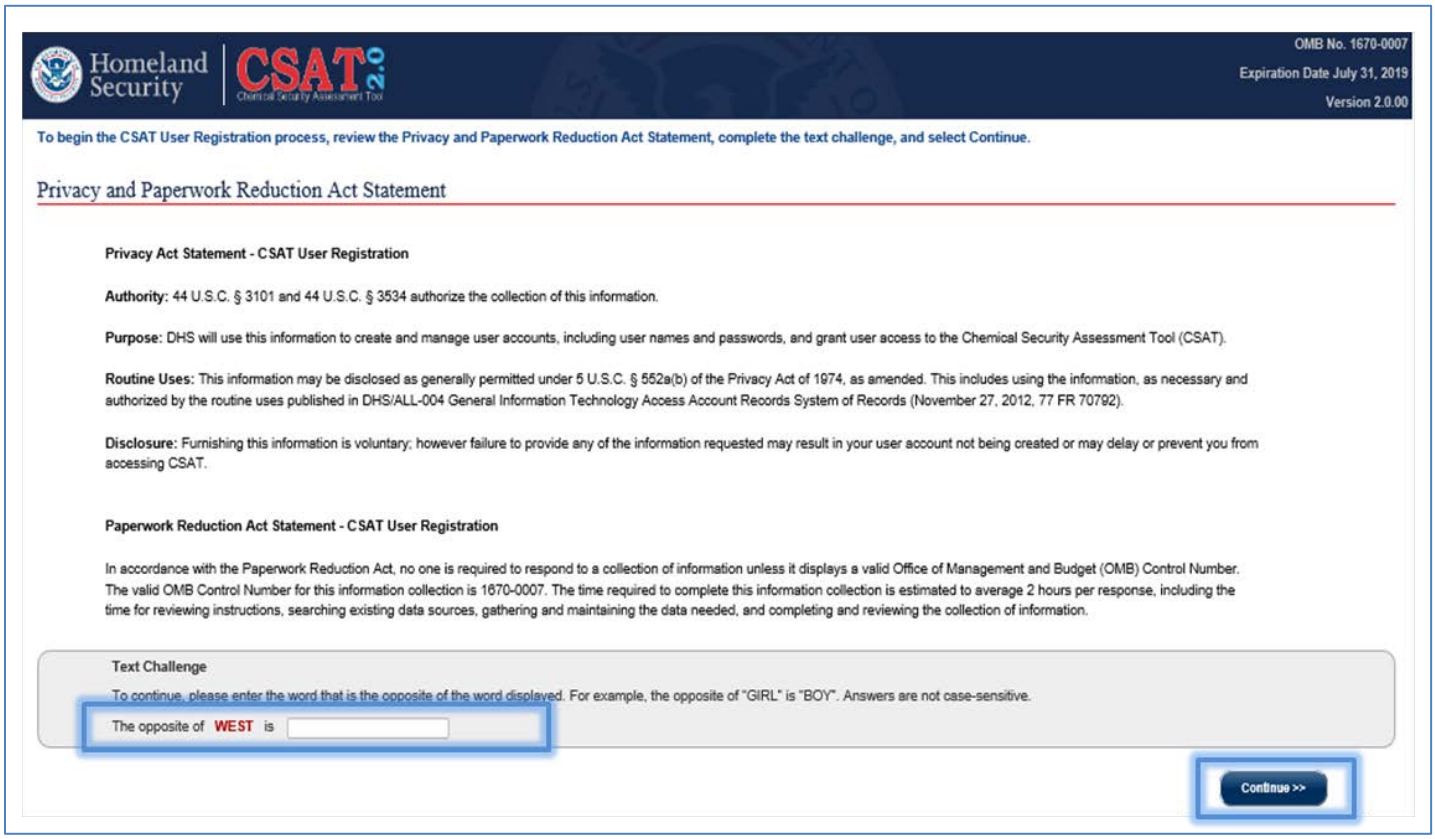


Figure 2: Answer the Challenge Text Question and Click Continue for the CSAT Registration Process

NOTE You must answer all the required fields indicated by a red asterisk in order to continue with each section of the CSAT registration process.

3.1.1 Authorizer Information

Enter your **information** and click the **[Next]** button.

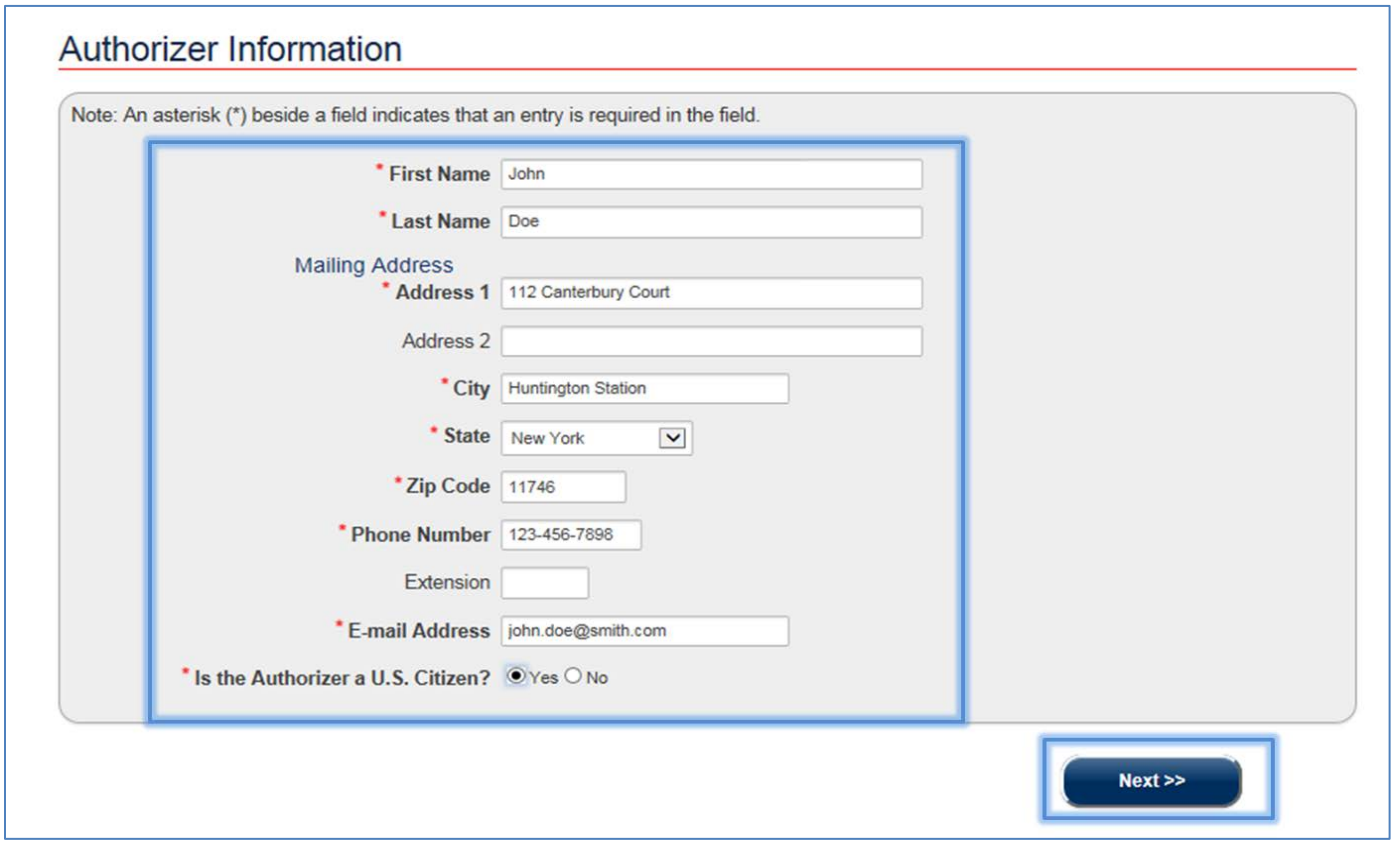


Figure 3: Enter Your Information to Continue with the CSAT Registration Process (New Authorizer and Facility)

The system alerts you when you leave a required field blank or you enter an invalid value for a field.

Figure 4: Sample Error Indicators and Field Validation

To minimize address errors, the system validates your zip code against the address you entered. If it cannot validate your zip code, you will have the option of bypassing the validation. Correct your zip code or check the bypass validation checkbox to continue.

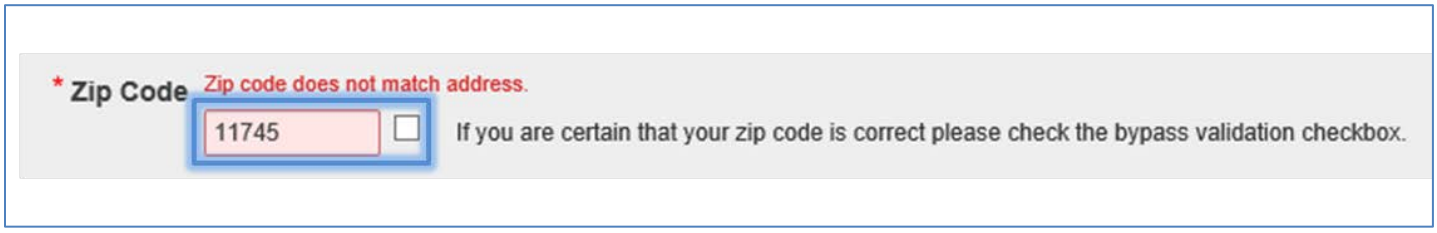


Figure 5: Correct Your Zip Code or Check the Box to Bypass Validation to Continue with CSAT Registration

3.1.2 Facility Name and Address

Select **Yes** if you have received a notification letter from DHS. The notification letter contains a code that you must enter in the Notification Code text box. Select **No** if you did not receive a notification letter.

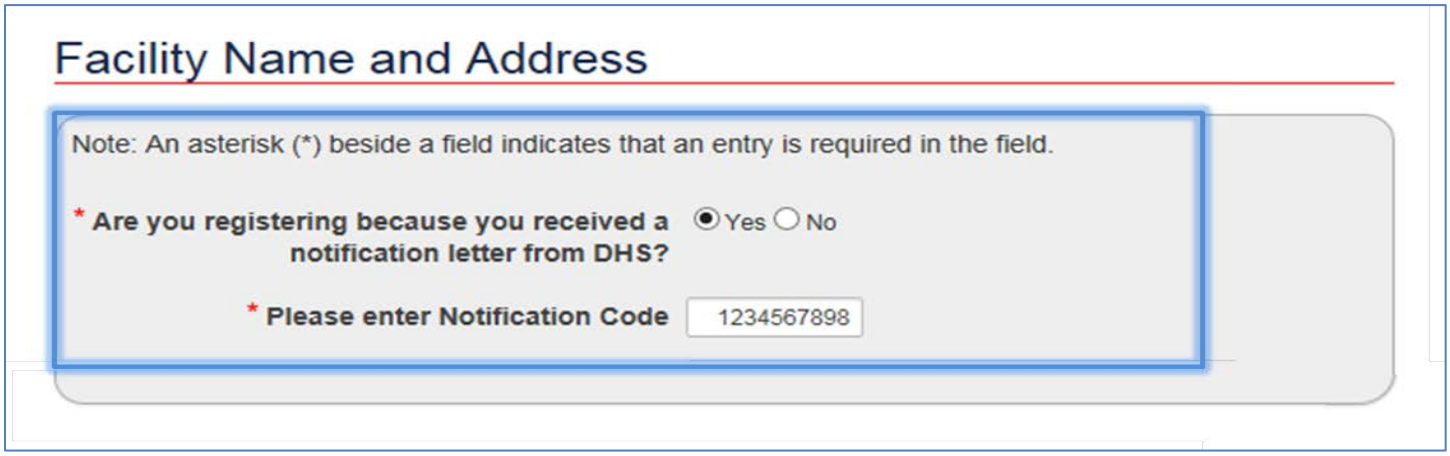


Figure 6: Enter the Notification Code to Continue with Facility Registration

Enter your **facility's name** and **address** and select **[Next]**.

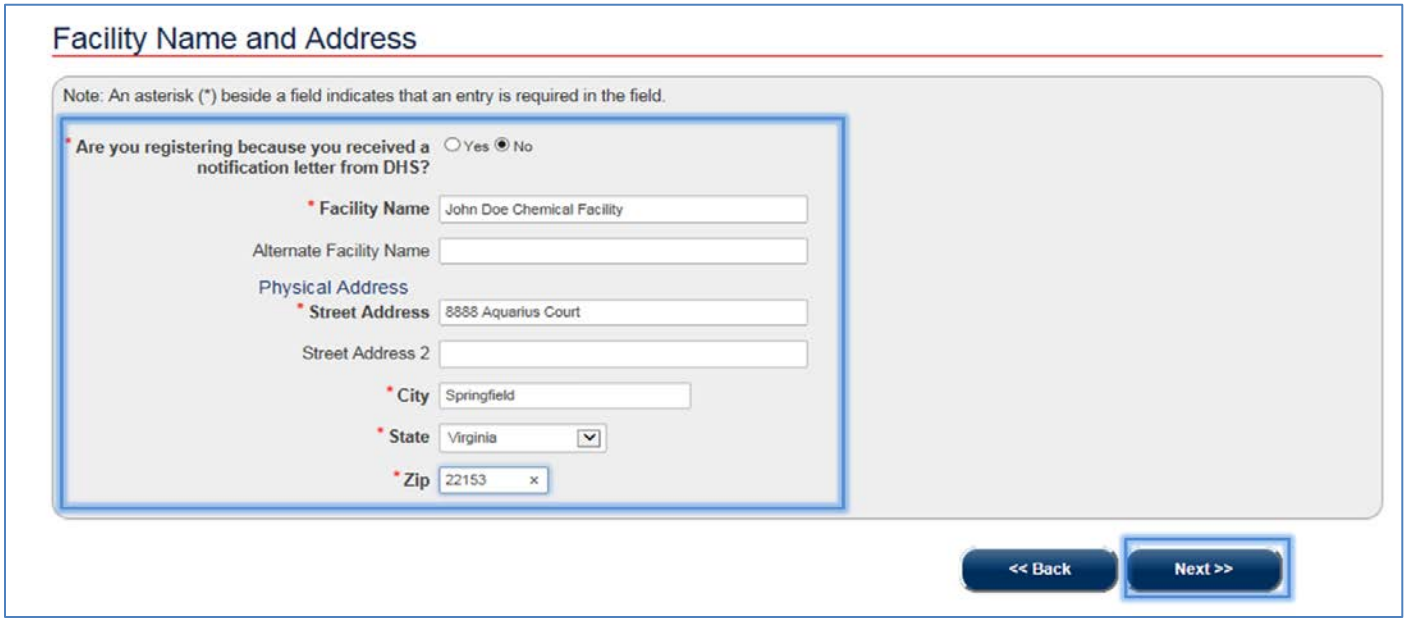


Figure 7: Enter the Facility Name and Address to Continue with the CSAT Registration

The system validates the zip code you entered by using Google map's third party service. In order to continue with the registration, the physical address must be a recognized address within Google maps. This assists with providing your facility's geospatial map location and allows you to complete the next section. If you receive an error, you can select the bypass option; however when the map generates for the Facility Location, it may be different than what you were expecting.

NOTE If you have any trouble validating your physical address, contact the CSAT Help Desk.

3.1.3 Facility Location

In this section of the registration, you are asked to place an X marking the center of your facility. The following sections describe the functions and features of the geospatial tool you use to locate your facility on the map.

Figure 8: CSAT Registration Geospatial Tool

Geospatial tool - Overview

The table below describes the buttons and features found in the geospatial tool.

Button/Feature		Function
	Facility Physical Address Marker	Marks physical address provided in the Facility Name and Address section of the registration process.
	Facility Center Marker	Marks the center of the facility's location. To display, click on map and then drag the X to the center of your facility.

Button/Feature		Function
Satellite	Satellite	Displays a satellite image of the facility location without city names and major highways. This is the default view.
Satellite ☑ Labels	Labels	Option in the Satellite map view that adds labels of major highways, streets and buildings on the map.
Map	Map	This view is similar to a street map. The background is colored gray; small roads are white, larger roads are yellow, and major highways and interstates are orange.
Map ☑ Terrain	Terrain	Option in the Map view. This button highlights differences in terrain. It can be used to determine whether an area is flat or rocky.
	Pointing Hand Vector	Appears after you hover on the X. Click and hold down the mouse button to move to a different location on the map.
	Open Hand Vector	This icon is displayed when no action is performed on the map.
	Closed Hand Vector	Appears after you click anywhere on the map or on the X. Left click and hold the mouse to move the map or X in any direction desired (pan movement). NOTE: When you let go of your mouse button the hand vector returns to the pointing or open-hand vector. See above.

Button/Feature		Function
	Center Map	Centers the map view around the around the facility physical address marker or on the facility center X, if the X already has been placed on the map.
	Zoom In & Out	You can zoom in by clicking on the plus sign and zoom out by clicking on the minus sign.
	Accessibility Button	Allows you to enter the coordinates for manually adding or editing your facility location.

Table 2: Geospatial Tool Buttons and Features

Click on the map to place an X on the map. Once you place the X, hover the mouse over the X. When the open-hand vector changes to the **pointing** icon, you can drag the X to the correct location.

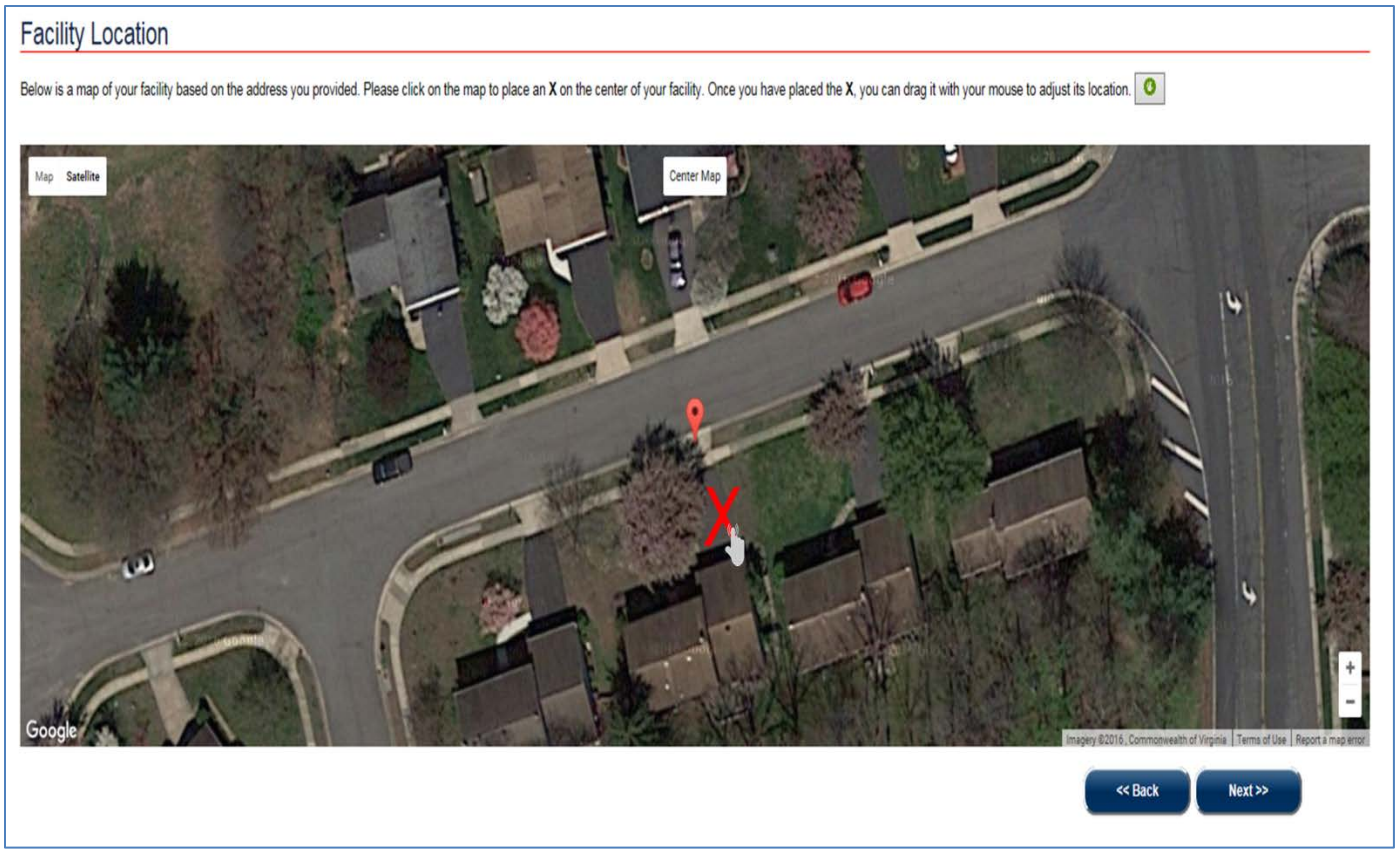


Figure 9: Drag the X to Place the X to the Center Location of Your Facility

NOTE Prior to placing the X, zoom in the map to get a better view of your facility's center location.

Click the **[Back]** button to return to the Facility Name and Address section if you wish to correct the facility's information. Click the **[Next]** button to save the facility's location.

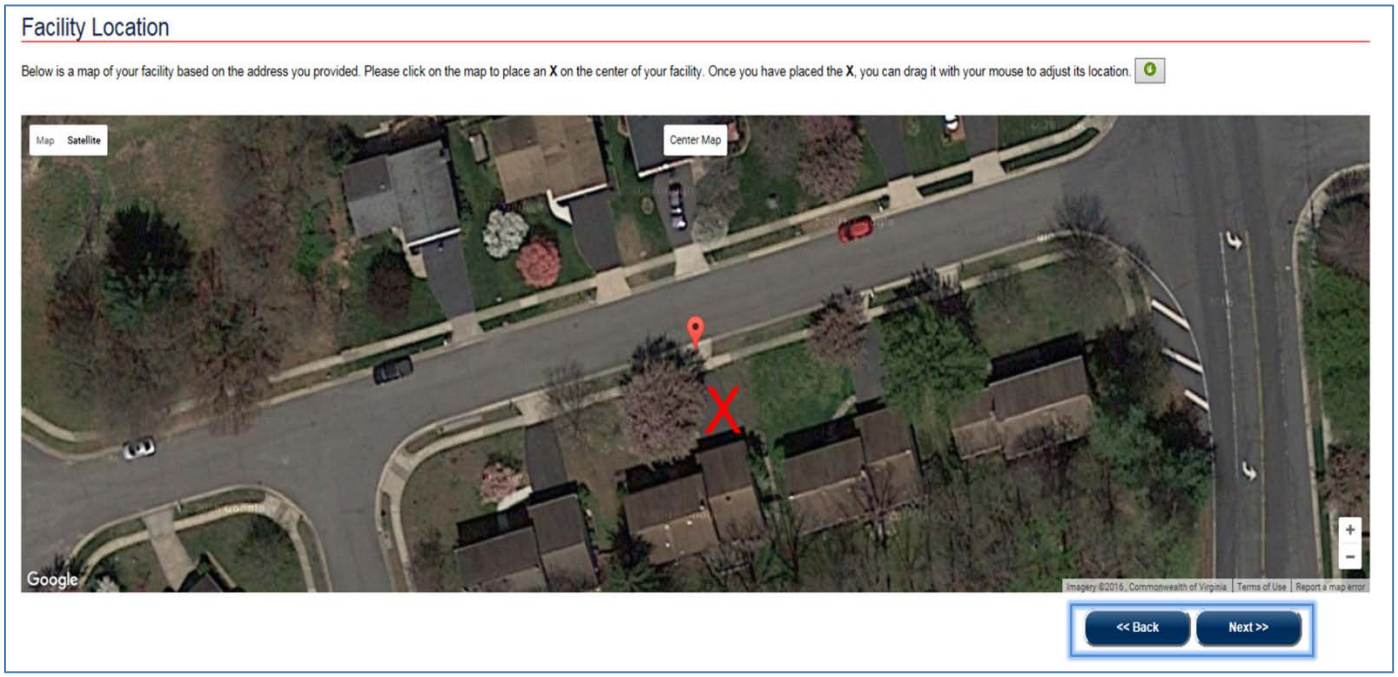


Figure 10: Click the Next button to Save the Facility Location During CSAT Registration

Accessibility Button

This option is designed for individuals who are not able to place the X using the mapping feature. If you can use the mapping feature, it is recommended that you use the map feature instead.

Click the **[Accessibility]** button found on the top right corner of the geospatial tool.

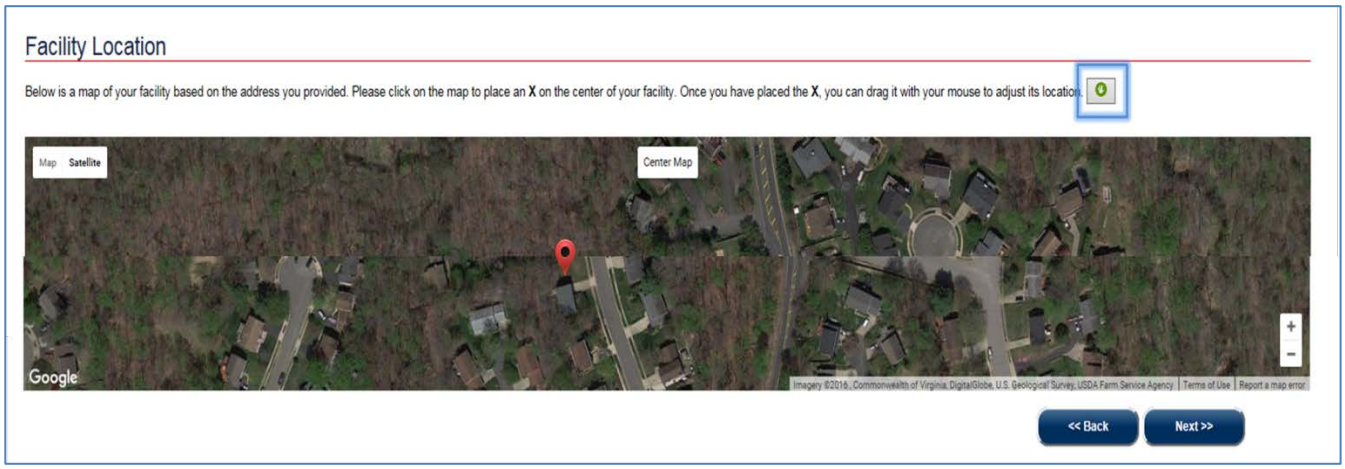


Figure 11: Click the Accessibility Button to Manually Place the X for Your Facility's Center Location

Click on the text area to enter the **Latitude** and **Longitude** coordinates of your facility's center.

Click the **[Cancel]** button to return back to the geospatial tool. Please note, canceling will not save any changes you may have made.

Click the **[Save]** button to save your answer.

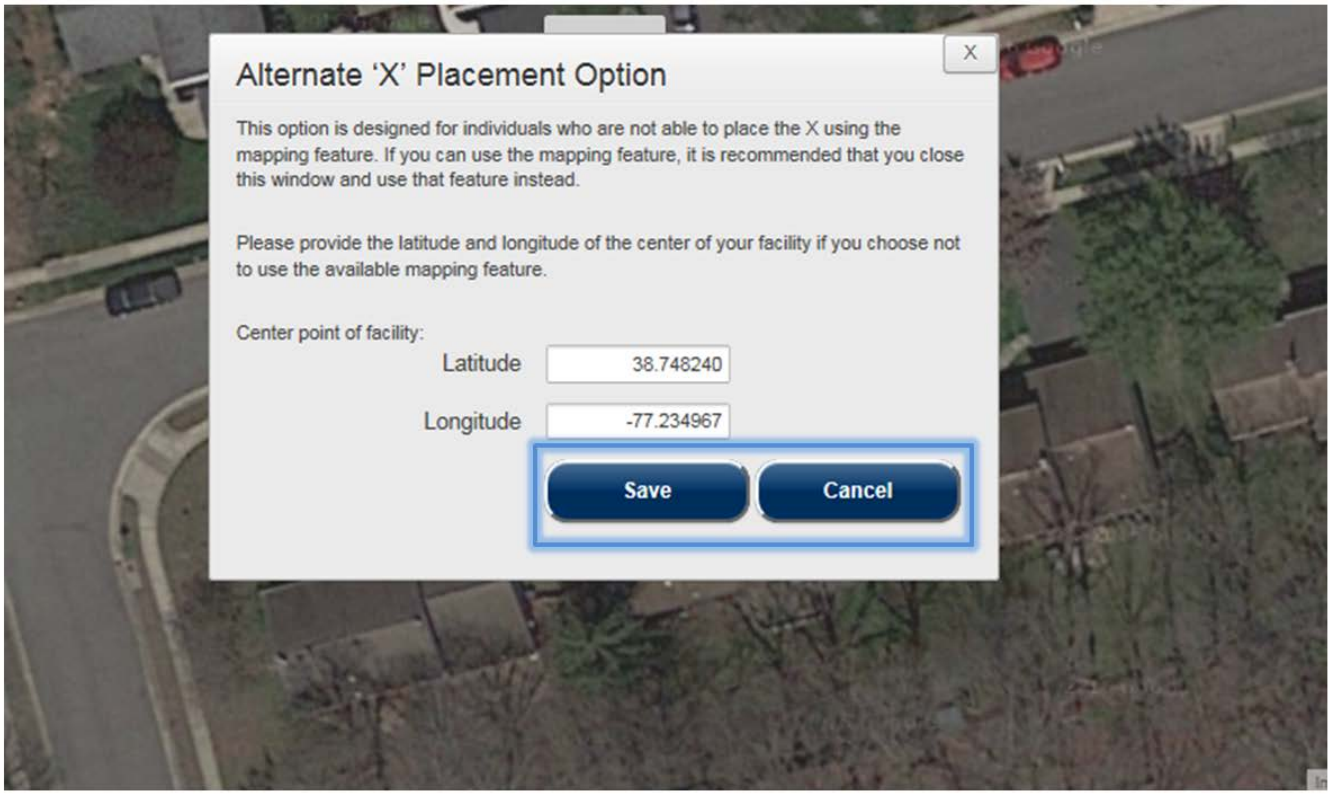


Figure 12: Click the Open Text Box to Enter Latitude and Longitude to Mark Your Facility's Center

NOTE The prepopulated coordinates are the physical address of your facility's information that were provided in the previous section of the registration [Facility Name and Address]. If you already placed an X on the map, the coordinates shown are for the center location.

Ownership and Facility Type

In this section, you describe your facility's owner, operator, and industry classification. See Addendum A for more details regarding each field of this section.

Click the **[Back]** button to return to the Facility Location section if you wish to correct the facility's center.

Click the **[Next]** button to save your answers and continue with the CSAT registration process.

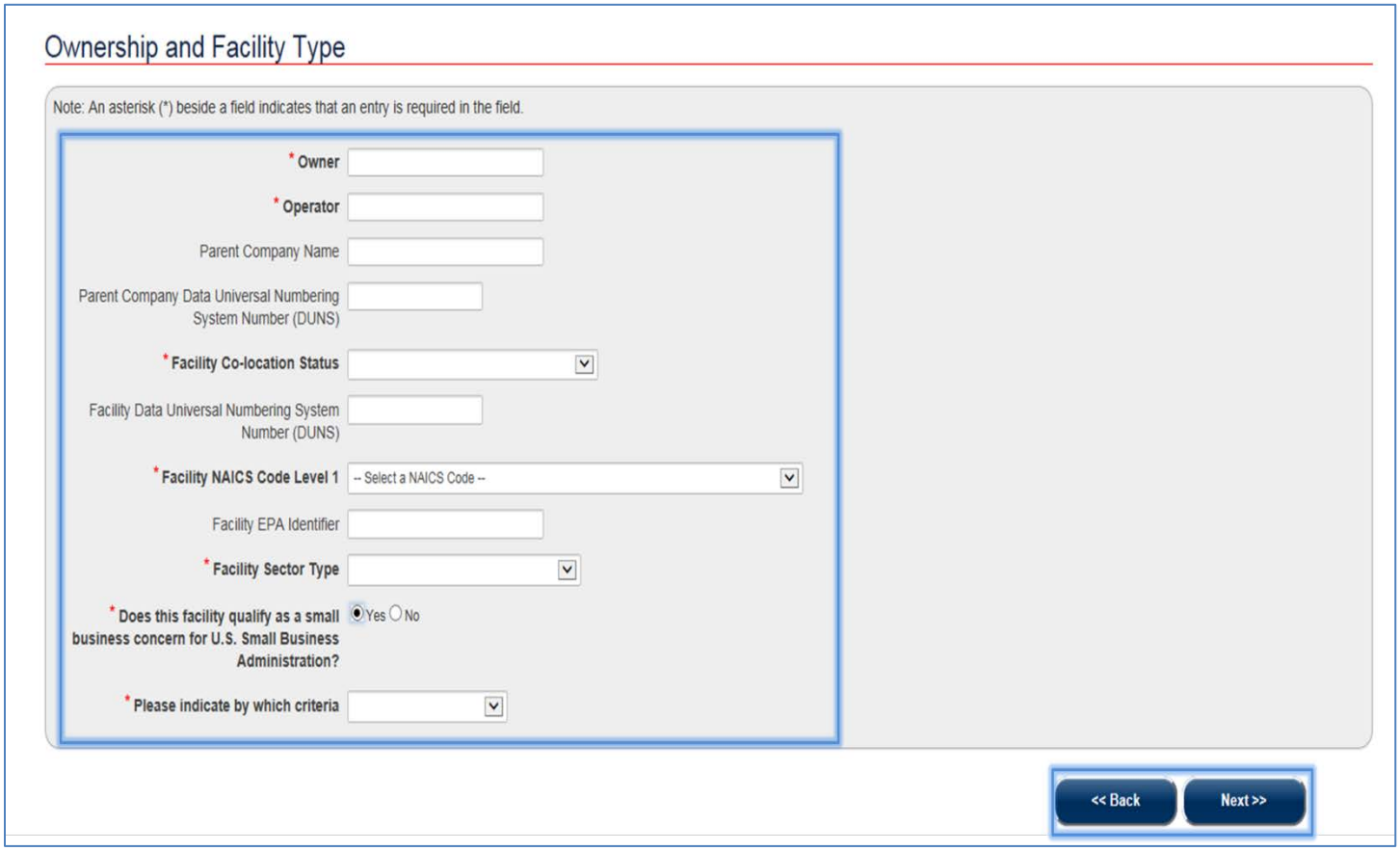


Figure 13: Complete the Ownership and Facility Type Section to Continue with CSAT Registration

Personnel Information

In this section, you provide information about your facility's personnel and its security officer(s) contact information. See Addendum B for more details regarding each field of this section.

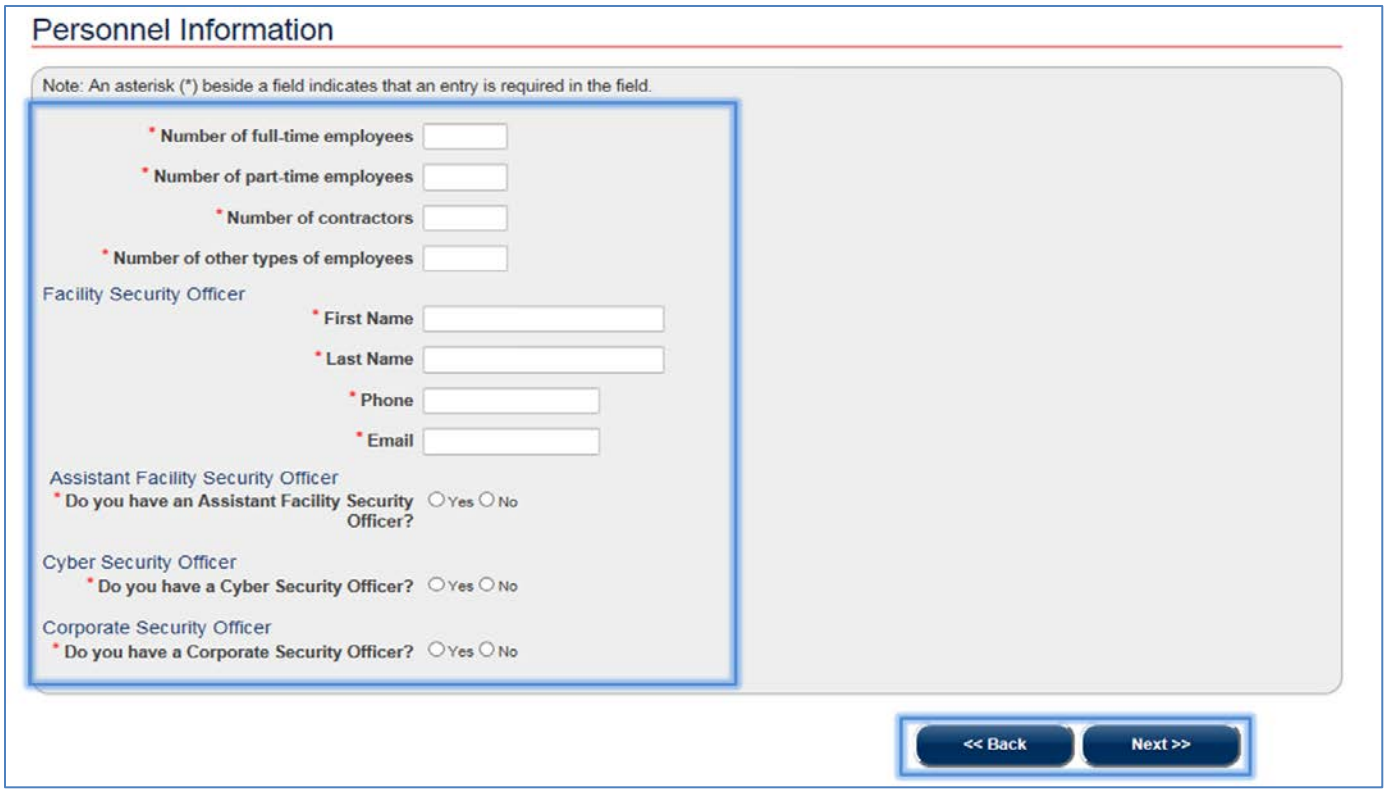
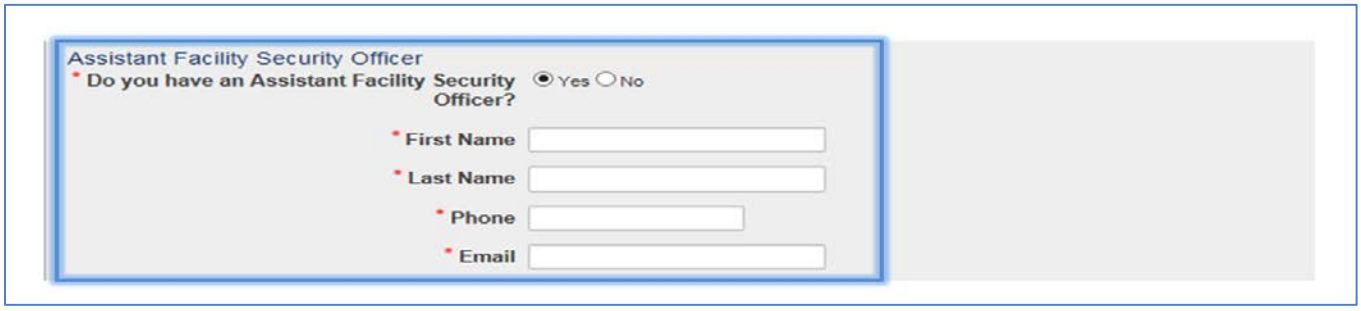


Figure 14: Complete the Personnel Information Section to Continue with CSAT Registration

If you answer **Yes** for any additional types of security officers, you must provide the requested contact information.



Click the **[Back]** button to return to the Ownership and Facility section if you wish to correct any of your previous entries.

Click the **[Next]** button to save your answers and continue with the CSAT registration process.

Add More Facilities

In this section, you review a summary of the information you have entered. Select **Yes** if you want to add another facility during this registration and then follow the instructions above to register an additional facility. Otherwise, select **No.**

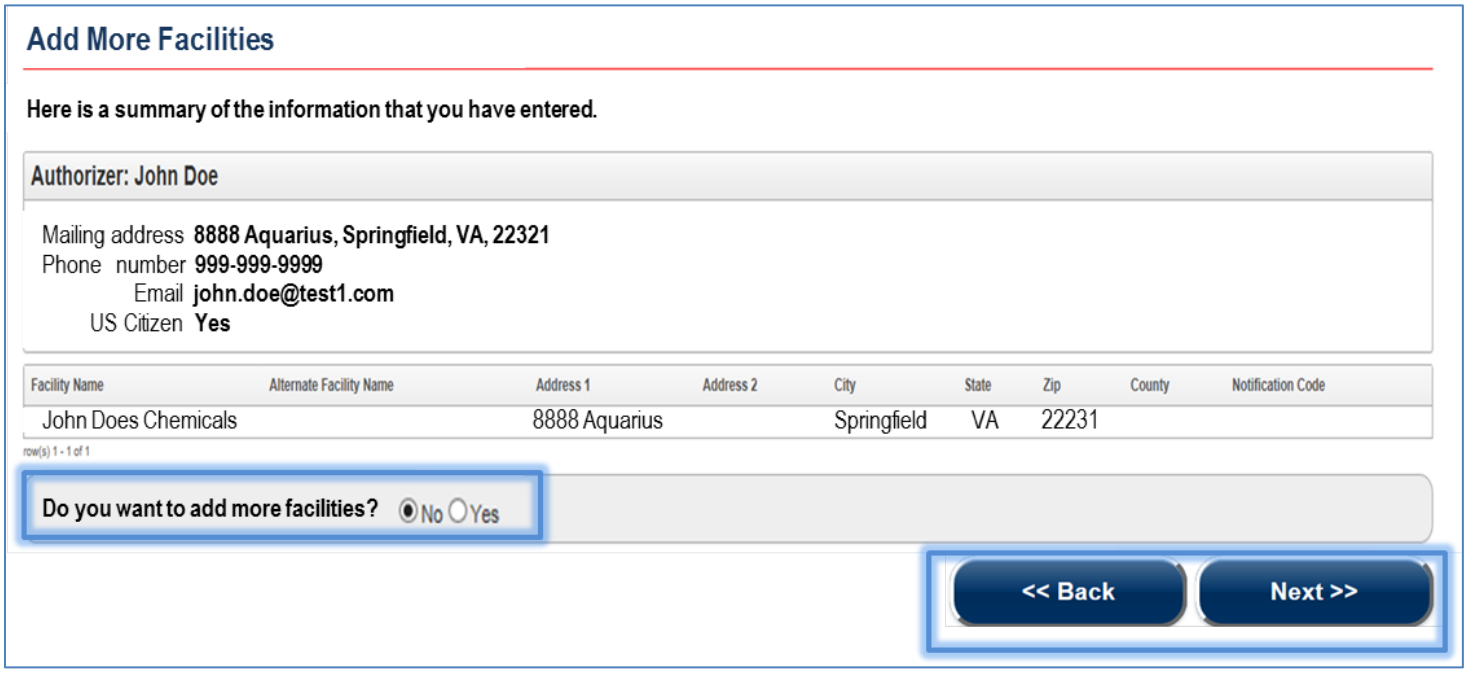


Figure 15: Summary Page for CSAT Registration

NOTE If you have a considerable number of facilities and would prefer to register them in bulk, please complete the registration for only one facility. Contact the CSAT Help Desk who can assist you in registering the rest of your facilities.

NOTE Every time you add a new facility, you are able to review your answers before you submit your registration.

Click the **[Back]** button to return to the Personnel Information or other sections of your registration if you wish to correct any of your previous entries.

Click the **[Next]** button to save your answers and continue with the CSAT registration process.

Submit to DHS

This is the final step of the CSAT registration process.

Click the **[Submit to DHS]** button to save your answers and complete the CSAT registration process.

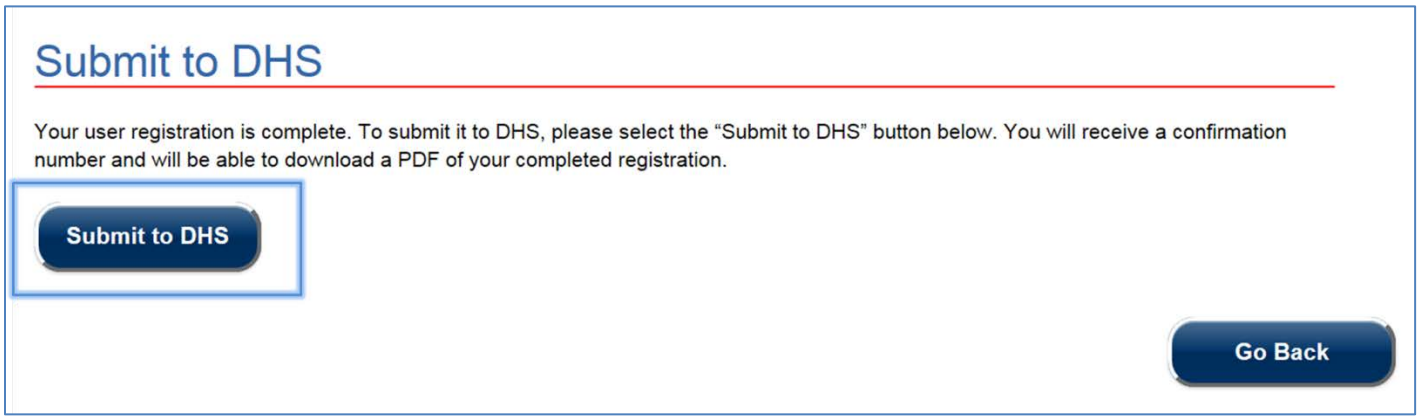


Figure 16: Click the Submit to DHS Button to Complete CSAT Registration

You are prompted by the CSAT system to confirm your submission to DHS.

Click the **Yes** button if you wish to submit your registration.

Select the **[Cancel]** button to cancel your submission and review your entries.

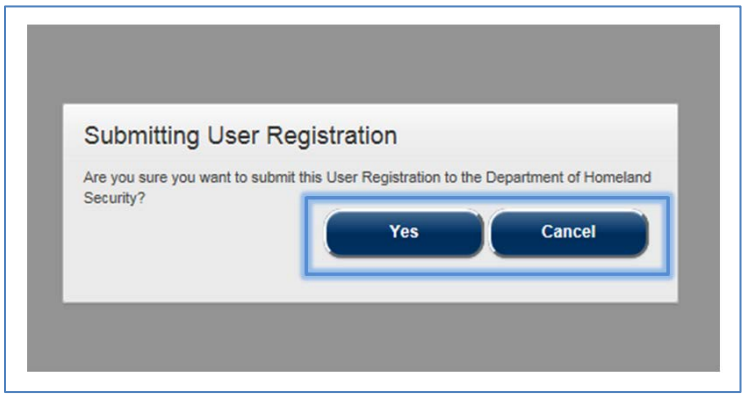


Figure 17: Click Yes to re-confirm your CSAT registration submission

If you select Cancel, you can click the **[Go Back]** button to return to the **Add More Facilities** or other sections of your registration to correct and/or review any of your previous entries.

After you submit your registration, you see a message acknowledging your submission and a confirmation number for future reference. You have the option to download a PDF version for your records.

Click the **[Download PDF]** to download a copy of your registration information.

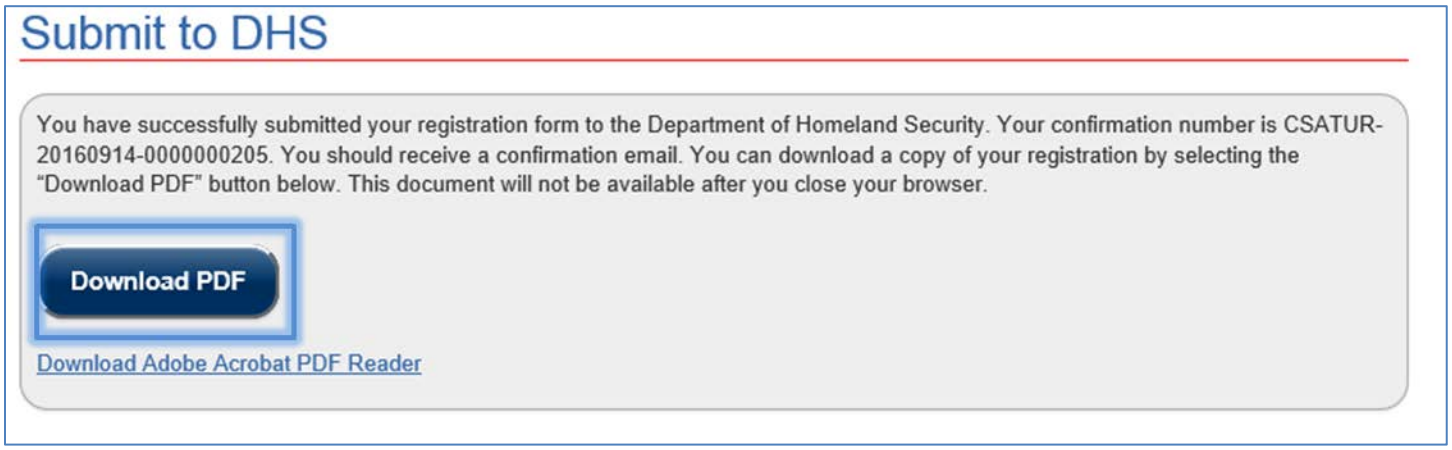


Figure 18: Click the Download PDF Button to Retain a Copy of Your CSAT Registration

Close your browser window when you are done.

You will receive follow-up emails with your registration confirmation, username, and instructions on how to access the CSAT system.

3.2 User Registration with a Challenge Code

This process is available if you have received an invitation from a CSAT Authorizer or Administrator to register for CSAT, or if you received a request to accept an Authorizer transfer role. During this process you receive two separate emails from the CSAT system: one email provides the invitation and link to join CSAT and the other email provides a unique challenge code. After you click or copy and paste the link provided in the email to your browser, the CSAT registration page appears. Review the Privacy and Paperwork Reduction Act Statement and answer to the text challenge question at the bottom of the page. See Section 3.1 for more details.

Enter the **code** you received in your second email from CSAT and click the **[Verify]** button.

Figure 19: Enter the Challenge Code to Continue with CSAT Registration

NOTE The link and challenge code are valid for 14 days. If the code is deactivated or does not work, you may contact your Authorizer or Administrator to initiate a new code challenge. See **Section 9** for details on how to initiate a code challenge.

3.2.1 Existing CSAT User

I have a CSAT Account.

Select **Yes** if you are an existing CSAT User.

Enter your CSAT **username** and **password** and click the **[Submit]** button.

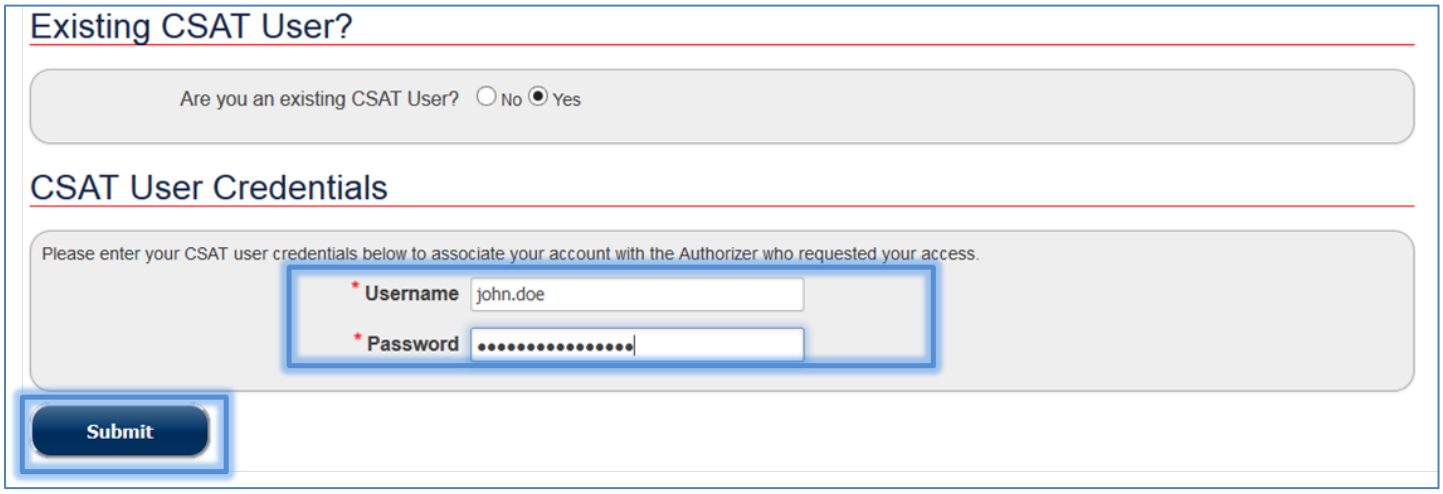


Figure 20: Enter CSAT Login Information For an Existing CSAT User

Close your browser window when you are done.

The updates to your CSAT account are reflected when you log back into CSAT. See Section 4 for login and navigating the CSAT system.

I do not have a CSAT Account.

Select **No** if you are not a registered CSAT user.

Enter your **information** and click the **[Submit]** button.

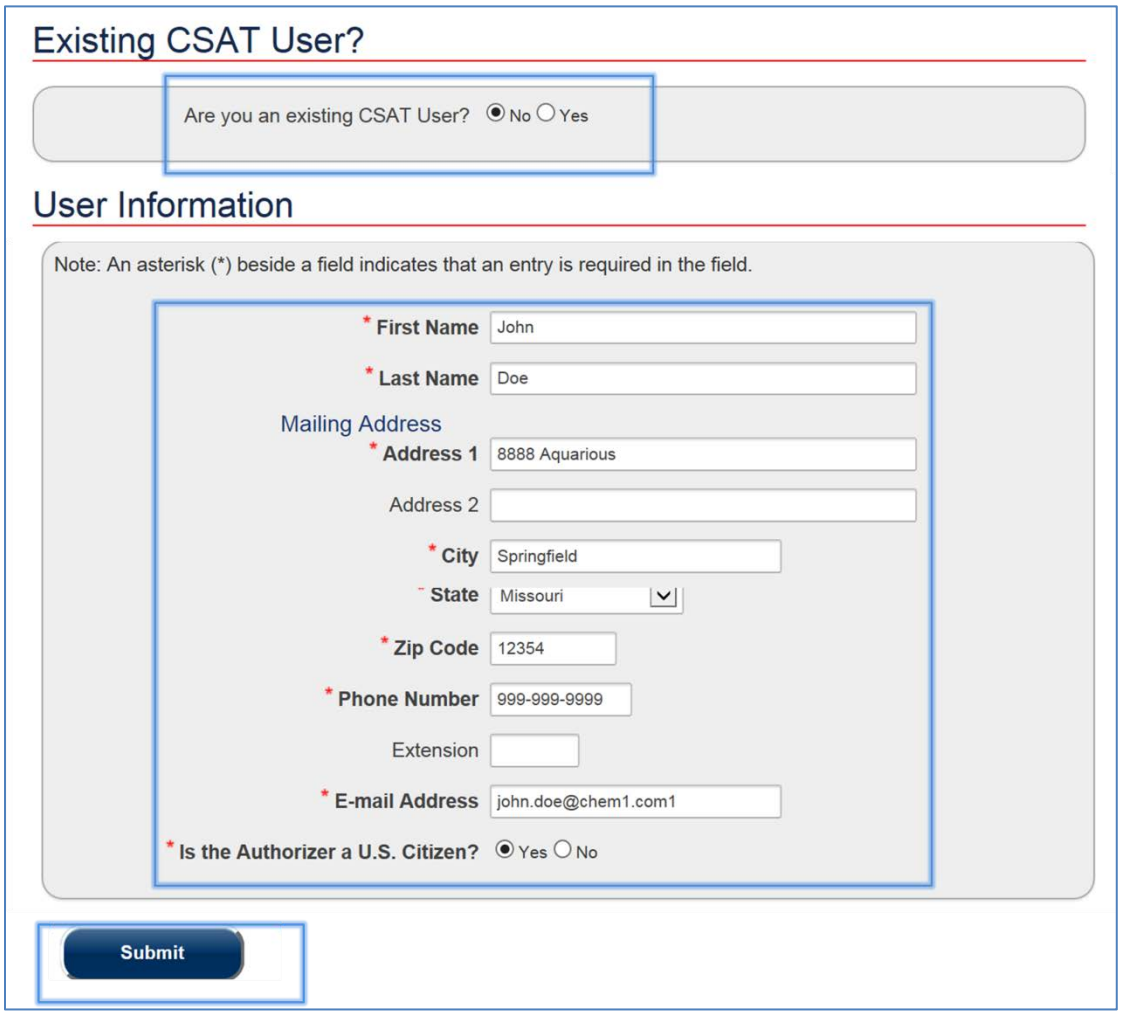


Figure 21: Enter Your Information and Click Submit to Finish the User Registration Process

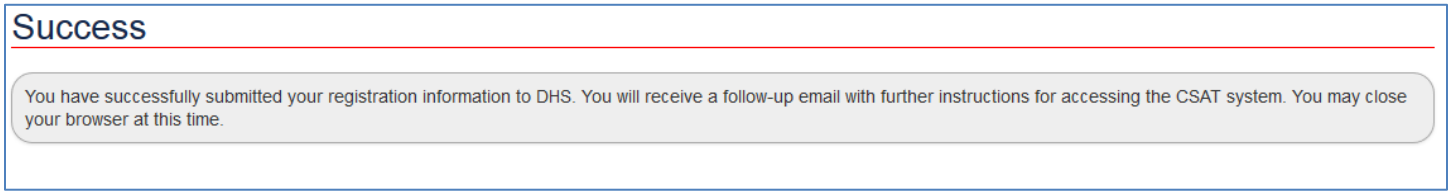


Figure 22: Submission Message for Successfully Completing CSAT Registration

You will receive a follow-up email with further instructions, including username and password, for accessing the CSAT system.

4. Accessing the CSAT Portal

Click the CSAT Portal Link to log into your account. Enter your **username and password** and click the **[Sign In]** button.

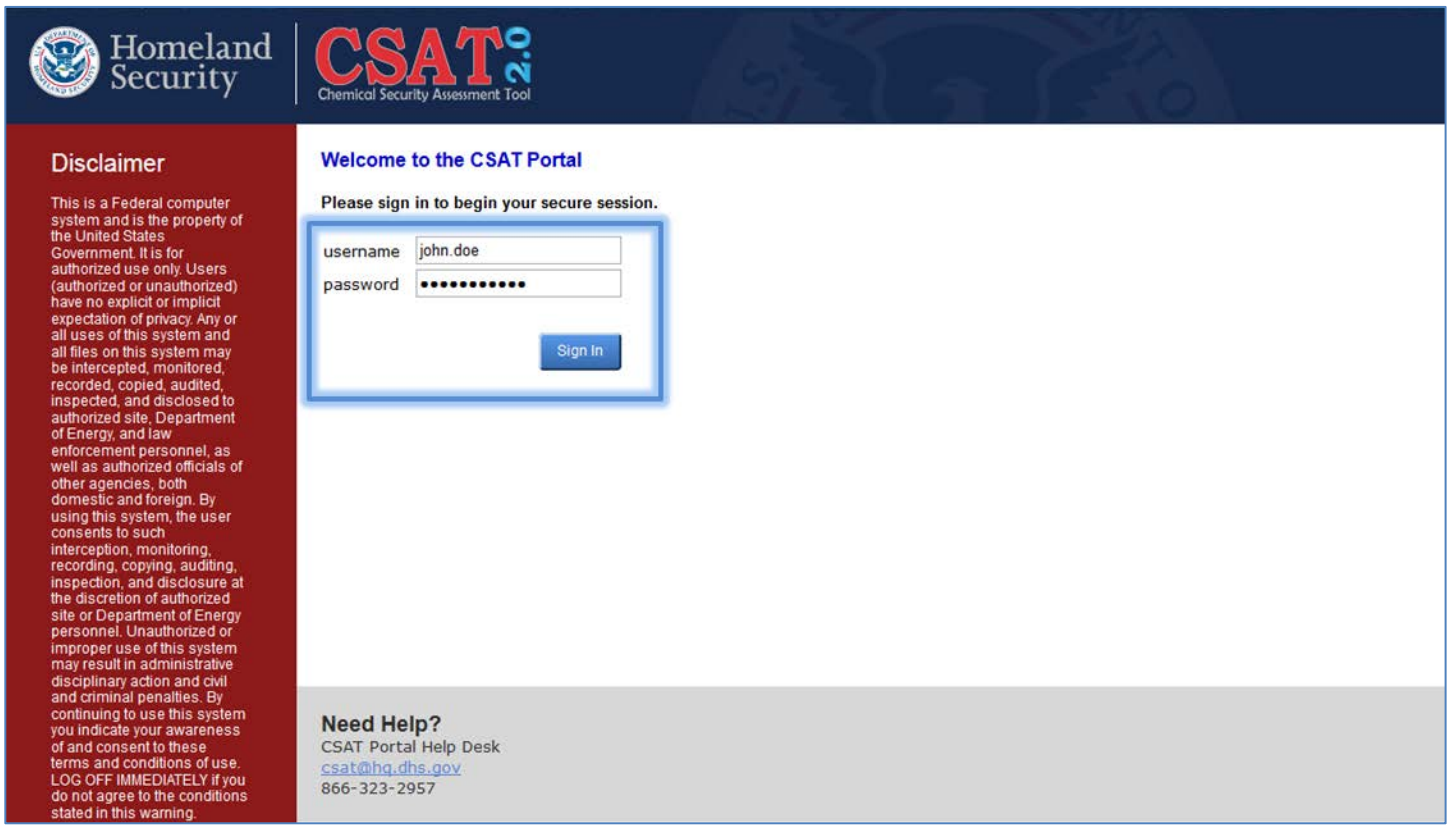


Figure 23: Enter Your CSAT Credentials and Click [Sign In] to Access the CSAT Portal

NOTE Users who receive a CSAT automated password are asked to change the password upon the first login attempt. Follow the guidelines to create a secure password. After you change your password, you are automatically logged out from the system. Click the CSAT Portal Link to log into your account with your new password.

4.1 CVI Authorization

This section applies ONLY if you are logging into CSAT for the very first time.

If you are logging into CSAT for the very first time, you need to enter your Chemical-terrorism Vulnerability Information (CVI) number. CVI is a Sensitive but Unclassified designation used to protect information developed under the CFATS regulation. Completion of CVI training is required for all users. CVI should only be disclosed to CVI-trained individuals.

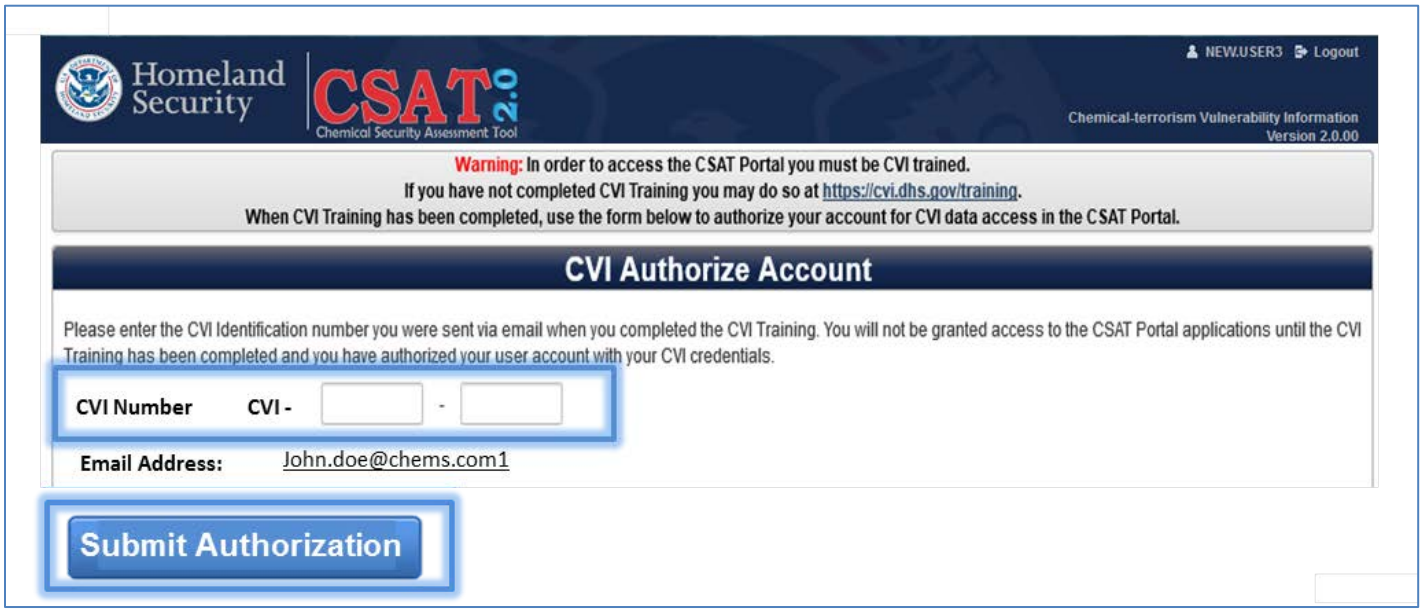


Figure 24: Insert Your CVI Credentials and Click Submit Authorization to Enable Your Account

After you enter the CVI credentials, you are automatically logged off. Close your browser completely.

When you log back into CSAT, your CVI credentials are saved and you are not required to go through this step again.

NOTE If you experience any trouble with entering your CVI credentials, please contact the CSAT Help Desk for assistance.

4.2 Select Authorizer

This section applies ONLY if you work for Multiple Authorizers.

If you work for Multiple Authorizers, you are prompted to select the Authorizer name prior to accessing the CSAT Portal.

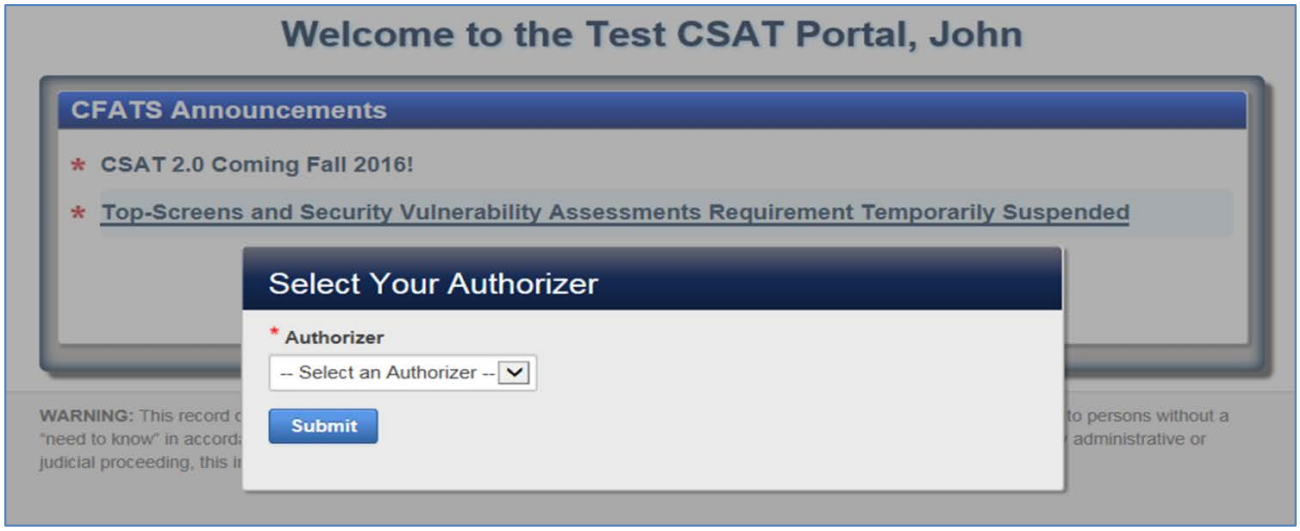


Figure 25: Message Display Prompting a User to Select an Authorizer

Select the **name** from the drop down list.

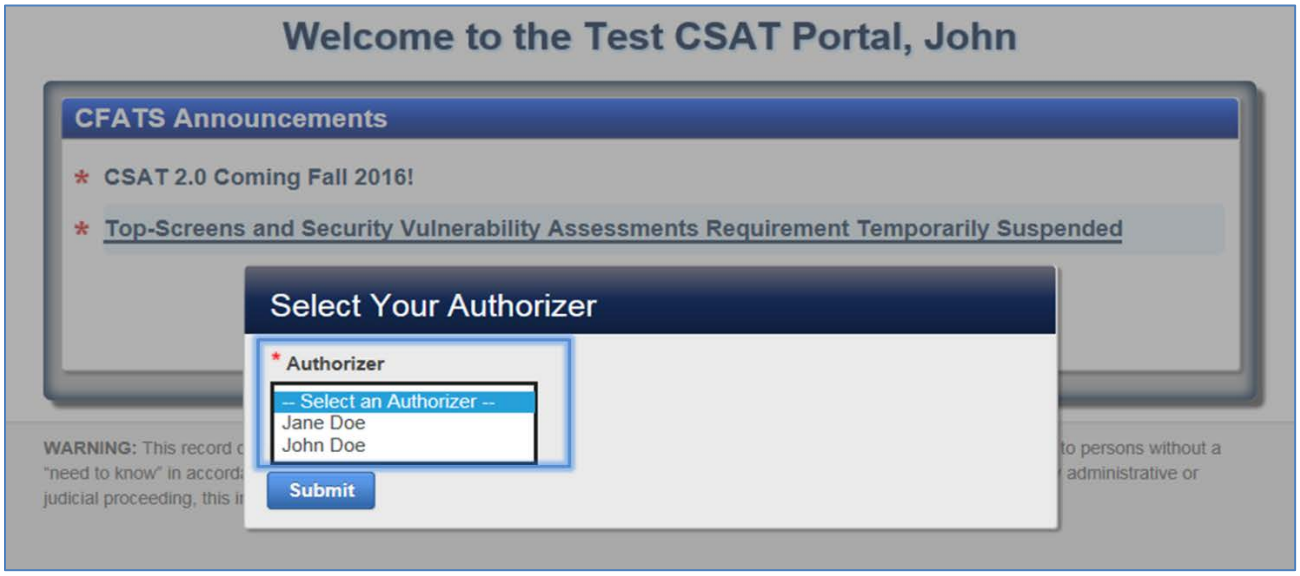


Figure 26: Select the Appropriate Authorizer Role to Continue to the CSAT Portal

NOTE If you are an Authorizer for facilities, your name also appears in this list.

Click the **[Submit]** button to continue to the CSAT Portal.

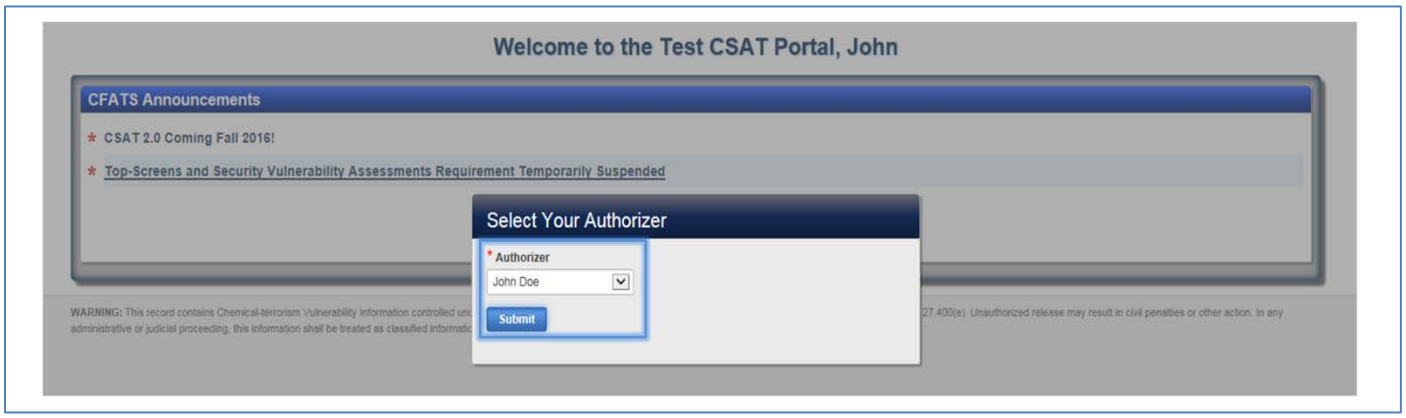


Figure 27: Click the Submit button to continue to the CSAT Portal

NOTE The CSAT Portal only displays information for the facilities under the Authorizer you selected. You need to switch Authorizers to see facilities under a different Authorizer. You may change the Authorizer after you log into the CSAT system at any time. See **Section 10.2** for more details.

5. Navigating the CSAT Portal

The CSAT Portal has a page header with the official DHS Seal and Signature, and the following:

- **Username**: Select the link to manage your account. See Section 10 for more details.
- **Current Authorizer**: Select the link to change the Authorizer. See Section 10.1.2 for more details.
- **Logout**: Select **Logout** to exit CSAT completely.
- Office of Management and Budget (OMB) Control number with corresponding Expiration Date.
- Chemical-terrorism Vulnerability Information (CVI).
- CSAT current version number.
- **Quick Search**: Type a name or ID number of a facility to filter through all your facilities. Each CSAT survey displays the CVI warning disclaimer at the bottom of each page.

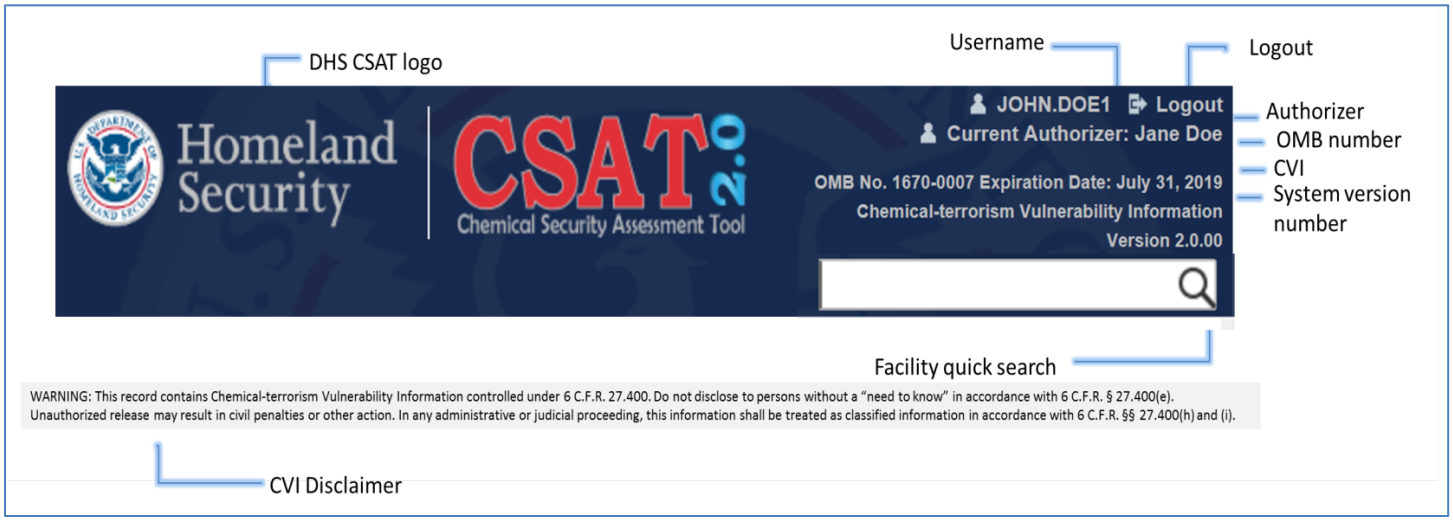


Figure 28: Overview of the CSAT Portal Header and Footer

NOTE CVI is a Sensitive but Unclassified designation used to protect information developed under the CFATS regulation. Completion of CVI training is required for all users. CVI should only be disclosed to CVI-trained individuals.

6. Home Tab

This page shows pending actions for any facility under your Authorizer's purview.

CFATS Announcements: Displays any announcements from DHS. Click on a link to access the details to each announcement. This section is not shown if no announcements are to be displayed.

Surveys in Progress: Displays all the facilities with an active survey. Click on the name of the facility to access the survey via the details page. You can sort this list by facility name, survey name, due date, and days left to submit. See Section 8 for more details.

Pending Extension Requests: Displays any pending extension requests. This feature only appears if items are available to display, otherwise the feature remains hidden. You can sort this list by facility name, survey ID, survey type, date the survey extension was requested, or due date requested.

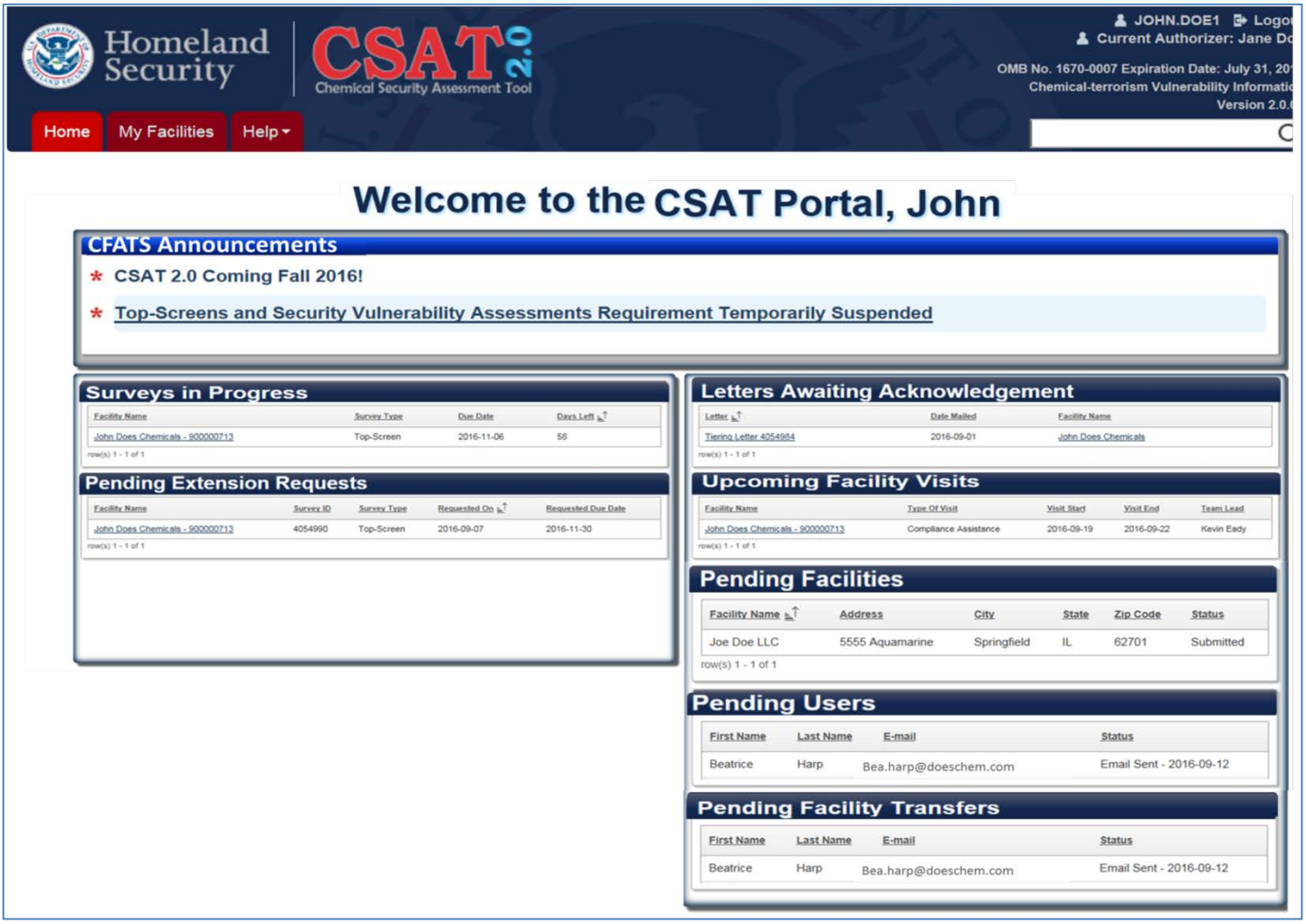


Figure 29: CSAT Home Tab Overview

Letters Awaiting Acknowledgment: Displays any letters awaiting acknowledgment. These letters are formal letters sent by DHS to your facility with information regarding your facility. This feature is displayed to all users but only users with an Authorizer or Submitter role can acknowledge the letters. You can sort this list by letter name, date the letter was mailed, or facility name.

Upcoming Facility Visits: Displays any scheduled DHS visits to a facility, including the DHS Team Lead name. Click on the link to go to the Facility's details page. See Section 7 for more details.

Pending Facilities: This feature only displays if a new registered facility is pending DHS approval. After the facility receives approval, the facility appears in My Facilities details page. See Section 7 for more details.

Pending Users: This feature only displays for Authorizer or Administrator roles along with any pending users or Authorizers. See Section 9 for more details.

Pending Facility Transfers: This feature only displays if a facility has been transferred to another Authorizer. See Section 10 for more details.

NOTE If you work for Multiple Authorizers, this page and the subsequent tabs show the information under the selected Authorizer purview.

Sort by this column feature

Click the **Sort by this column button** to sort the information displayed by ascending order.

Click the **icon** once more to sort the information displayed by descending order.

NOTE The sort function is available on every page that displays a list.

Letters Awaiting Acknowledgment

Click the Letter name link to download the letter.

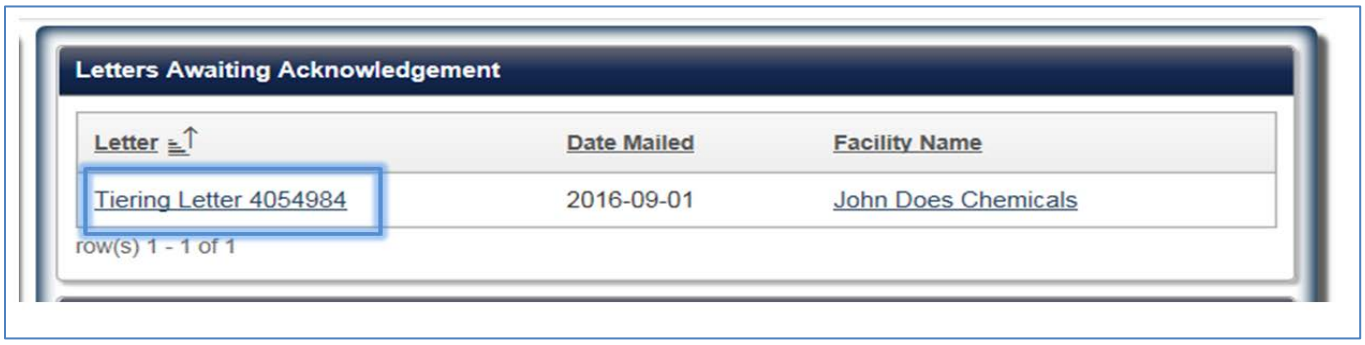


Figure 30: Click the Letter Link to Acknowledge the Letter Sent by DHS

If you are an Authorizer or Submitter, when you close the letter you are asked to acknowledge that you have read the letter. Check the letter acknowledgment statement checkbox and click the **[Submit acknowledgement]** button. Click **[Cancel]** button to cancel the action. The pending action remains on the Home page and the Facility's details page until you submit the acknowledgement.

Figure 31: Check the Acknowledgement Statement and Click Submit to Accept the DHS Letter

NOTE The acknowledged letter is stored in the Facility's detail page. See **Section 8** for more information.

7. My Facilities Tab

This page shows all your registered facilities and any facilities that you have registered but are still pending DHS approval.

Figure 32: My Facilities Tab Page Overview

7.1 Facility Search

The facility search feature is very useful for users that manage multiple facilities. Enter search criteria and click the **[Filter]** button to narrow down the list to the facilities that meet the criteria you specify.

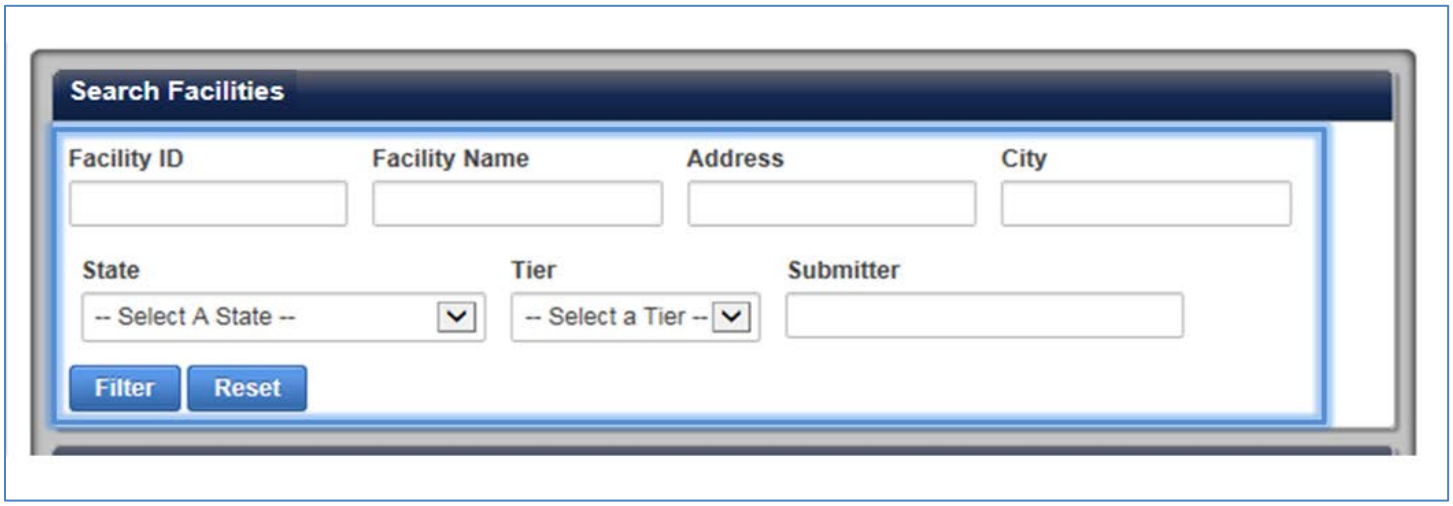


Figure 33: Enter One or Many Search Criterial to Conduct a Search of Your Facilities

The search results display in the My Facilities list. You can refine your search criteria or use the sort column feature to find facilities.

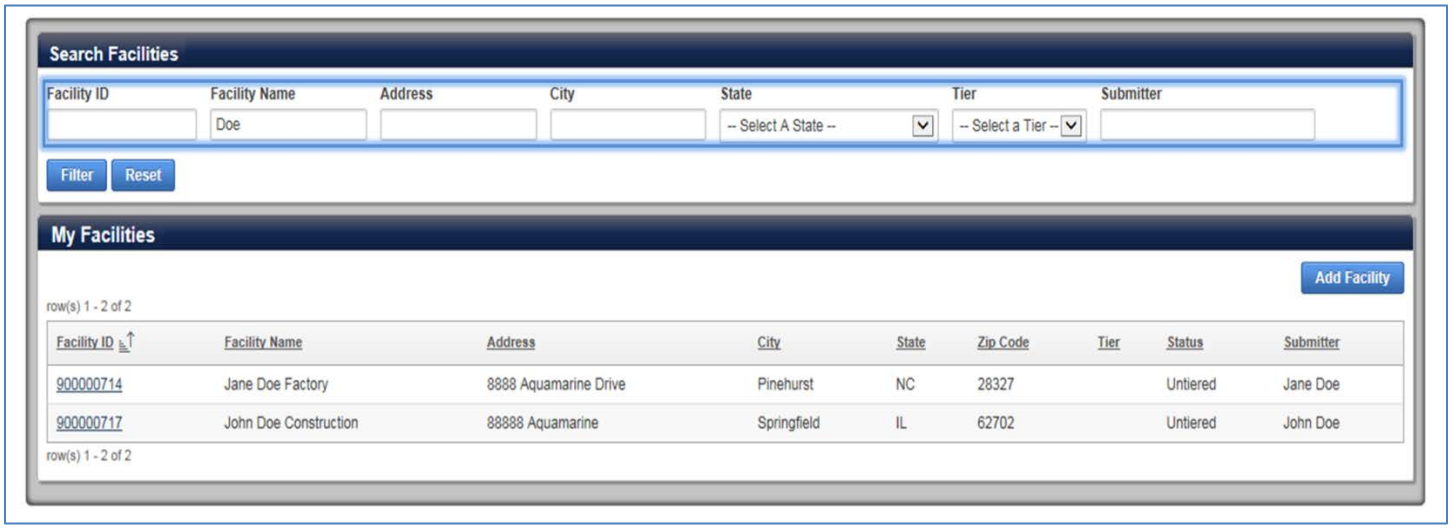


Figure 34: Search Results Displayed in My Facilities List

Click the **[Reset]** button to clear the data and display back all your facilities.

NOTE The message "No facilities found for the selected information" will display if the query has no results to show.

7.2 Add Facility

This section applies ONLY if you have an Authorizer or Administrator role.

Click the **[Add Facility]** button located on the upper right side of My Facilities list to register a new facility.

Figure 35: Click the Add Facility Button to Register a New Facility

See Section 3.1.2 and Addendums A and B for information on how to enter your facility information.

7.2.1 Facility Location

Similar to the CSAT registration process, you must place an X to mark the center of your facility on the map generated by the geospatial tool.

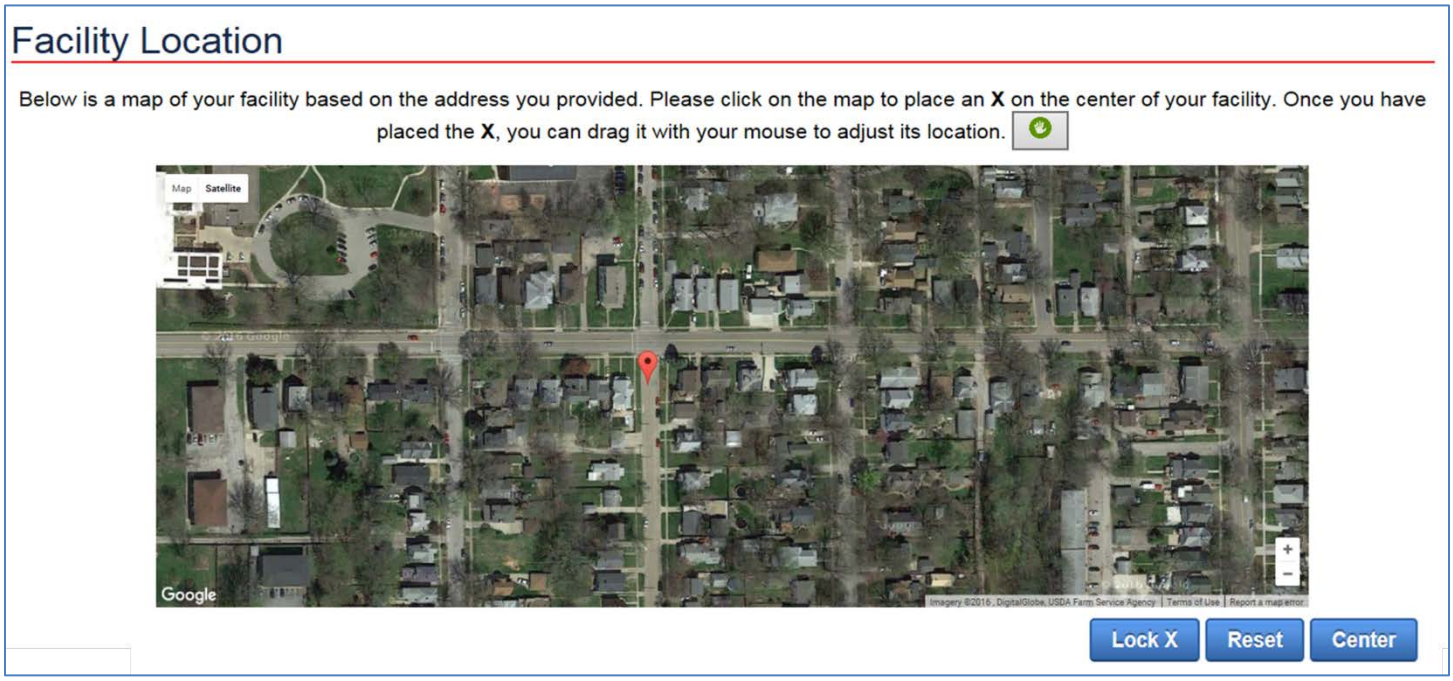


Figure 36: CSAT Portal Geospatial Tool Overview

See Table 2, in Section 3.1.3 for buttons and features of the geospatial tool. The table below describes additional features not described in the earlier sections.

Button/Feature		Function
	Edit X	Allows you to reposition the X on the map to adjust the center of your facility.
	Lock X	Locks the X in the position where it was placed.
	Reset	Deletes any X placed on the map and re-centers the map on the facility marker.
	Center	Centers the map view on the facility's physical address location marker.

Table 3: Geospatial Tool Buttons and Features

Click on the map to place an X on the map. Once you place the X, hover the mouse over the X. When the open-hand vector changes to the pointing icon you can drag the X to the correct location.

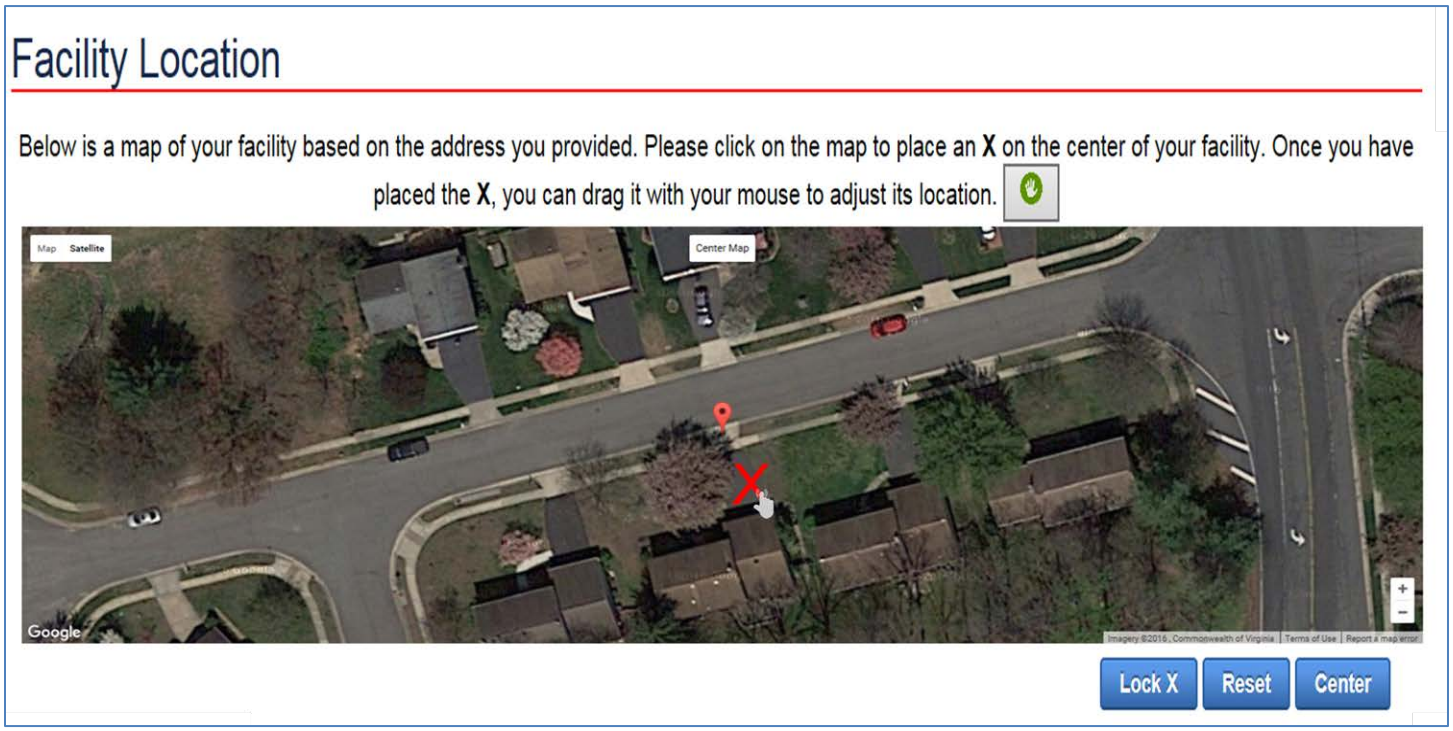


Figure 37: Drag the X to Place it to the Center Location of Your Facility.

NOTE Prior to placing the X, zoom in on the map to get a better view of your facility's center location.

Click the **[Lock X]** button to save the location marked.

Click the **[Reset]** button if you wish to clear the X and restart the placement.

Click **[Center]** to center the map on the facility physical address marker to assist you with the process of defining the center of your facility's location.

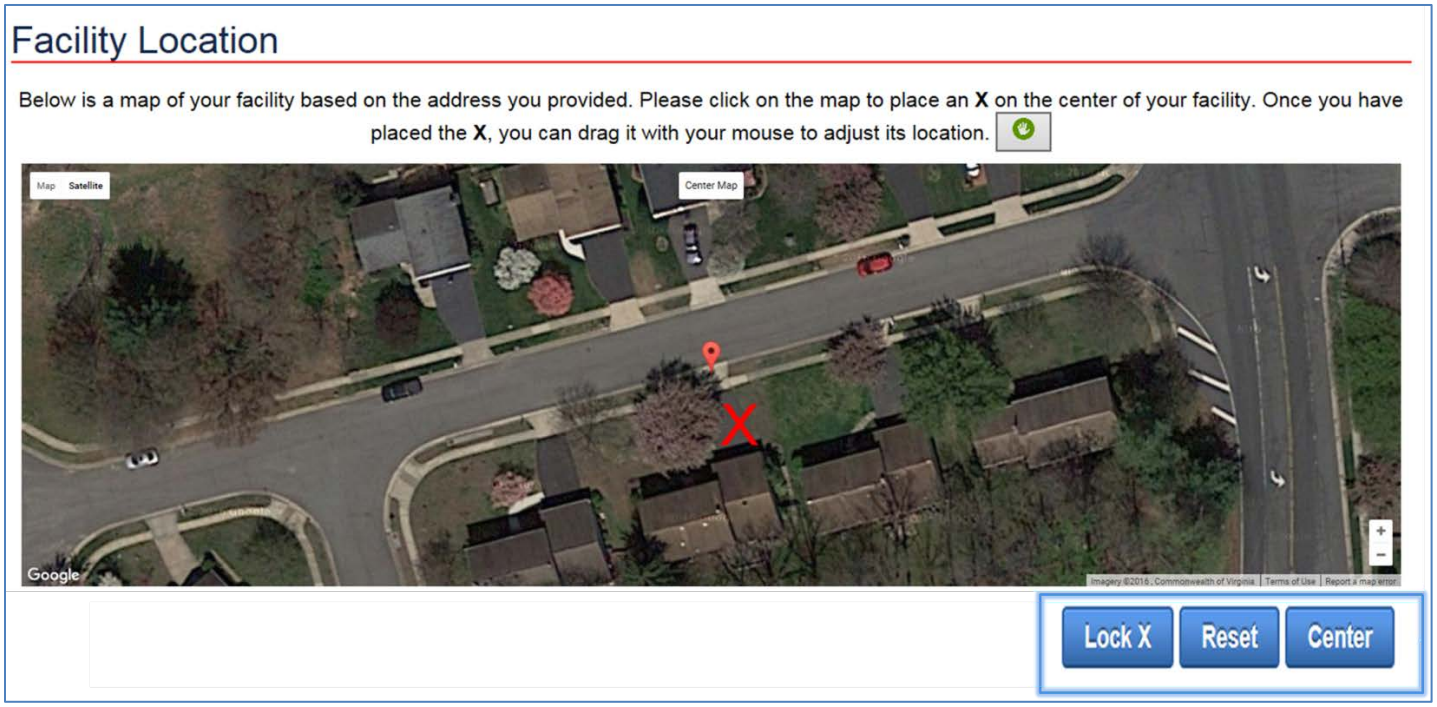


Figure 38: Click the Lock X Button to Save Your Facility Location

Accessibility Button

This feature is designed for individuals who are not able to place the X using the mapping feature. If you can use the mapping feature, it is recommended that you use the map feature instead. See Section 3.1.3 for more details.

Click the **[Edit X]** button found on the top right corner of the geospatial tool after you locked the X. This allows you to open the editing features. Follow the guidelines and options described in the sections above to edit the X.

You must lock the X to complete the facility location.

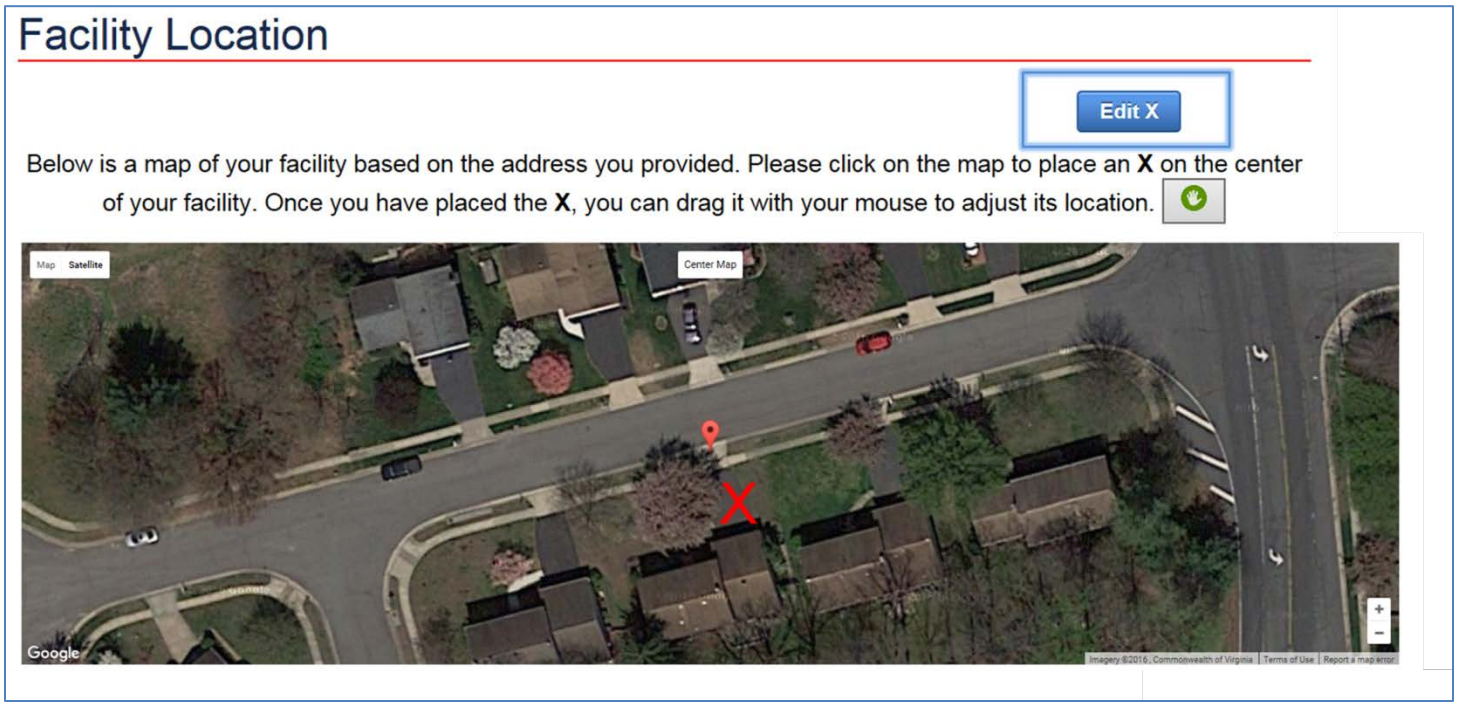


Figure 39: Click the [Edit X] Button on the Top Right Corner of the Geospatial Tool after Locking the X

The new facility shows on your Home page and My Facilities page under the Pending Facilities list until DHS reviews and approves the facility.

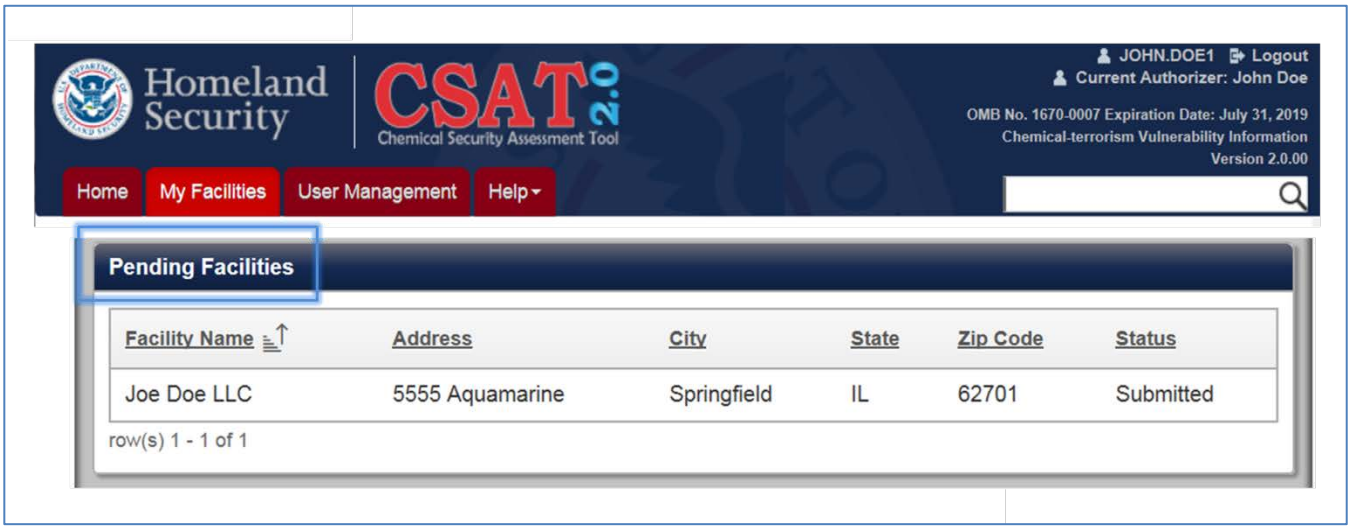


Figure 40: Pending Facility Overview

8. Facility Details Tab

The Facility Details page contains all the current and historical information regarding the facility. If you have access to only one facility, the tab is accessible by default on the top menu. Otherwise, you need to select a facility from the Home page or My Facilities page, or use the Quick search to access this page.

Figure 41: My Facility Details Tab Location Overview

Only one facility details page can be open at a time. The facility's ID appears on the tab name.

Access Facility Details

If you have multiple facilities, use the My Facilities Tab feature to find the facility and click the facility name.

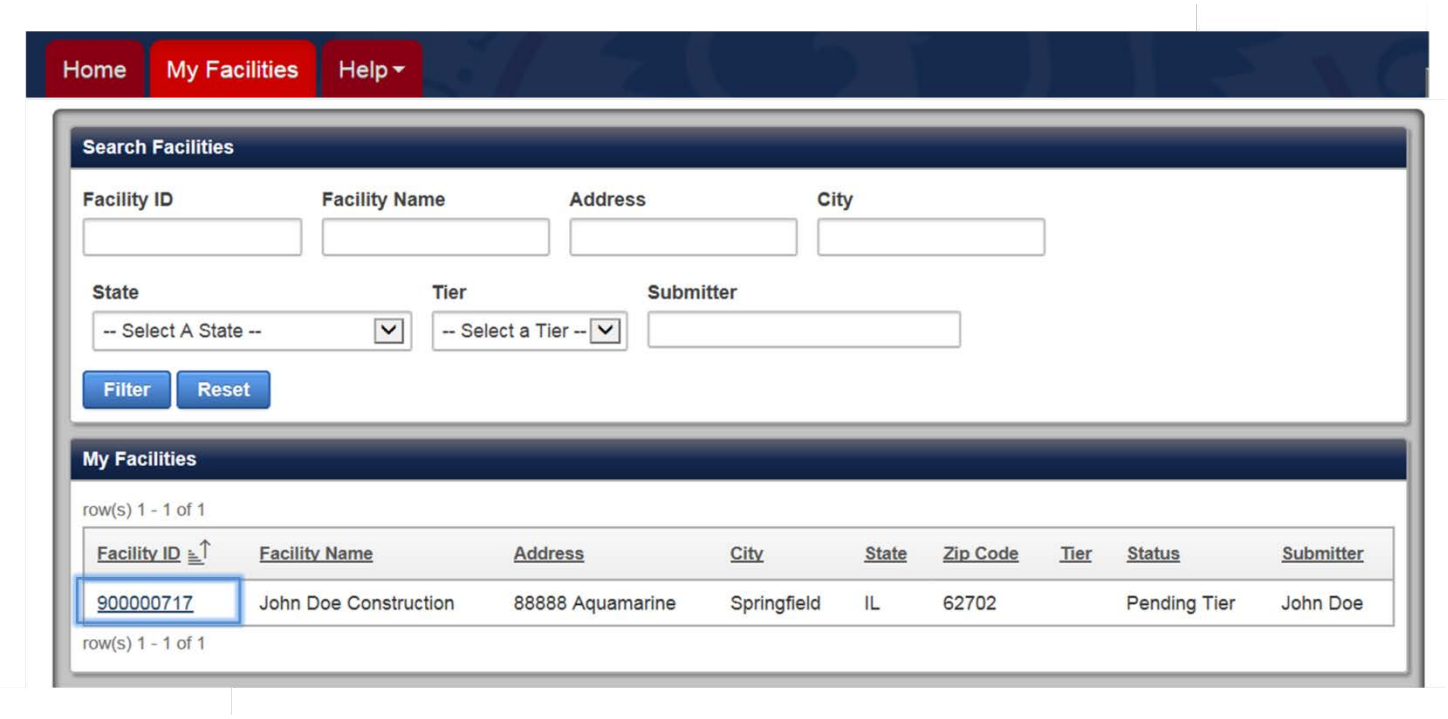


Figure 42: Click the Facility ID Found in the My Facilities List to Access its Details Page.

You can also access the Facility Details Tab if the facility has a survey in progress or other pending actions found on the **Home page** tab**.**

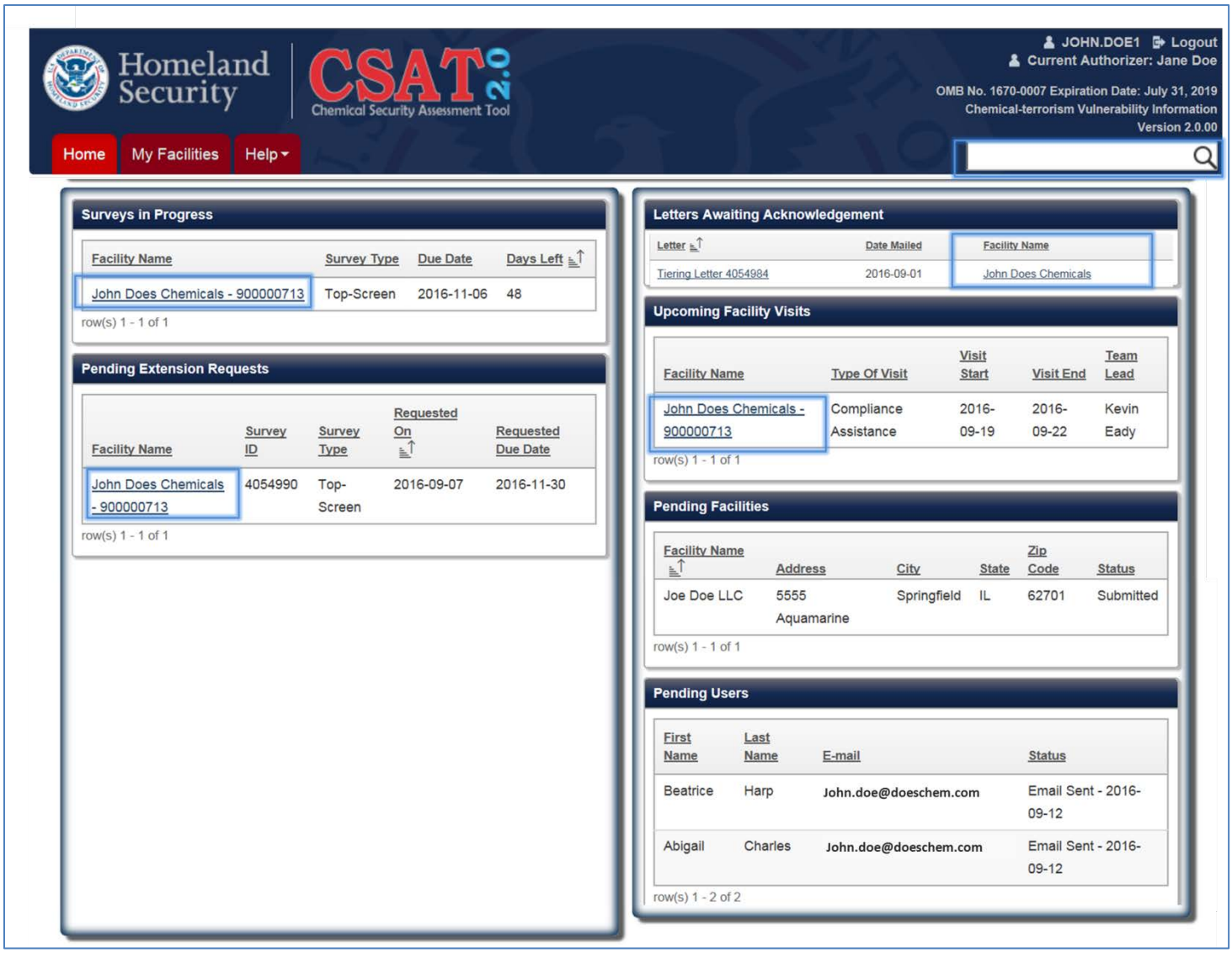


Figure 43: Click Any Facility Name in Any Pending Action List to Access the Facility Details Page

Use the quick search function located on the bottom right side of the header. Type part of the facility's name or ID number and click the name from the list provided.

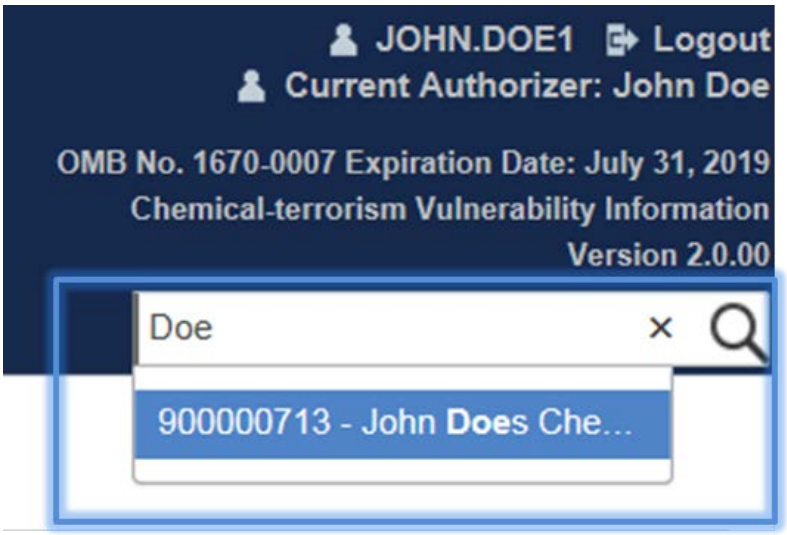


Figure 44: Use the Quick Search to Access a Facility Details Page

NOTE To see another facility's information simply use any of the methods above and click the facility name link.

Facility Details – Overview

This page provides access to all the current and historical data regarding a facility.

Facility ID: Displayed at the top left corner of the page. This a unique identifier number automatically generated for a facility after its registration and DHS review process.

Facility Name: The name you entered for your facility during the registration process.

Facility Tier: Displayed on the top middle of the page. This field represents the high-risk tier ranging from 1-4 designated after the facility has submitted its first Top-Screen. Updates to the facility's Top-Screen survey may change the tier. During the DHS review of a new Top-Screen, the facility tier will show Not Applicable (N/A) status. The facility status shows Untiered if your facility's Top-Screen information is reviewed but does not warrant a Tier 1–4 under the CFATS guidelines.

Facility Status: Displayed on the top right corner of the page. Pending Tier, Tiered, Authorized, and Approved represent the most current status of the facility.

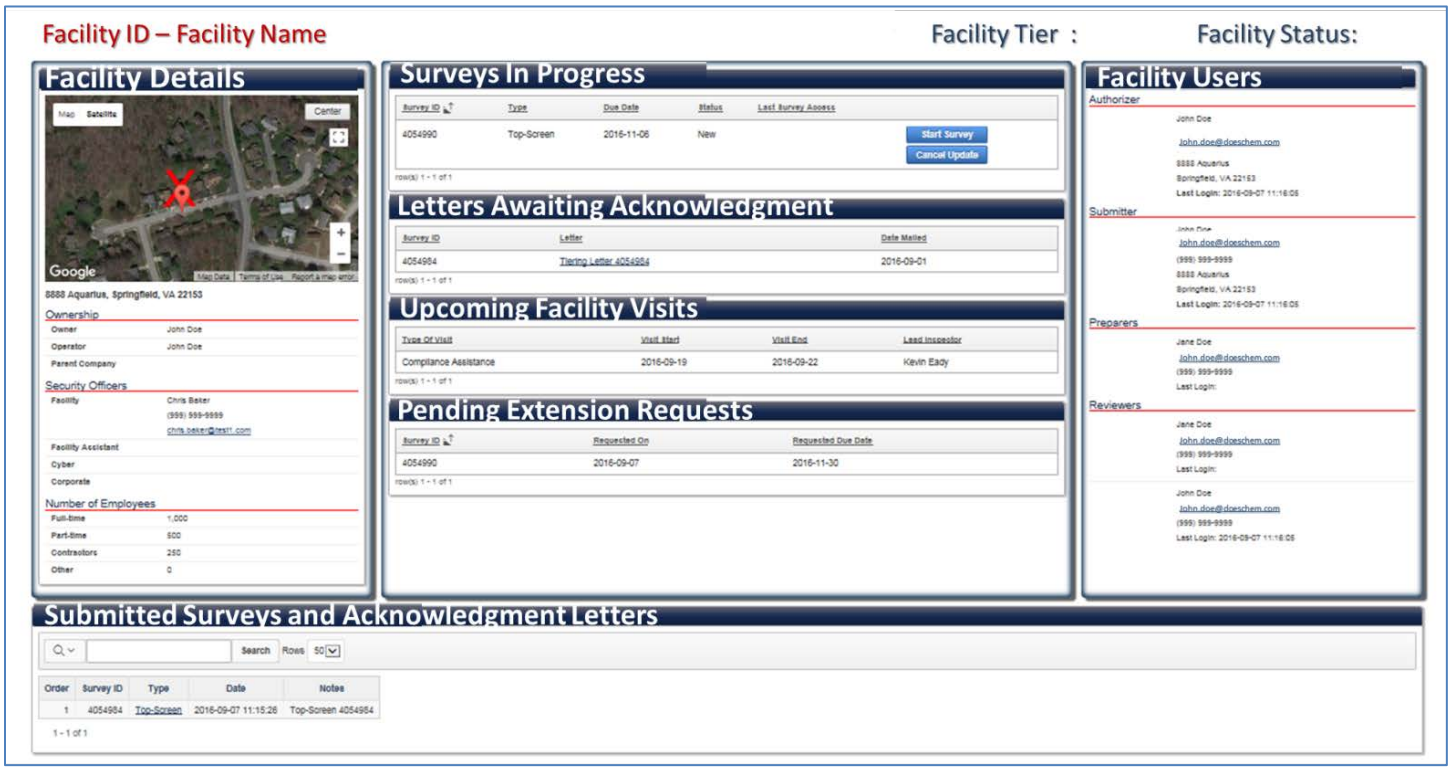


Figure 45: Facility Details Sample Page Overview

8.1 Facility Details

The Facility Details provides a summary of the facility's registration information including its physical address and center location, ownership information, security officer points of contact, and personnel data.

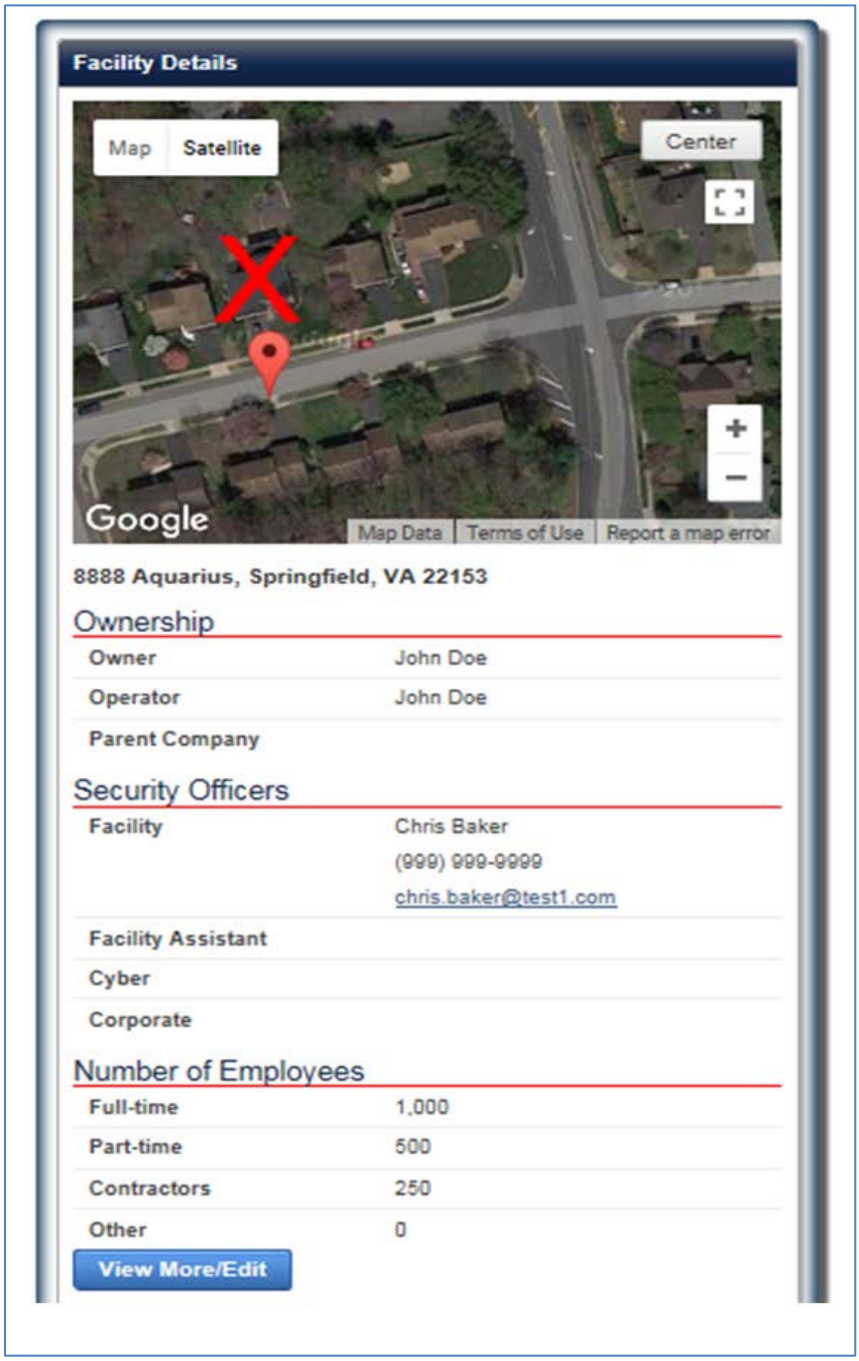


Figure 46: Sample Summary of the Facility Detail Column

8.1.1 Map Features Overview

Below is a map feature overview that displays the facility's center location and physical address that were provided during the facility registration. To update the facility's center and/or physical address information, see Section 8.1.2.

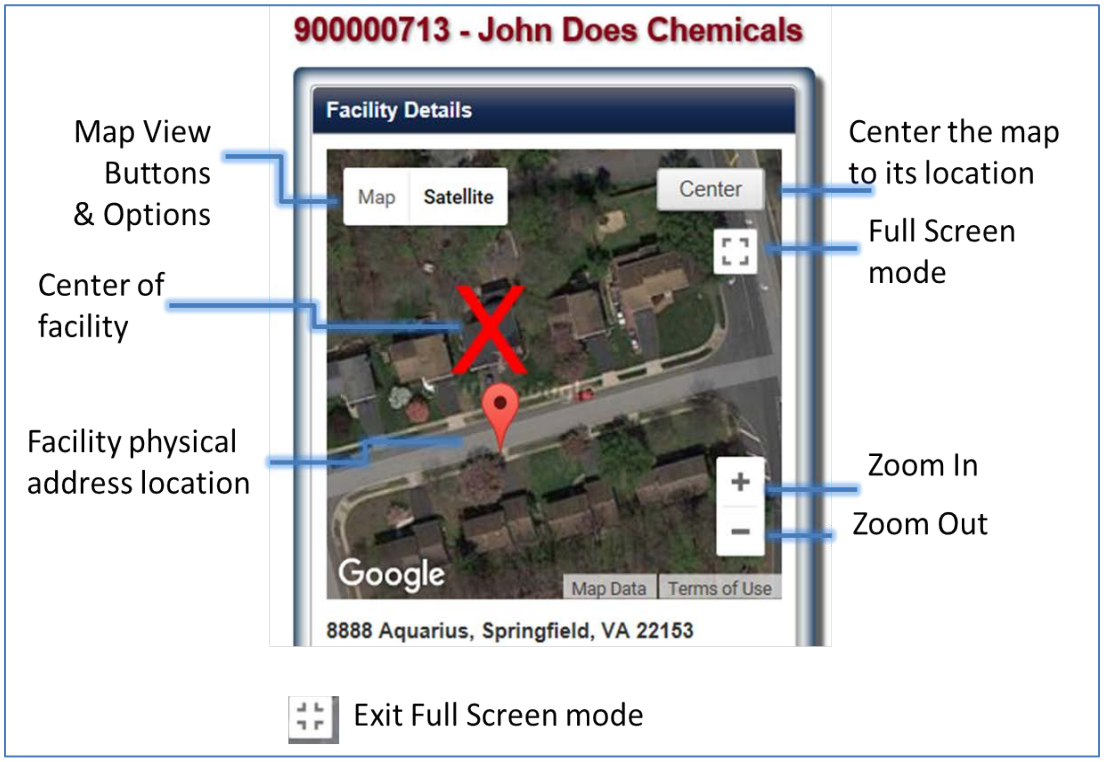


Figure 47: Facility Details Page - Map Features Overview

See Table 2, in Section 3.1.3 for buttons and features of the geospatial tool. The table below describes additional features not described in the earlier sections.

Button/Feature	Function
	Full Screen Mode.
	Exit Full Screen Mode.

Table 4: Facility Details Map Features

8.1.2 Update Facility Details

Click the **[View More/Edit]** button to review more details regarding the facility and/or edit information including updating the location of the facility's address and center location.

Figure 48: Click the View More/Edit Button to Access More Facility Details or Update Information

The web form prepopulated with the most current facility data appears. See figure below for an example.

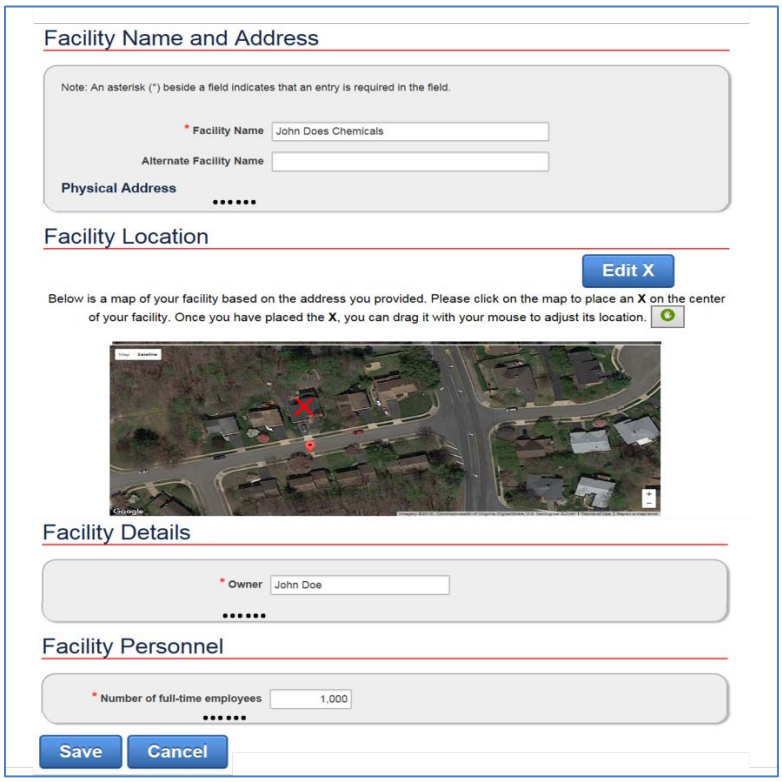


Figure 49: Representative Sample of the Facility Details Page (Not All Fields are Depicted)

Click the **[Edit X]** to change the facility center location. See Section 7.2.1 for more details.

Click the **[Save]** button to save your edits.

Click the **[Cancel]** button at any time to return back to the Facility Details page. Your edits are not saved.

8.2 Surveys in Progress

The Surveys in Progress list shows all the current surveys for your facility. Each line shows the survey ID, type of survey, due date, status, when the survey was last opened, and available actions that can be performed by your role. Each action is further described in the subsequent section.

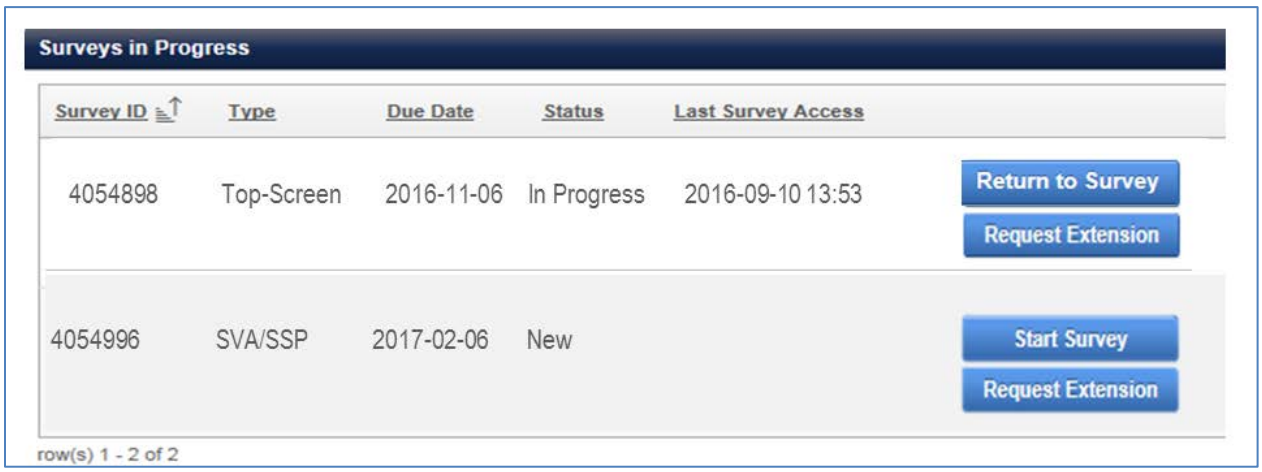


Figure 50: Representative Sample of the Surveys in Progress Column

8.2.1 Start a Survey

Click the **[Start Survey]** button to begin completing a Survey. Next, you navigate to the CSAT Survey Application.

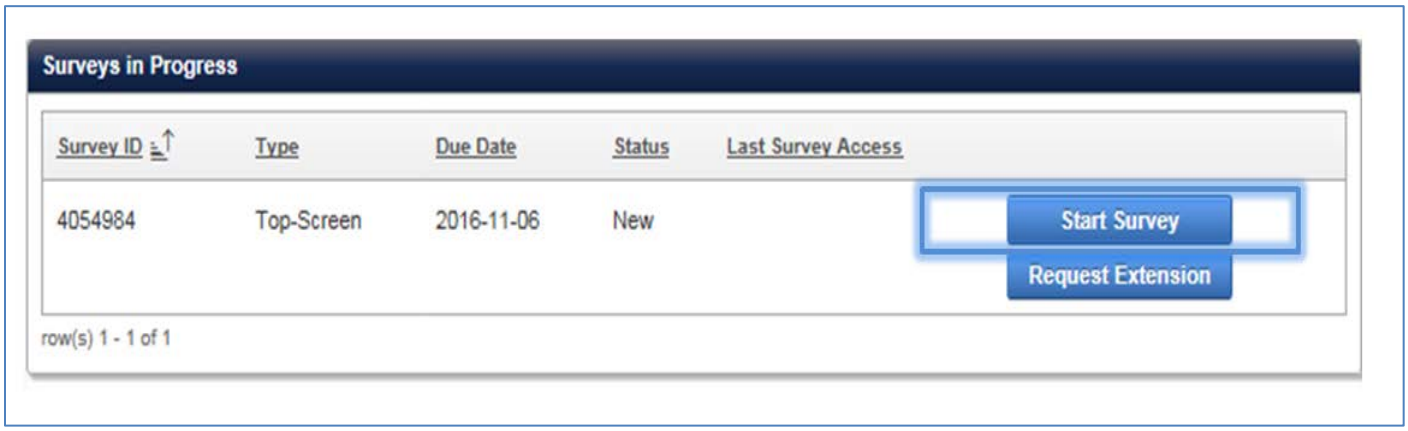


Figure 51: Click Start Survey Button to Begin a CSAT Survey

NOTE See the CSAT Top-Screen Instructions, CSAT SVA/SSP Instructions or **EAP Guidance Document** for more details regarding answering the survey questions.

Click the **[Continue]** button to start your survey

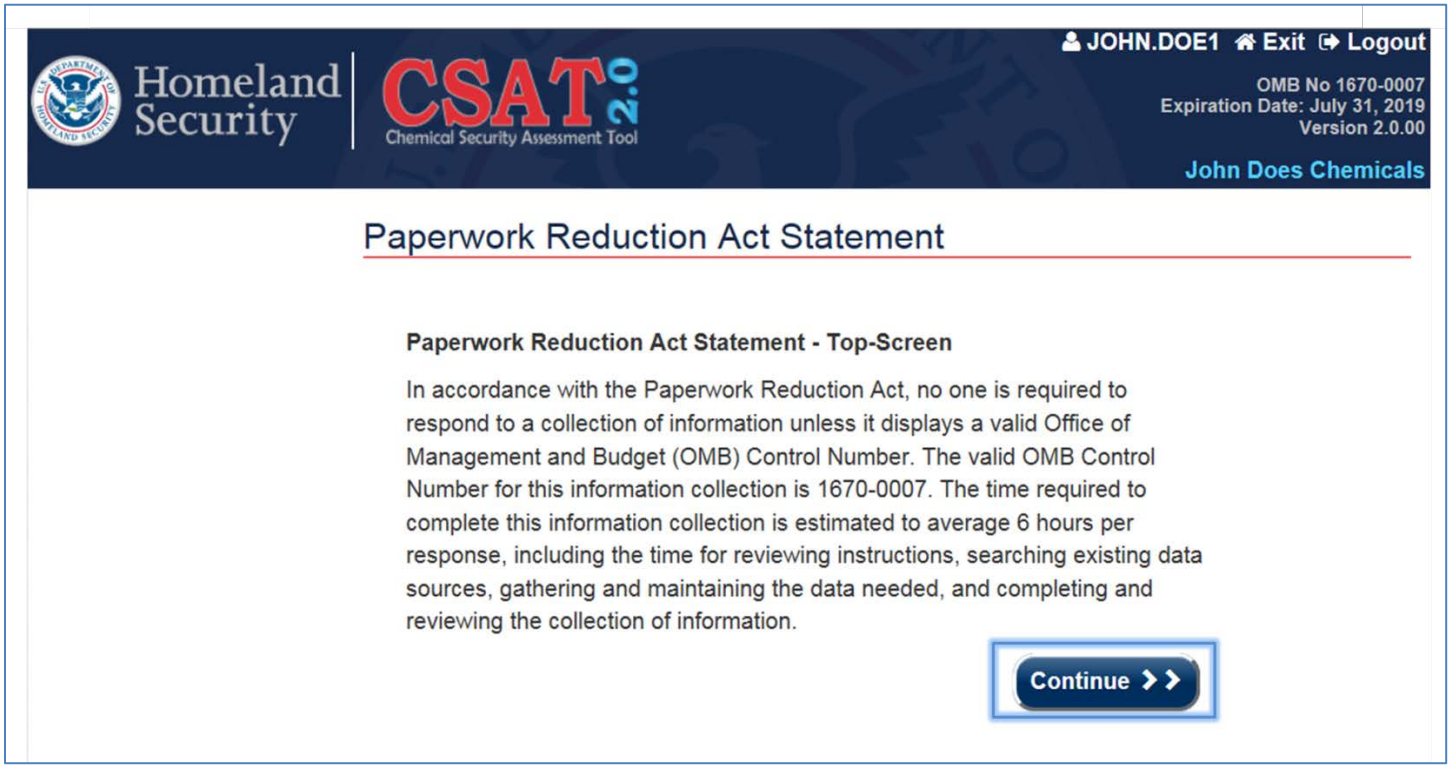


Figure 52: Click Continue to Start a CSAT Survey (Top-Screen Survey Depicted)

NOTE See the CSAT Survey User Manual for more information about using functions and features in the survey application.

Click the **[Exit]** button located at the top right corner of the header to exit the survey. Be sure you save all your information prior to exiting.

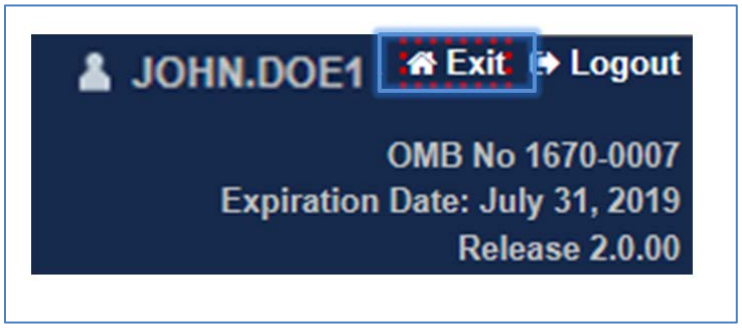


Figure 53: Click Exit to return to the CSAT Portal

Click the **[Leave Page]** button displayed on the warning message to return to the CSAT Portal.

Otherwise, click the **[Stay on Page]** to continue with completing the survey.

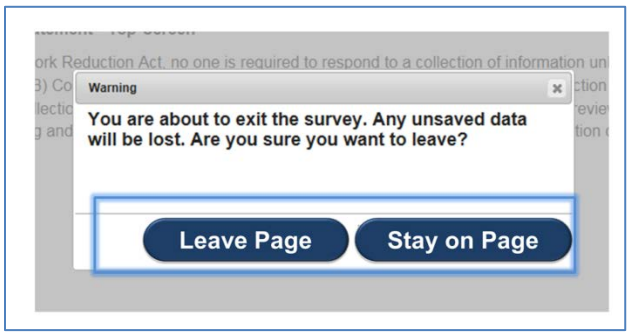


Figure 54: Click Leave Page to Return to the CSAT Portal

8.2.2 Return to the Survey

You have the ability to return to any survey in progress prior to submitting the survey to DHS.

Click the **[Return to Survey]** button to continue to the CSAT survey application and complete your survey.

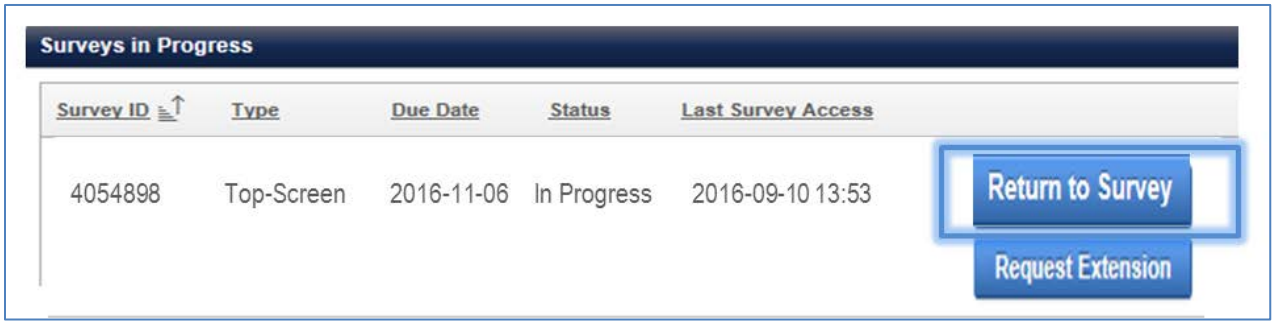


Figure 55: Click Return to Survey to Complete a CSAT Survey with an In Progress Status

NOTE If your facility is a Tier 3 or 4 and you have Notified DHS for Expedited Approval Program (EAP); you can return to the survey to upload EAP files when the Facility Status is set to Ready for Upload.

8.2.3 Update Survey

You may update your submitted survey to DHS at certain points in the CFATS progress. Below is the list of conditions for when you may update your survey:

Top-Screen: You may update this survey at any time after you submitted an initial Top-Screen.

SVA/SSP Survey: You must update the SVA/SSP or SVA/ASP survey when directed by DHS. When your facility is reviewed and approved by DHS you may update your survey after 90 days.

SVA/EAP Survey: You may update the survey after the facility is self-certified and DHS approves the updated request.

The **[Update]** button only appears when your facility meets the conditions listed above.

Click the **[Update]** button to change or edit answers in a survey. The button for each survey shows the survey you want to update. For example, the button shows **[Update Top-Screen]** or **[Update SVA/SSP]** for the Top-Screen and SVA/SSP, respectively.

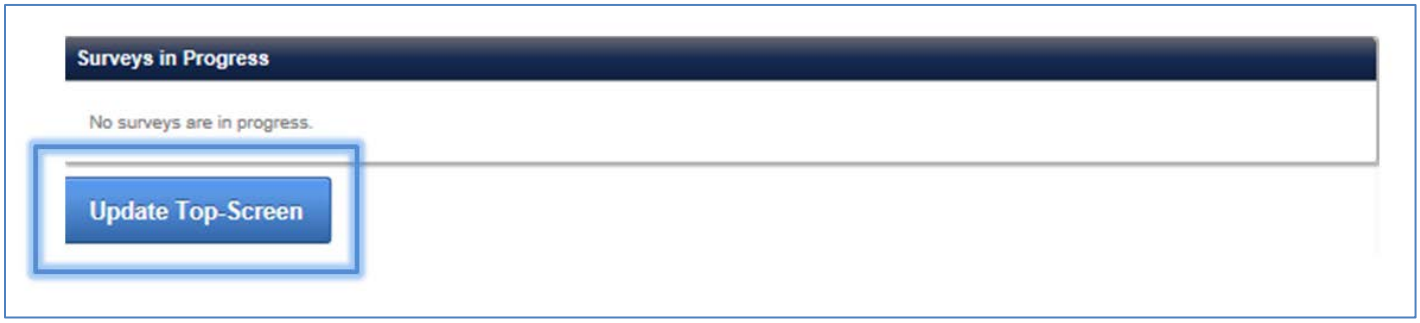


Figure 56: Click the Update Top-Screen to Edit the Top-Screen Survey

A notification displays describing the process of updating a survey.

Click the **[Submit]** button to continue with the update. Otherwise, click the **[Cancel]** button.

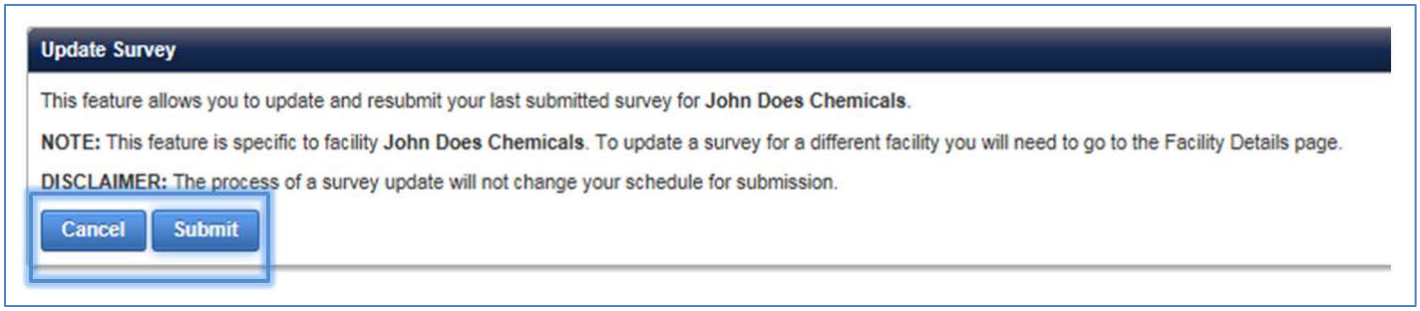


Figure 57: Click Submit to Continue to the CSAT Survey Application and Update Your Survey

Once you submit the request to update your survey, you return back to the Facility Details page.

For EAP, DHS must approve the updated request before the EAP upload is available.

Click **[Start Survey]** to continue to the CSAT survey application and edit the necessary information.

Click **[Cancel Update]** if you do not wish to edit the information. You can do this at any time prior to resubmitting the updates. No changes are saved.

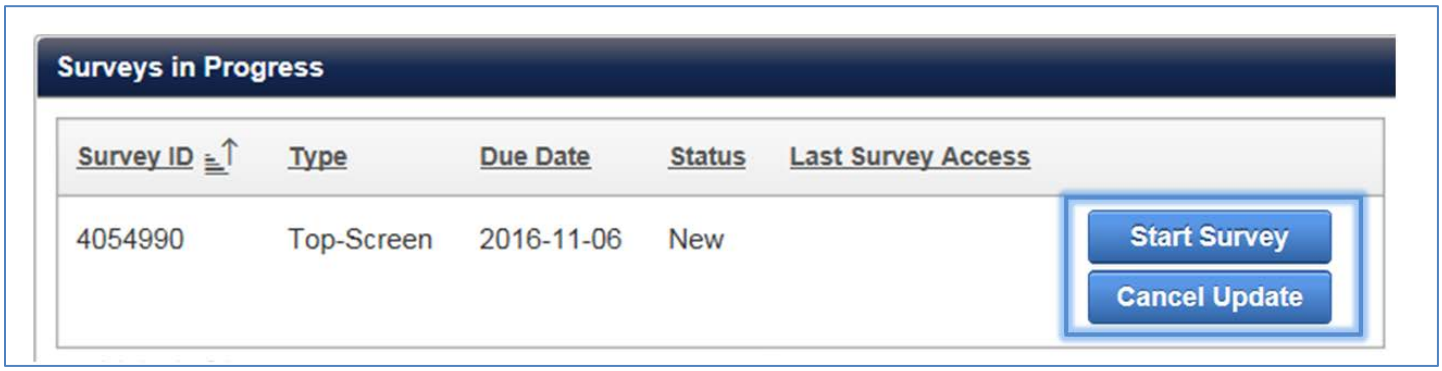


Figure 58: Click Start Survey to Begin an Update to a Survey or Click Cancel Update to Cancel the Action

NOTE If you requested a SVA/EAP survey update, the survey does not appear in the Surveys in Progress until DHS has reviewed and approved the update request.

If you click the **[Cancel Update]** button, you must confirm the cancellation.

Click the **[Submit]** to complete the cancellation.

Otherwise, click **[Cancel]** to return back to the Facility Details page.

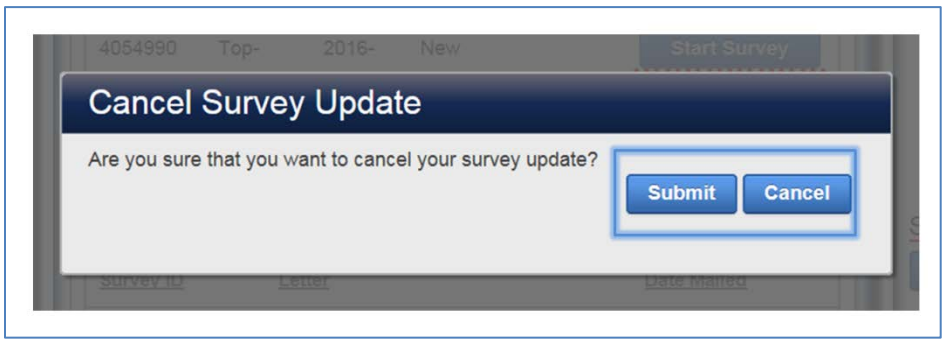


Figure 59: Click Submit to Complete the Update Survey Cancellation

Request Extension

A user with a Submitter role can request a due date extension to complete and submit a survey in the CSAT system.

Click the **[Request Extension]** button found to the right of each survey listed in the **Surveys in Progress** list.

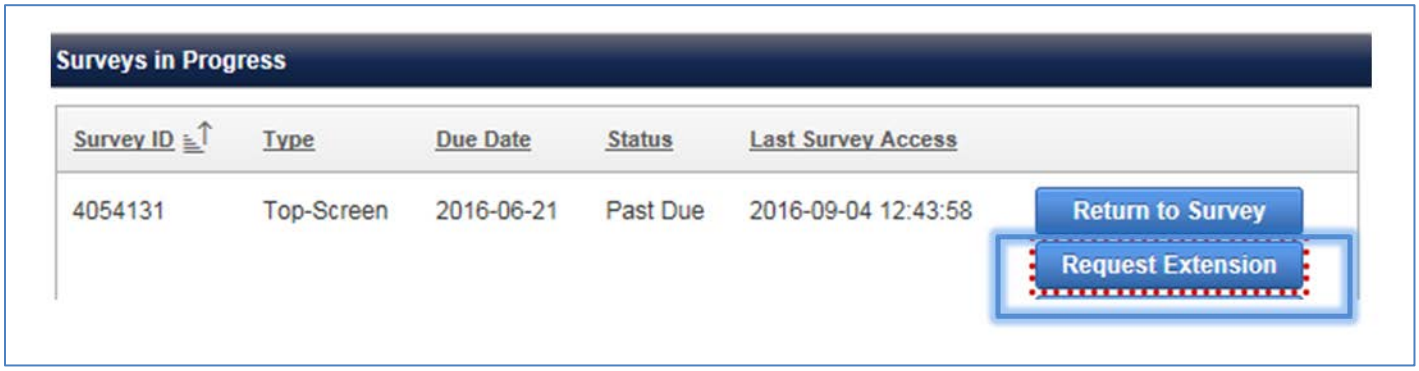


Figure 60: Click Request Extension to Extend a Due Date for a CSAT Survey

A web form appears for you to enter information relevant to your request in the **explanation box**. Click the **calendar icon** to get a monthly calendar where you can select the proposed due date.

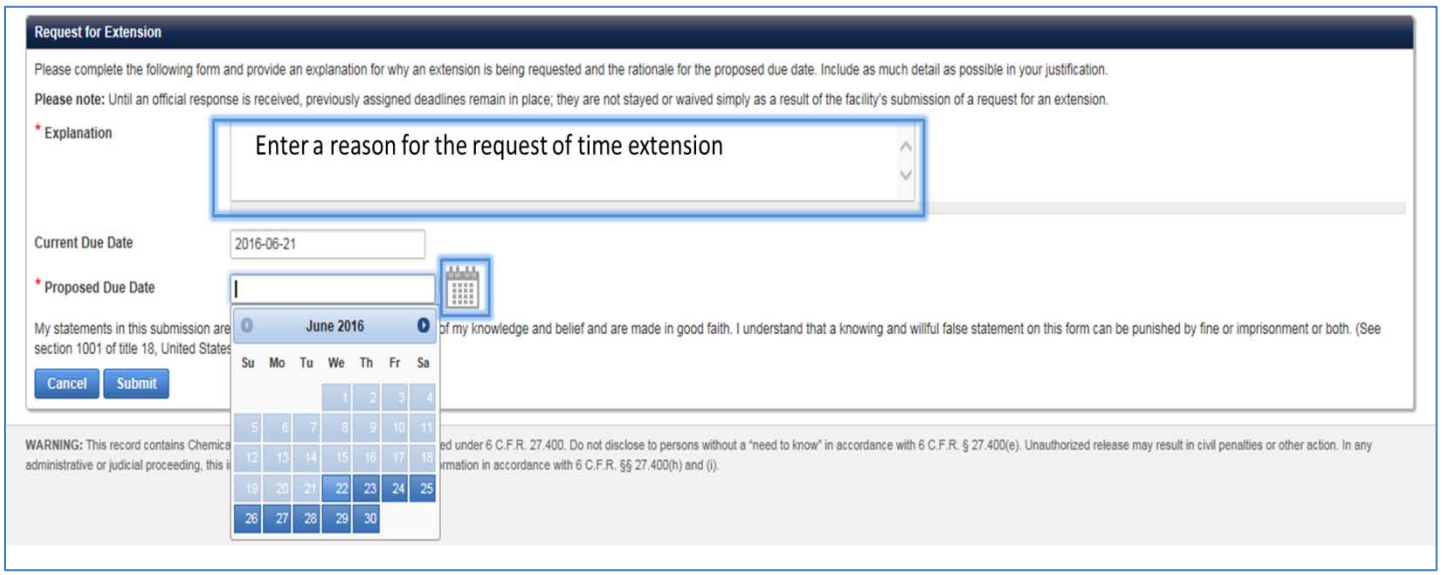


Figure 61: Provide the Necessary Information to Complete the Request for Extension Form

Click **[Submit]** to complete the request for extension.

Otherwise, click **[Cancel]** to return to the Facility Details page.

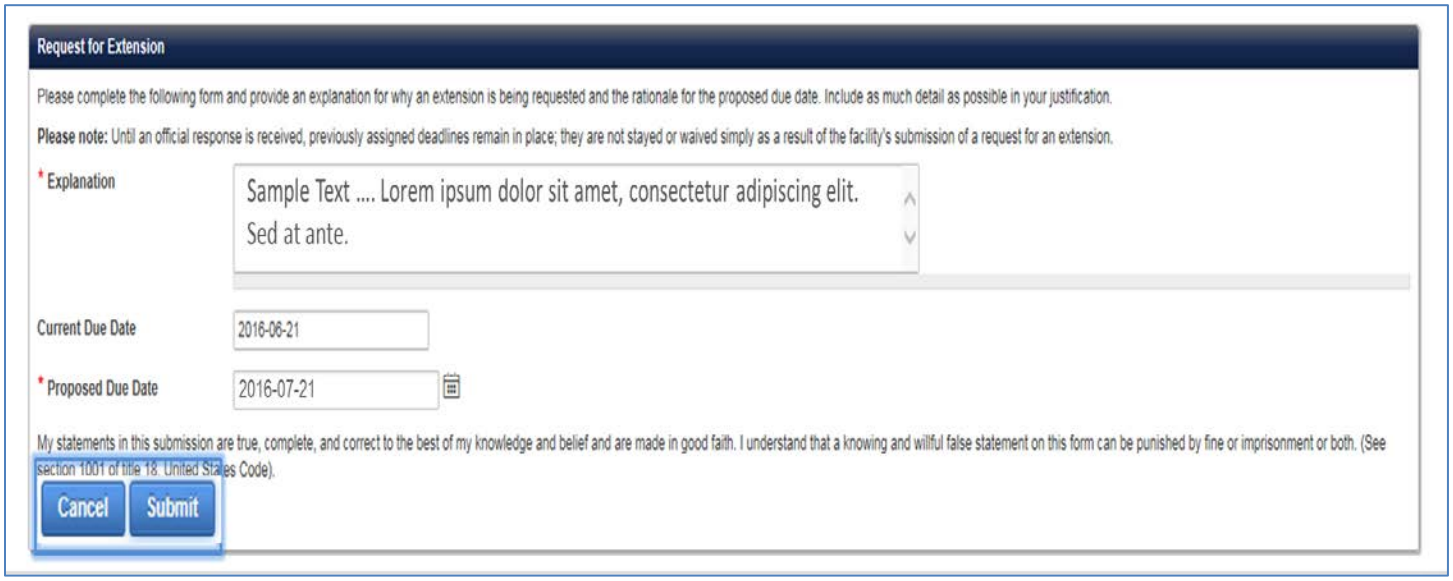


Figure 62: Click Submit to Complete the Request for Extension

NOTE Upon receipt of the extension request, DHS reviews all relevant information and notifies your facility of its decision through the CSAT system.

The request shows on the **Pending Extension Requests**, found in the Facility Details (see Overview in this section) and the Home pages (see Section 6).

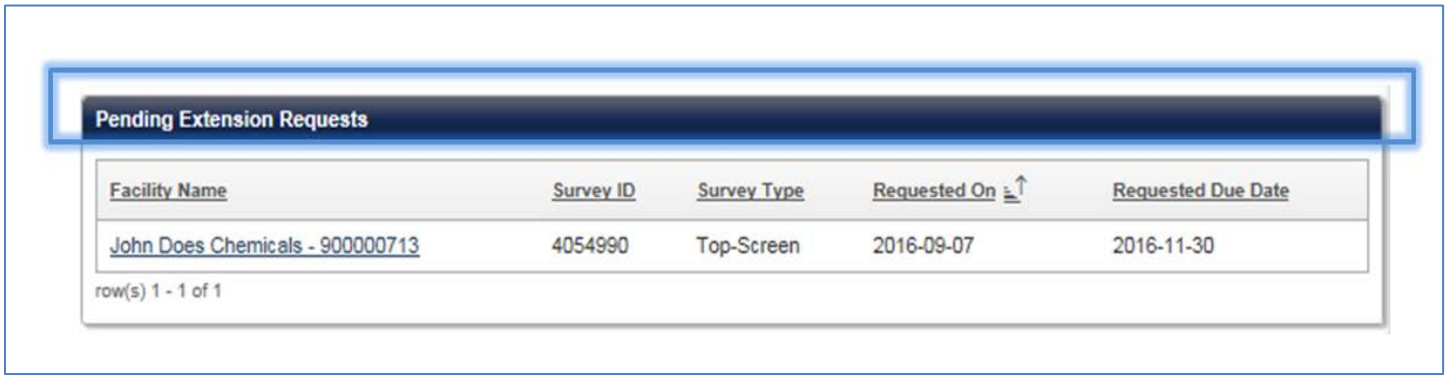


Figure 63: Pending Extension Requests can be Reviewed in the Home Page and the Facility Details Page

8.2.4 Letters Awaiting Acknowledgment

Click the **Letter name** link to download the letter.

Figure 64: Click the Letter Name Link to Acknowledge the Letter Sent by DHS

If you are an Authorizer or Submitter, when you close the letter you are asked to acknowledge that you have read the letter. Check the letter acknowledgment statement checkbox and click the **[Submit acknowledgement]** button. Click **[Cancel]** button to cancel the action. The pending action remains in the Home page and the Facility Details page until you submit the acknowledgement.

Figure 65: Check the Acknowledgement Statement and Click Submit Acknowledgement to Accept the DHS Letter

After you acknowledge the letter, the letter is displayed in the Submitted Surveys and Acknowledged Letter list where you are able to open and view the letter.

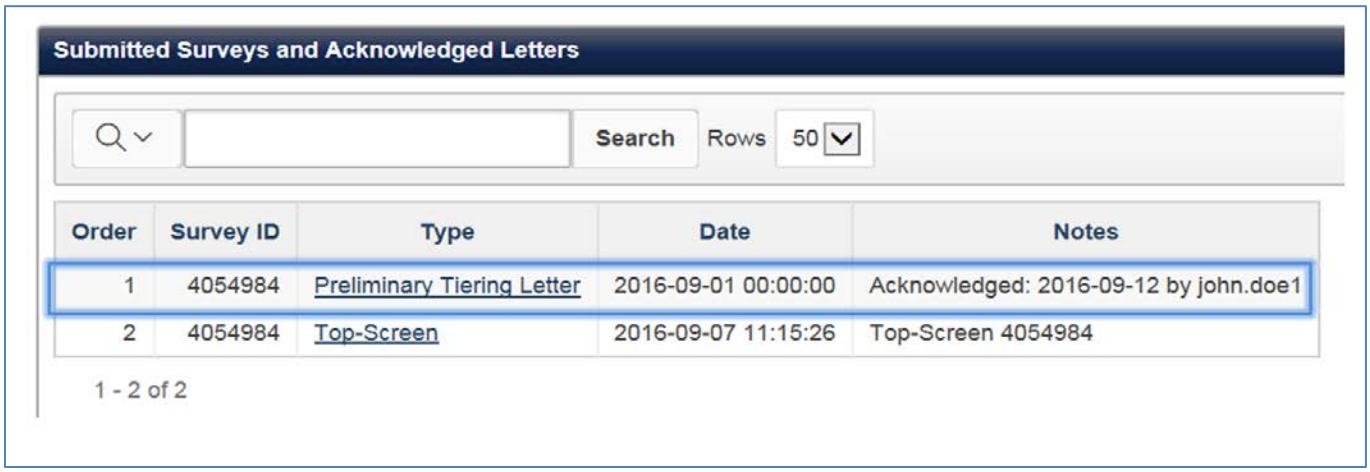


Figure 66: Acknowledged Letter Appears in the Submitted Surveys and Acknowledgment Letters Column

8.2.5 Submitted Surveys and Acknowledgement Letters

The Submitted Surveys and Acknowledgement Letters searchable list contains all the surveys submitted by the facility and any letters received from DHS. Click on any link to view and download a PDF. Below is an overview of the search functions of this feature.

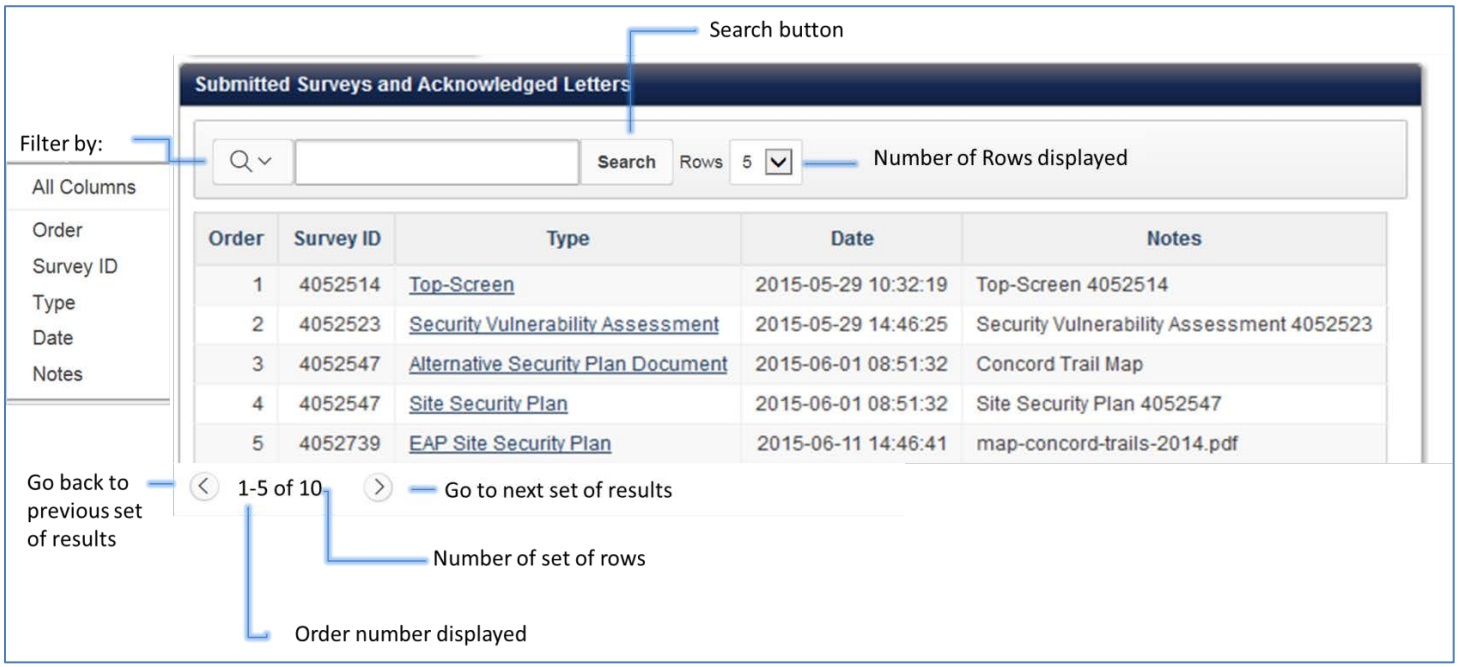


Figure 67: Search Surveys and Letters Overview

8.2.6 Search Feature

Click the **[Filter]** magnifying glass icon to select from the dropdown list the columns that contain the keyword for your search parameters. For example, if you are searching by Top-Screen, select Type. You may select to search by one column at a time or all columns. Enter part of a keyword or number and click the **[Search]** button. You can change the amount of rows displayed by clicking on the row dropdown option.

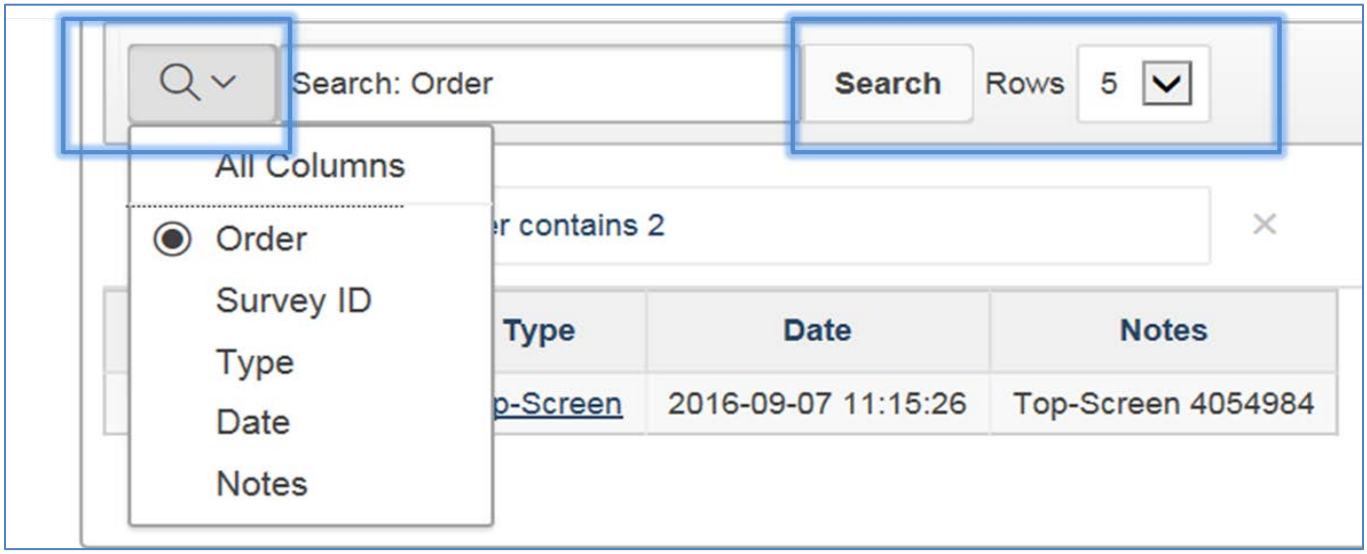


Figure 68: Search Submitted Surveys and Acknowledged Letters Features

The results are displayed with a green filter icon showing the parameter details chosen. You can add more filters to refine your search. If you have multiple filters set, uncheck any to widen your search. Click on the **[Delete], X icon**, to restart your search.

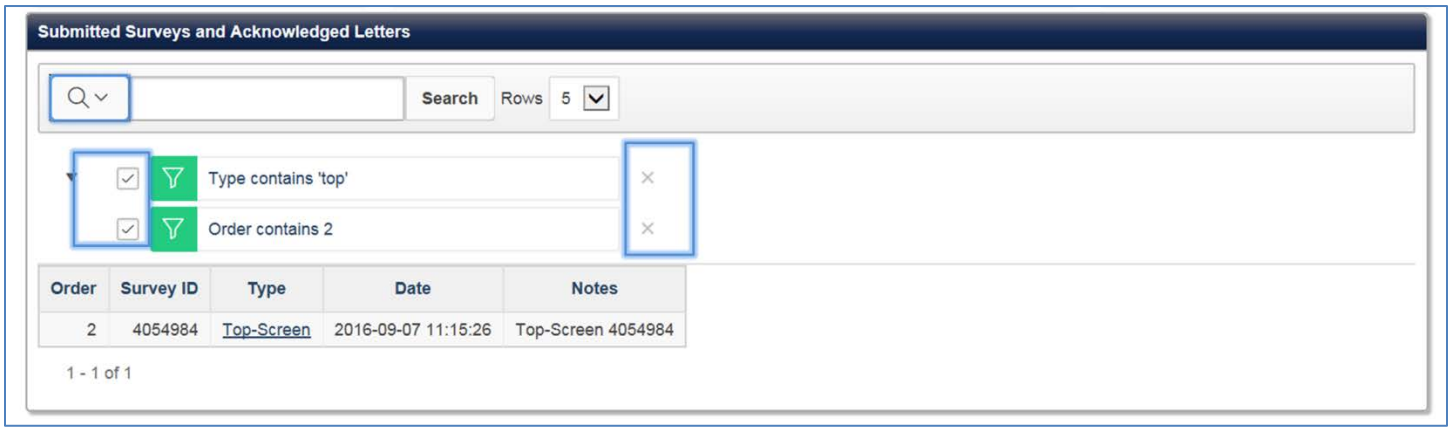


Figure 69: Search Parameters and Filter Results Overview

The table below describes the buttons and features found in the Submitted Surveys and Acknowledged Letters search feature.

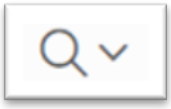
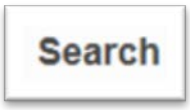
Icon	Name	Function
	Filter	Selects the column to perform a search.
	Search	Performs the search.
	Active search criterion	Shows the checked filter criteria set within the search.
	Inactive search criterion	Shows all the inactive (unchecked) filter criteria.
	Collapse	Collapses the criteria and provides a summary of the active and inactive filters.
	Expand	Expands all the active and inactive criteria used within a search.
	Delete	Deletes a search criteria.
	Activate criterion	Activates a search criterion.
	Deactivate criterion	Deactivates a search criterion.

Table 5: Search Buttons and Features Overview

8.3 Facility Users

The Facility Users section provides a list of all the users and their role access for that facility.

Users with the Authorizer and Administrator role have user management capabilities that allow them to add, change and/or delete users for any CSAT role. See Section 2 for more details about the CSAT roles. A Submitter role can manage Reviewer and Preparer roles.

NOTE Exception: Only an Authorizer can transfer an Authorizer role. See **Section 10** for more details.

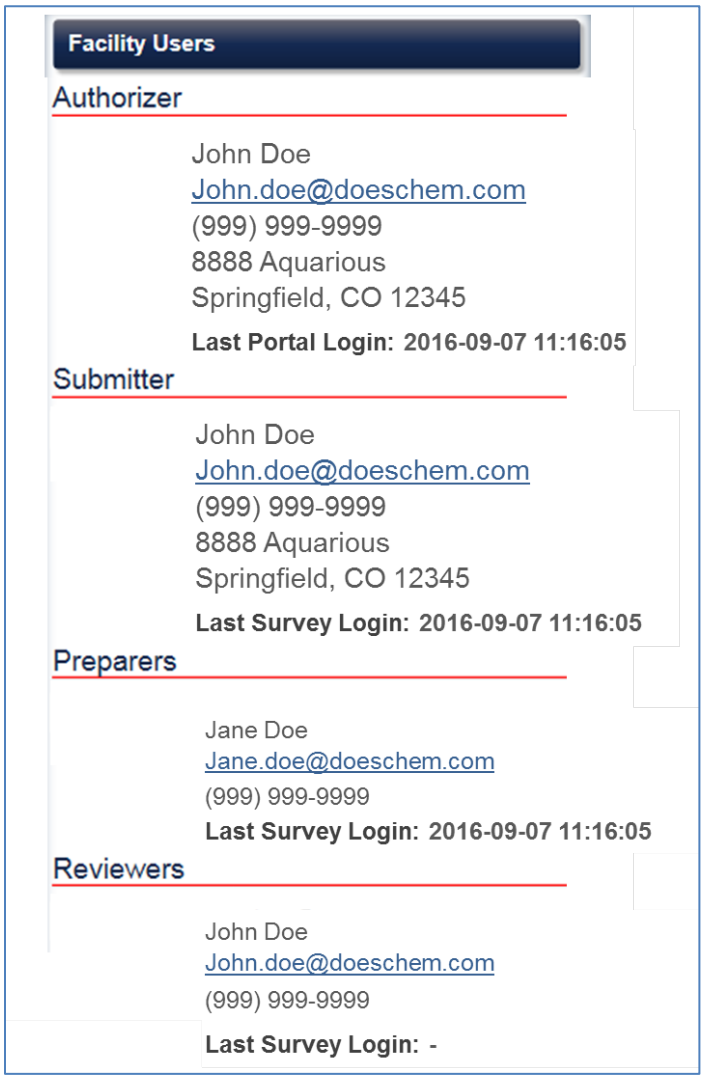


Figure 70: Facility Users Column Provides a List of All Users and Roles with Access to Facility Information

NOTE If your facility has multiple Prepares and/or Reviewers, use the scroll bar to go up and down the list of users.

8.3.1 Change Submitter

This feature is ONLY available for the Authorizer and Administrator roles.

Click the **[Change]** button located below the Submitter title to change the user for this role. Only one Submitter is allowed per facility.

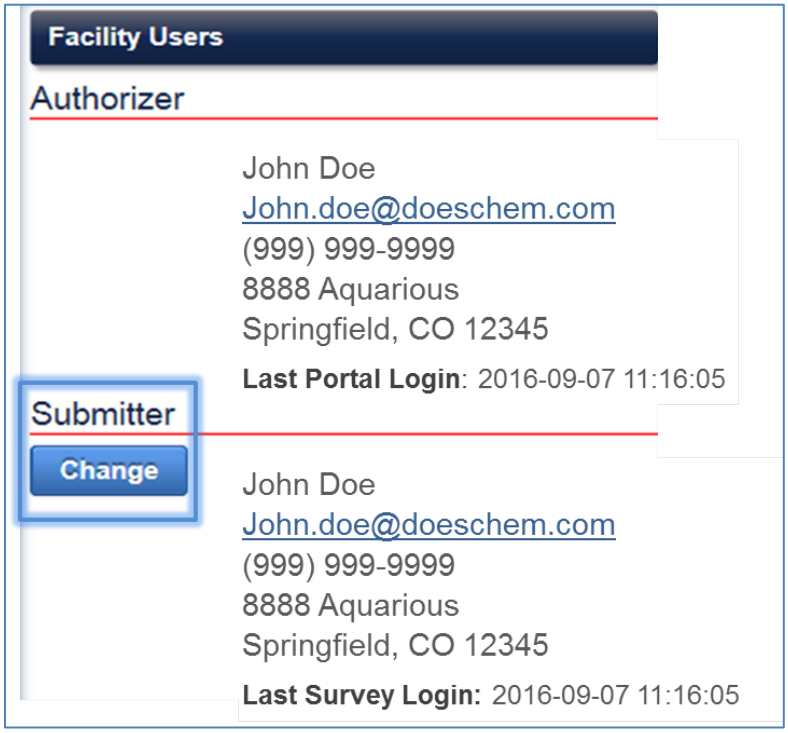


Figure 71: Click the Change Button to Edit

A pop-up window appears so you can search by the name of the user or a drop down list for all the available users.

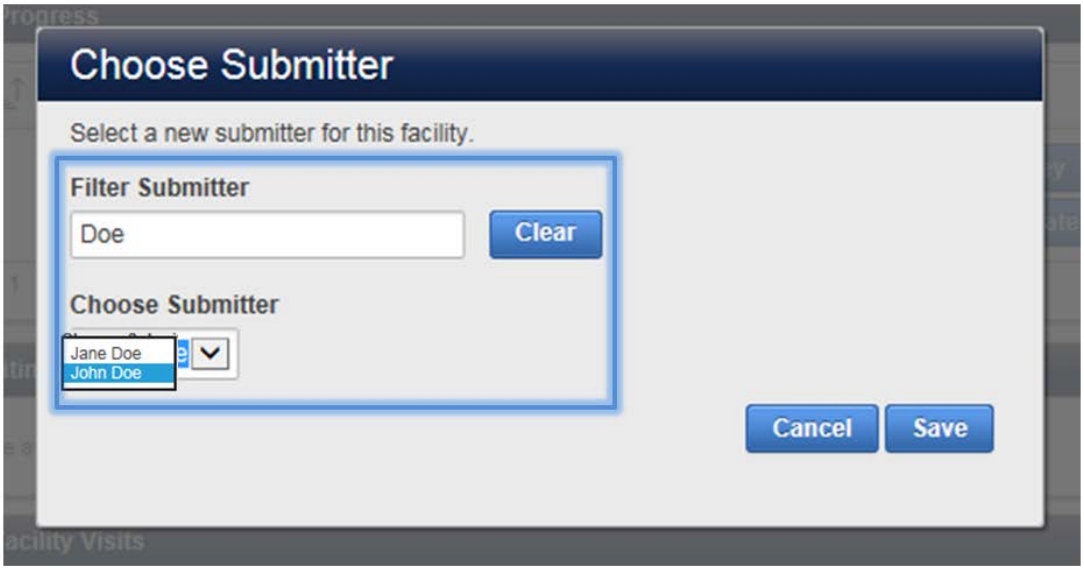


Figure 72: Use the Drop Down Menu to Choose a Submitter

If the drop down list is very long, first refine your search entering the first and/or last name of the user you are searching. Click **[Clear]** button to reset your search.

NOTE If the name of the user does not appear, you must ensure the user is invited and registered to have access to the facility. See **Section 9 – Add user** for more details.

Click the **[Save]** button to save the changes.

Otherwise, click the **[Cancel]** button to return to the Facility Details page.

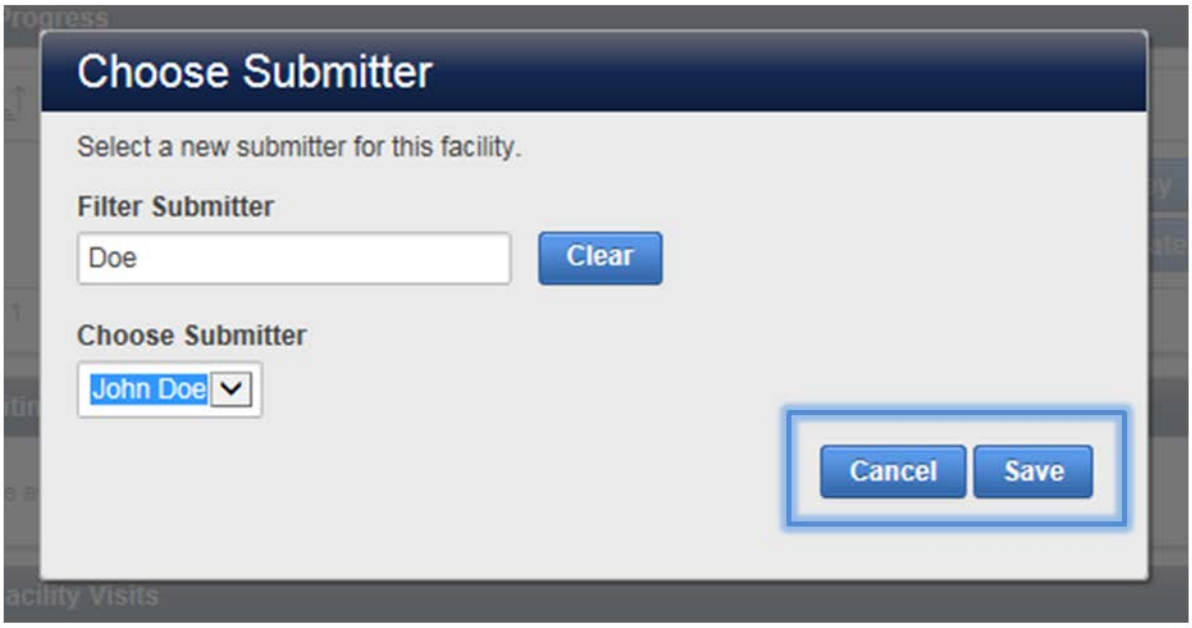


Figure 73: Click Save to Choose a Different Submitter for a Facility

8.3.2 Add / Delete Preparers and/or Reviewers

The feature to manage the Preparers and Reviewers for a facility is available for the following CSAT user roles:

- Authorizer
- Administrator
- Submitter

Click the **[Add/Edit]** button found in the Facility Users column.

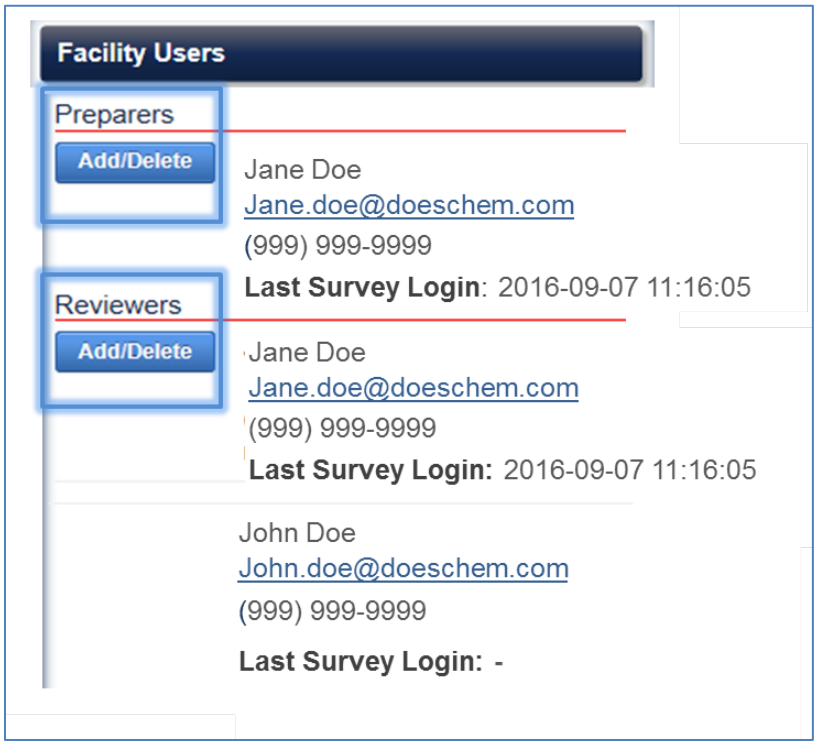


Figure 74: Click the Add/Delete Button to Manage the Facility's Preparers and Reviewers

A pop-up window appears for you to search by the name of the user and select from a list.

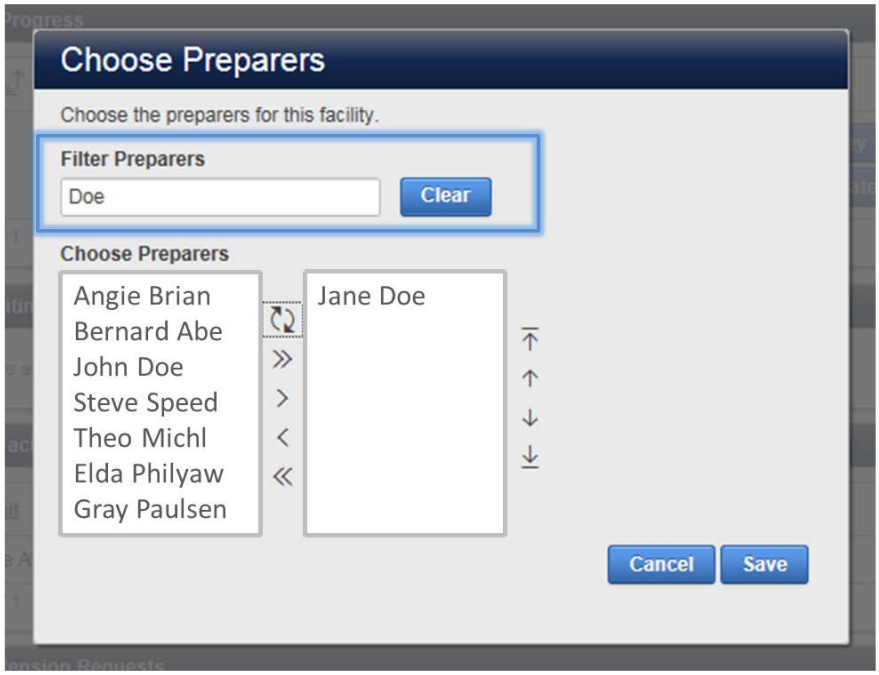


Figure 75: Use the Drop Down Menu to Choose a Preparer

If the drop down list is very long, first refine your search by entering the first and/or last name of the user you are searching. Click **[Clear]** button to reset your search.

NOTE If the name of the user does not appear, you must ensure the user is invited and registered to have access to the facility. See Section 9 – Adding a user for more details.

See Table 6 below for a quick reference of the buttons and their actions on the pop-up window. The table describes the buttons and features for adding/deleting prepares or reviewers.

Icon	Name	Function
	Reset	Resets the names shown in the Choose List.
	Add All	Clears the search criteria and the Results List.

Icon	Name	Function
>	Add	Adds a user to the Selected List.
<	Remove	Removes selected user roles.
«	Remove All	Removes all users from the Selected List.
⤒	Top	Moves the item to the top of the list.
↑	Up	Moves up one name at a time.
↓	Down	Moves down one name at a time.
⤓	Bottom	Moves to the bottom of the list.

Table 6: Add/Delete Reviewers or Prepares Buttons and Features Overview

NOTE When navigating through the system, hover your mouse over an icon/button to see its quick description.

Click on a name to add or delete from the set of preparers. Use the buttons referenced above to add or delete the role.

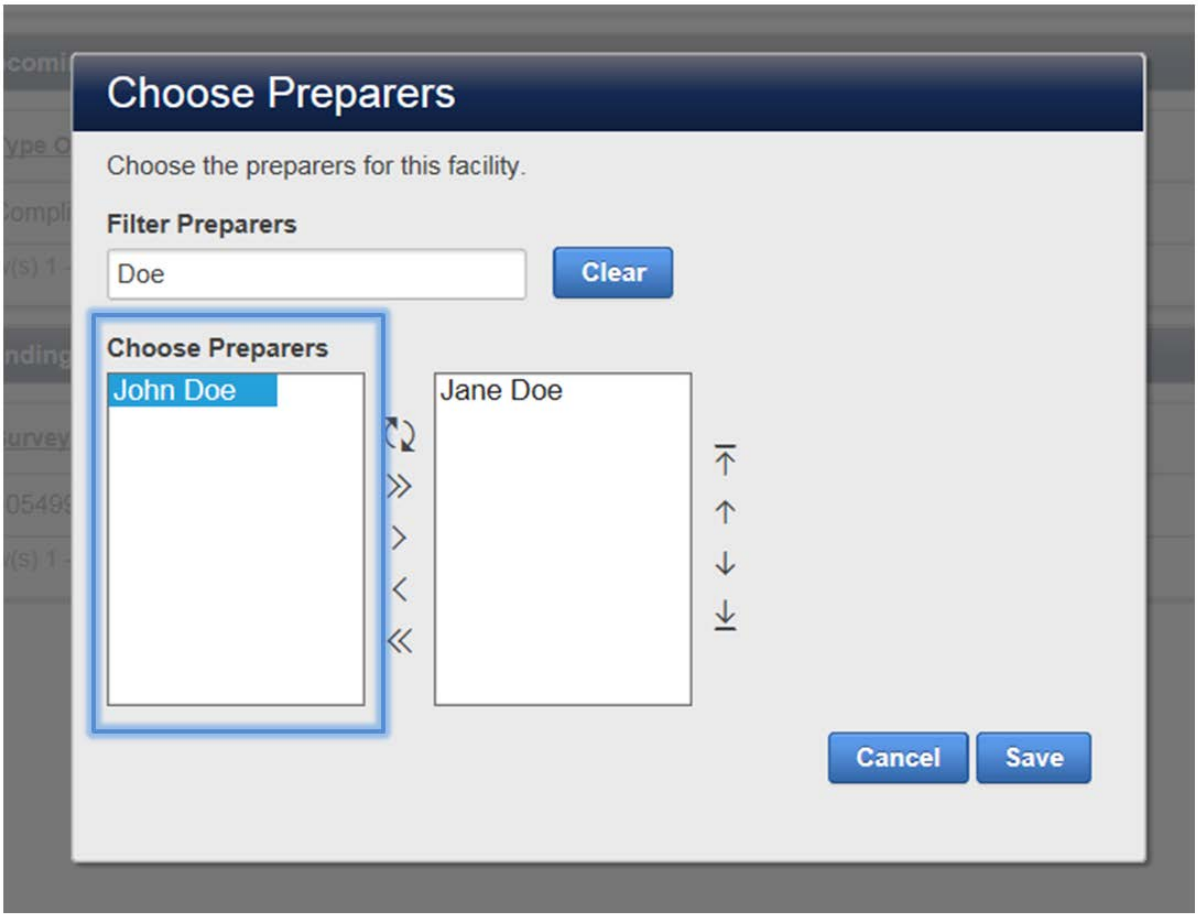


Figure 76: Choose Preparers Sample List

After you have made your selection, click the **[Save]** button to save all the changes.

Otherwise, select **[Cancel]** to return to the Facility Details page.

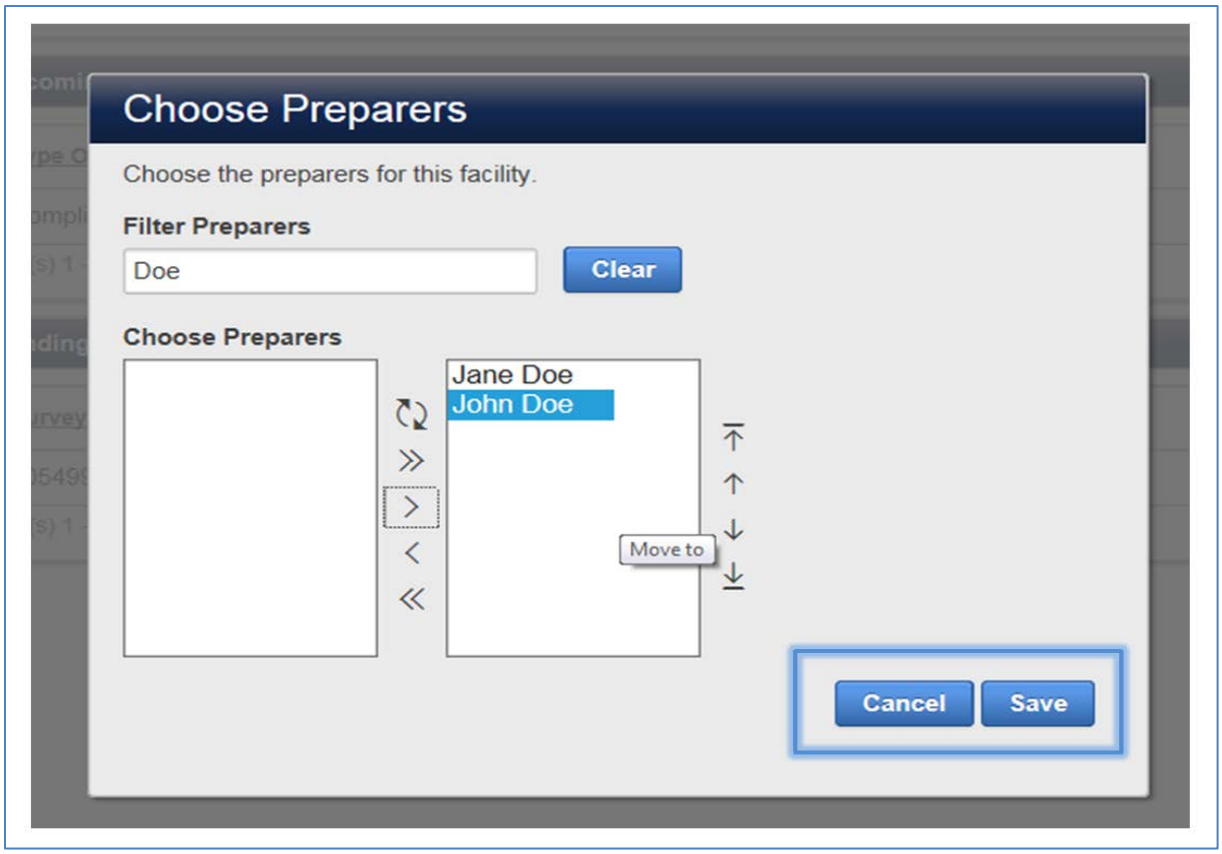


Figure 77: Click Save to Add or Delete Users from a Reviewer or Preparer Role

The new users appear in the list of the role you selected. In the case of the example shown, the new user appears in the Preparer role.

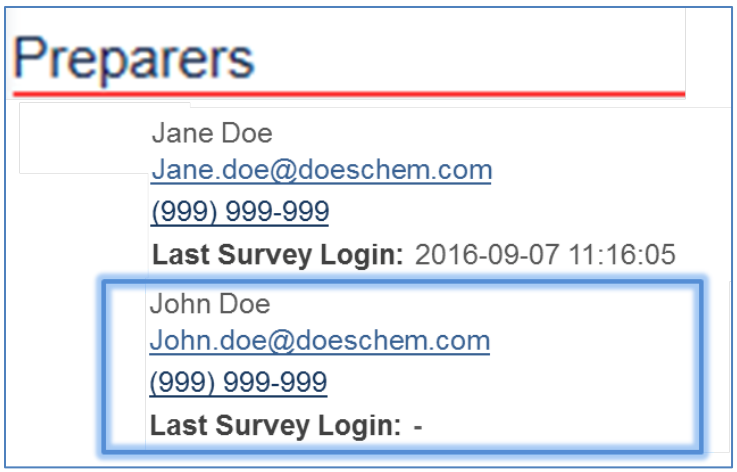


Figure 78: New Users Appear in the Facility Users Column

9. User Management Tab

This section applies ONLY if you have an Authorizer or Administrator role.

These sections describe how an Authorizer or Administrator can search users and view their status, add users by inviting them to register, administer user accounts, including password recovery, and assign Administrator roles.

9.1 Add Users

This feature starts the registration process for a user under the Authorizer purview. The user may be a new CSAT user or an existing user.

Click the **[Add User]** button.

NOTE You must enter a valid email address for the user; otherwise this process cannot be completed.

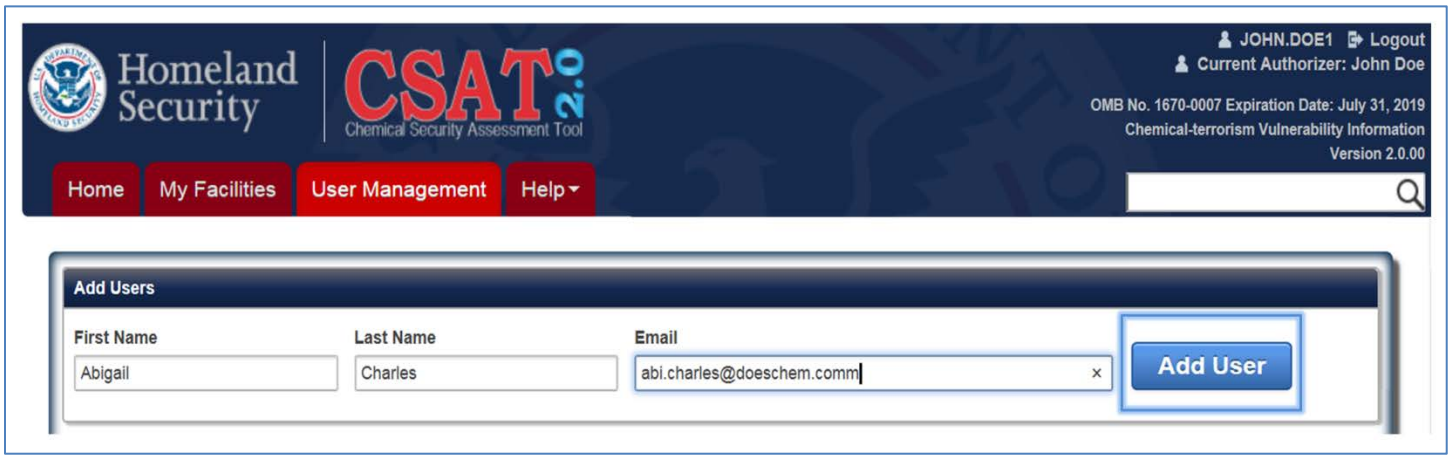


Figure 79: Click Add User to Invite a User to Begin CSAT Registration for a New or Existing Account

The Add Users feature sends automated email notifications containing a unique link and challenge code to a user. The user must have a valid email address to receive the emails and continue with the process of creating an account for the CSAT system for the first time or associating his or her existing account with the Authorizer.

NOTE The challenge code is active for 14 days. See Pending Users (**Section 9.2**) features below for information on resending a new challenge code.

9.2 Pending Users

The Pending User column shows any users that are added but have yet to complete the registration process.

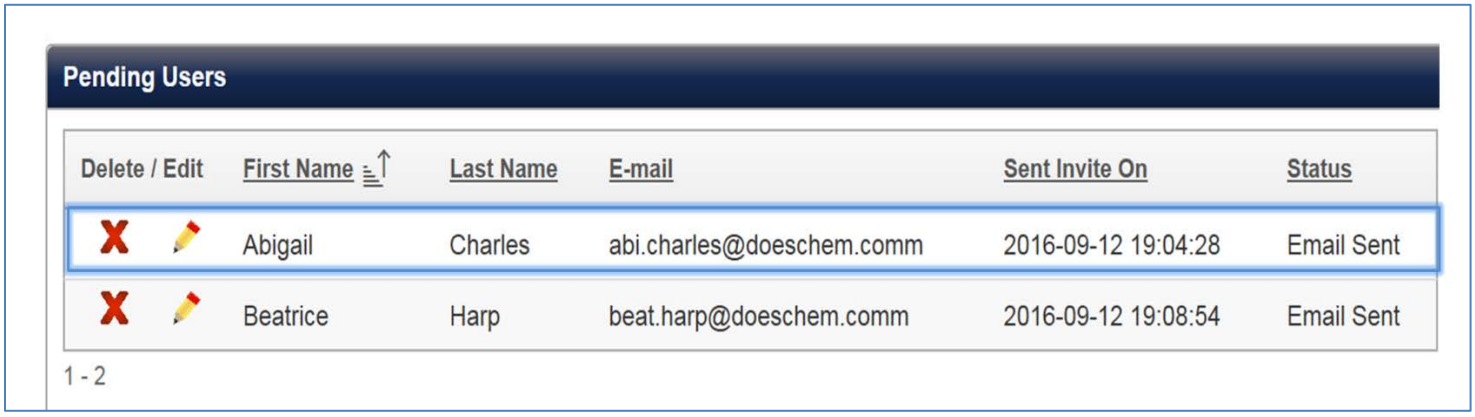


Figure 80: Pending Users Sample Column

NOTE If you have a large list of pending users, use the column sort feature to structure the results within the list.

Delete a Pending User

You can delete a pending user while the invite is displayed in the Pending Users list.

Click the X **[Delete]** icon to delete the pending user invite. A pop-window confirming the cancelation of the request appears.

Click **[Confirm Delete]** to delete. The challenge code sent to the user becomes invalid immediately.

Click **[Cancel]** to return to the Pending Users list.

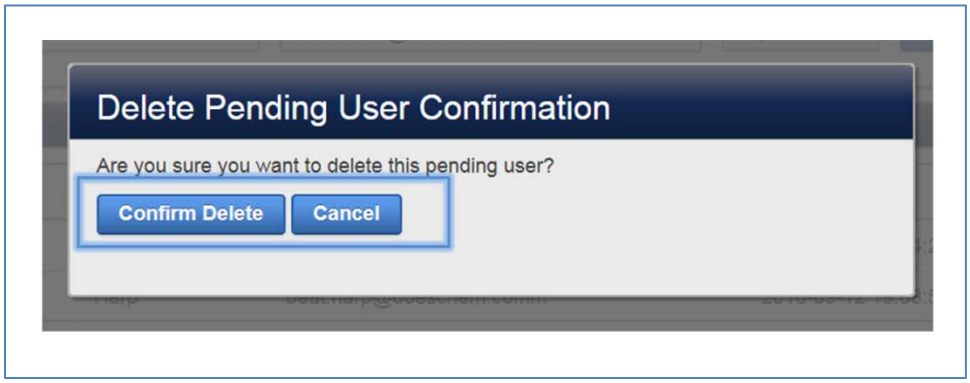


Figure 81: Confirm Delete Removes the Pending User

Edit a Pending User

You can edit a pending user while the invite is still awaiting and showing in the Pending Users list.

Click the **[Edit]** icon to edit a user. The Delete/Edit Users web form appears. You can edit the name and email of the user.

Click the **[Update]** button when you are finished with any updates in the first, last name, or email of the user. The update button is disabled (grayed out) until you make an edit to the user information.

Click the **[Resend Invite]** button to resend the challenge code to the user. This is required if the challenge code is deactivated prior to the user accepting the invitation.

Click the **[Cancel]** button to cancel any actions and close the edit web form.

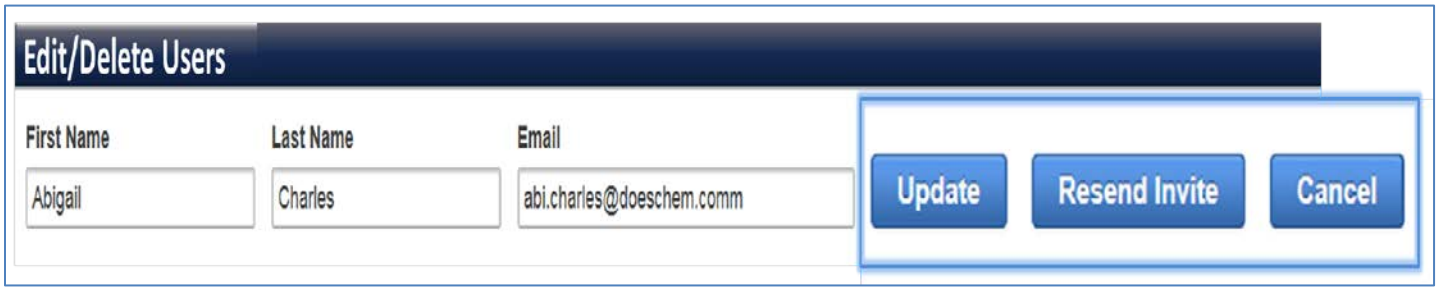


Figure 82: Overview of the Edit/Delete Users Web Form

9.3 Search Users

Enter part of a first or last name you want to search and click the **[Filter]** button. You can change the amount of rows displayed by clicking on the row drop down option.

Click the **[Reset]** button to restart your search.

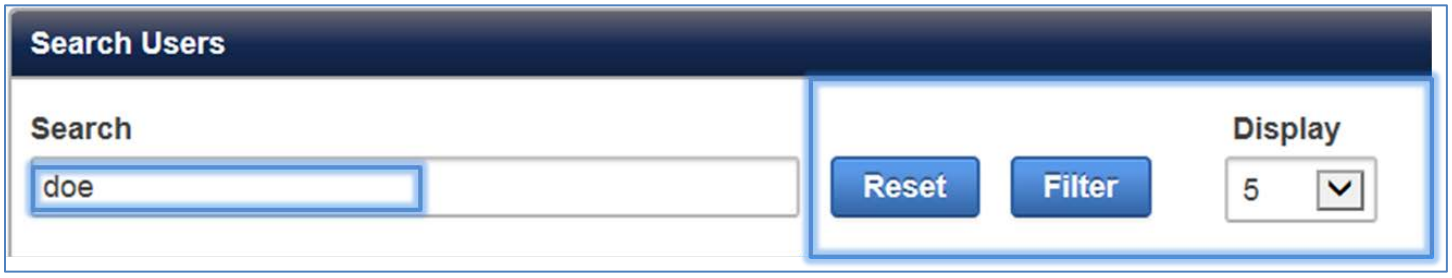


Figure 83: Search Users Features Overview

The results are displayed in the Users list. See Section 9.4 below for more information.

9.4 Users

The Users column lists all the CSAT users under your purview.

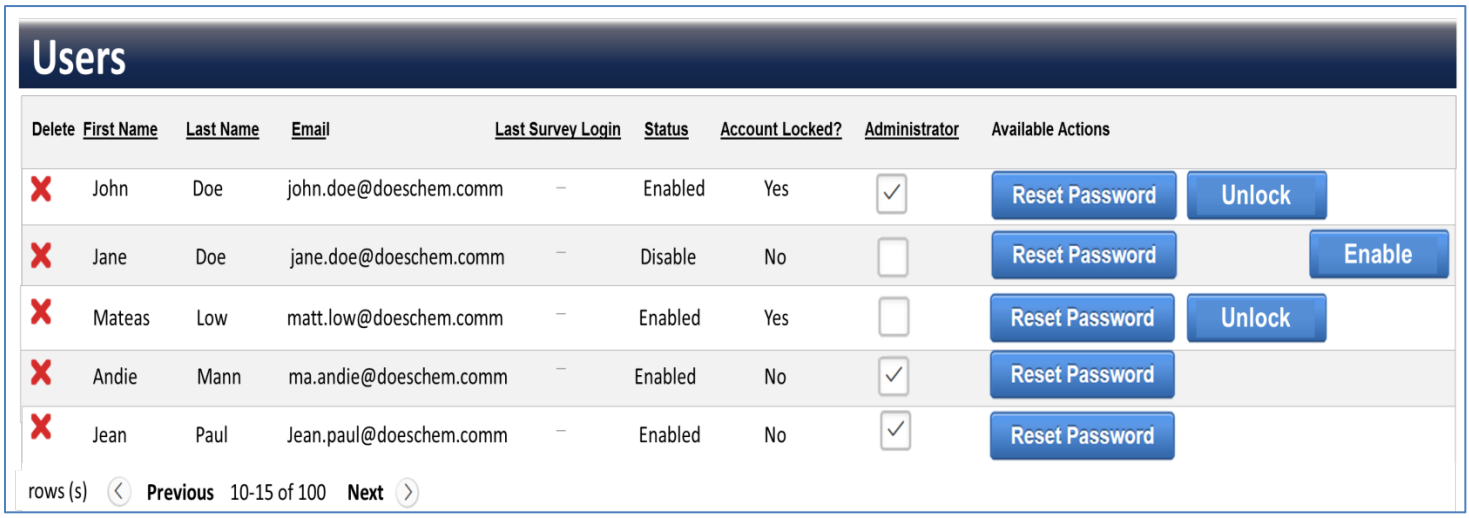


Figure 84: Users List Features and Buttons Overview

9.4.1 Administrator

You can easily make a user an Administrator to assist with facility and user management activities. See CSAT Roles (Section 2) for more details regarding the Administrator role.

Check the **[Administrator checkbox]** for the user to receive administrator rights to CSAT.

Uncheck the checkbox to remove administration rights from the user.

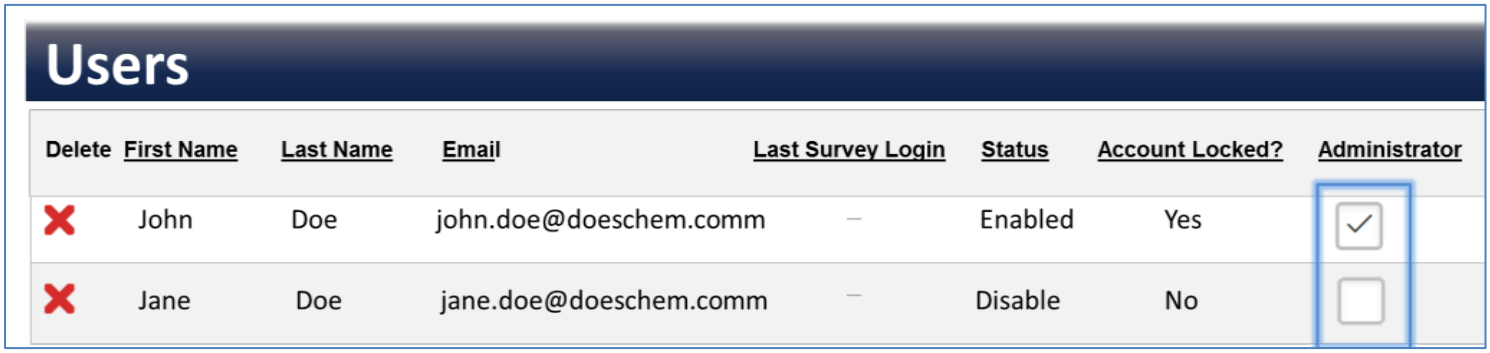


Figure 85: Administrator Rights are Managed by Checking or Unchecking the User Box

9.4.2 Available Actions

This section describes the available actions.

Reset Password and/or Unlock Account

NOTE You can Reset a Password for a user at any time.

If a user forgets his/her password, you can reset their password at any time by clicking the **[Reset Password]** button next to the user. The CSAT system sends an email to the user with the new password. The user can change the password after accessing their account by going to My Account (see Section 10).

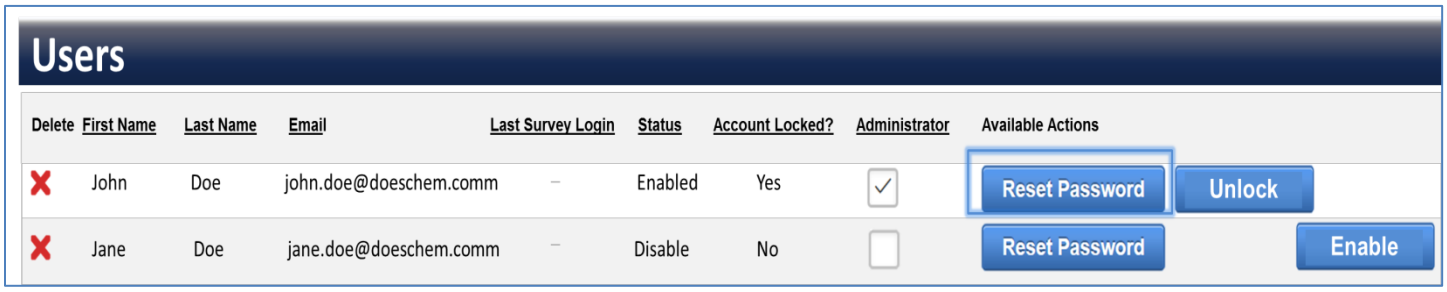


Figure 86: Use the Reset Password Button to Send an Automated New Password to a User

After three (3) unsuccessful logon attempts a user's account is automatically locked by the system. Use the **[Reset Password]** button to unlock the user's account and reset the user's password, or use the **[Unlock]** button if you want to unlock the account without resetting the password. If you only unlock the account, the user must use their current password.

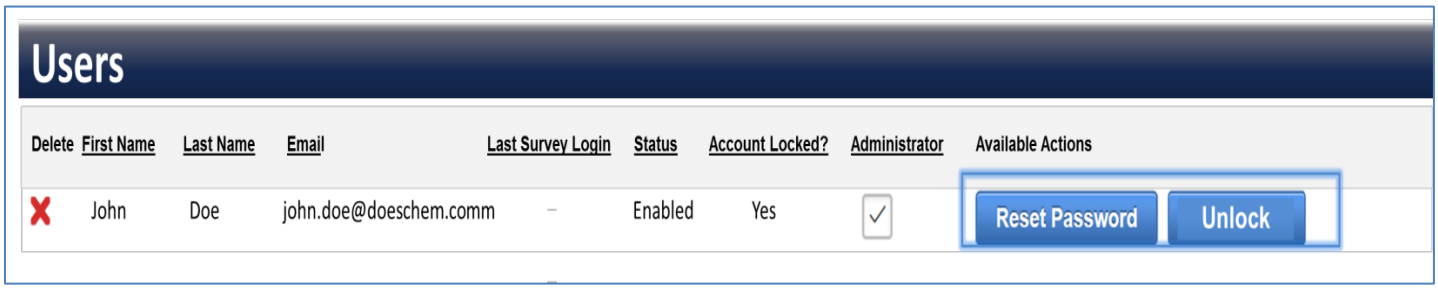


Figure 87: Click the Reset Password to Unlock a User's Account

Enable

NOTE This feature is only available for users whose account has been disabled.

If the user does not log into the CSAT system within a 90-day period then the account is automatically disabled. Click the **[Enable]** button to re-enable their account. The CSAT system automatically generates and sends an email to the user with login information.

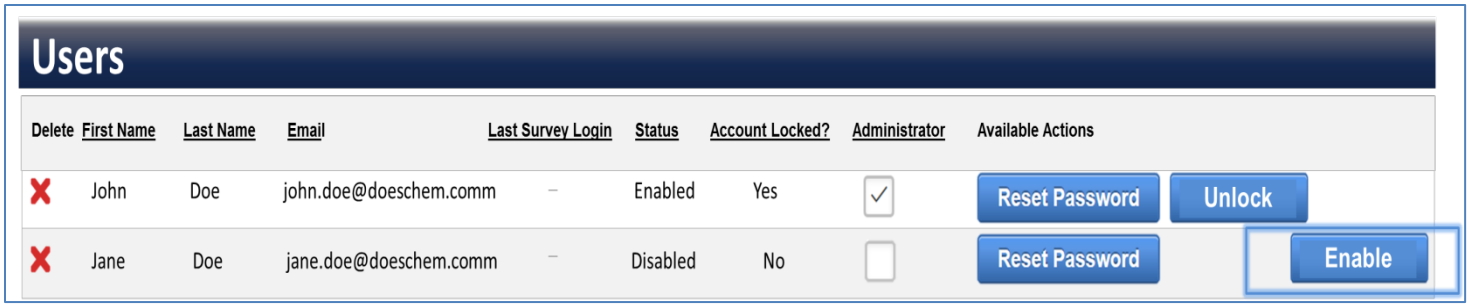


Figure 88: Click the Enable Button to Restore a Disabled CSAT User Account

NOTE If you experience problems logging into CSAT you can contact your Authorizer, Administrator, or the CSAT Help Desk.

10. Manage my Account

You can access your account information at any time while logged onto the CSAT Portal.

Click your **user name** located on the top right of the banner.

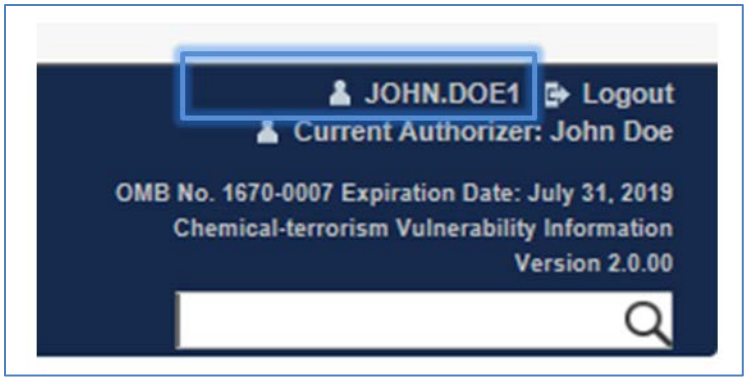


Figure 89: Click on Your User Name to Access Your Account

You can update your information and change your password at any time while you are logged onto the CSAT Portal.

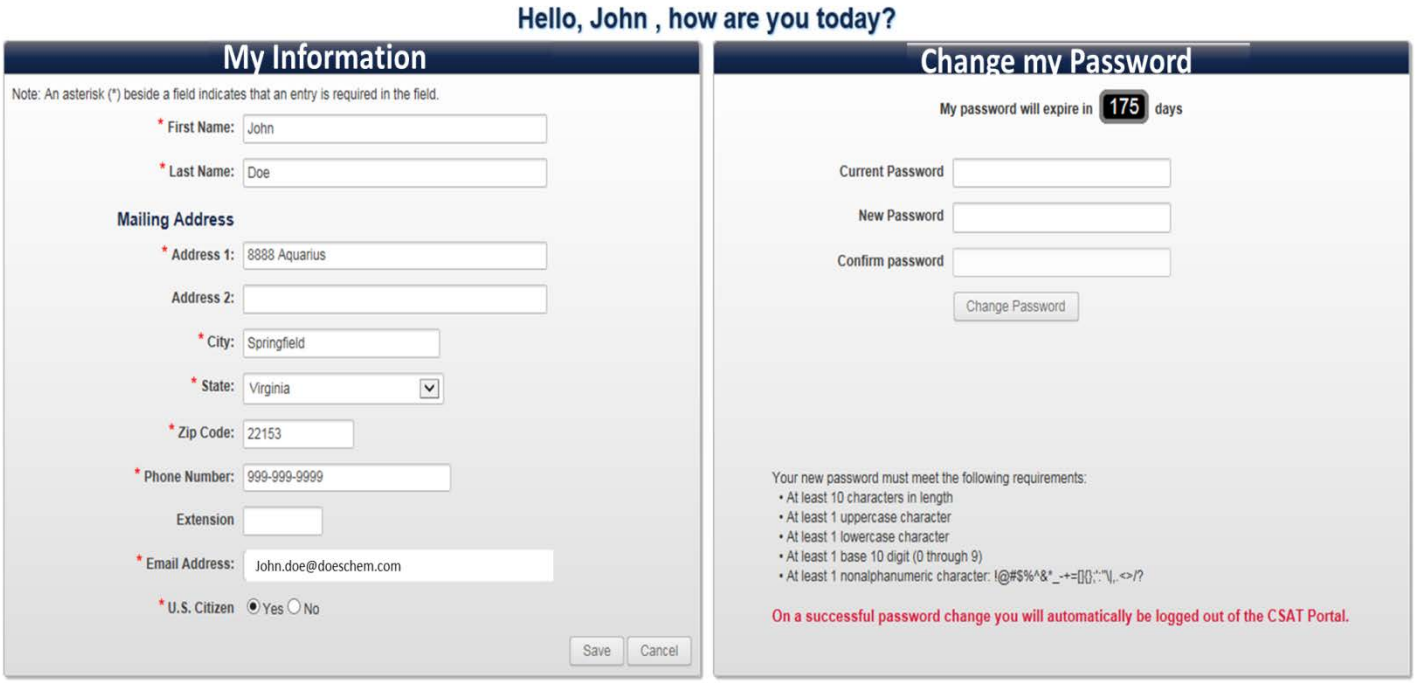


Figure 90: My Account Overview

10.1 Edit my information

Begin typing in any of the fields that you would like to change or update. The **[Save]** and **[Cancel]** buttons automatically become enabled.

Click the **[Save]** button to save all your changes.

Click the **[Cancel]** button to discard your changes. The buttons are greyed out and no changes are saved.

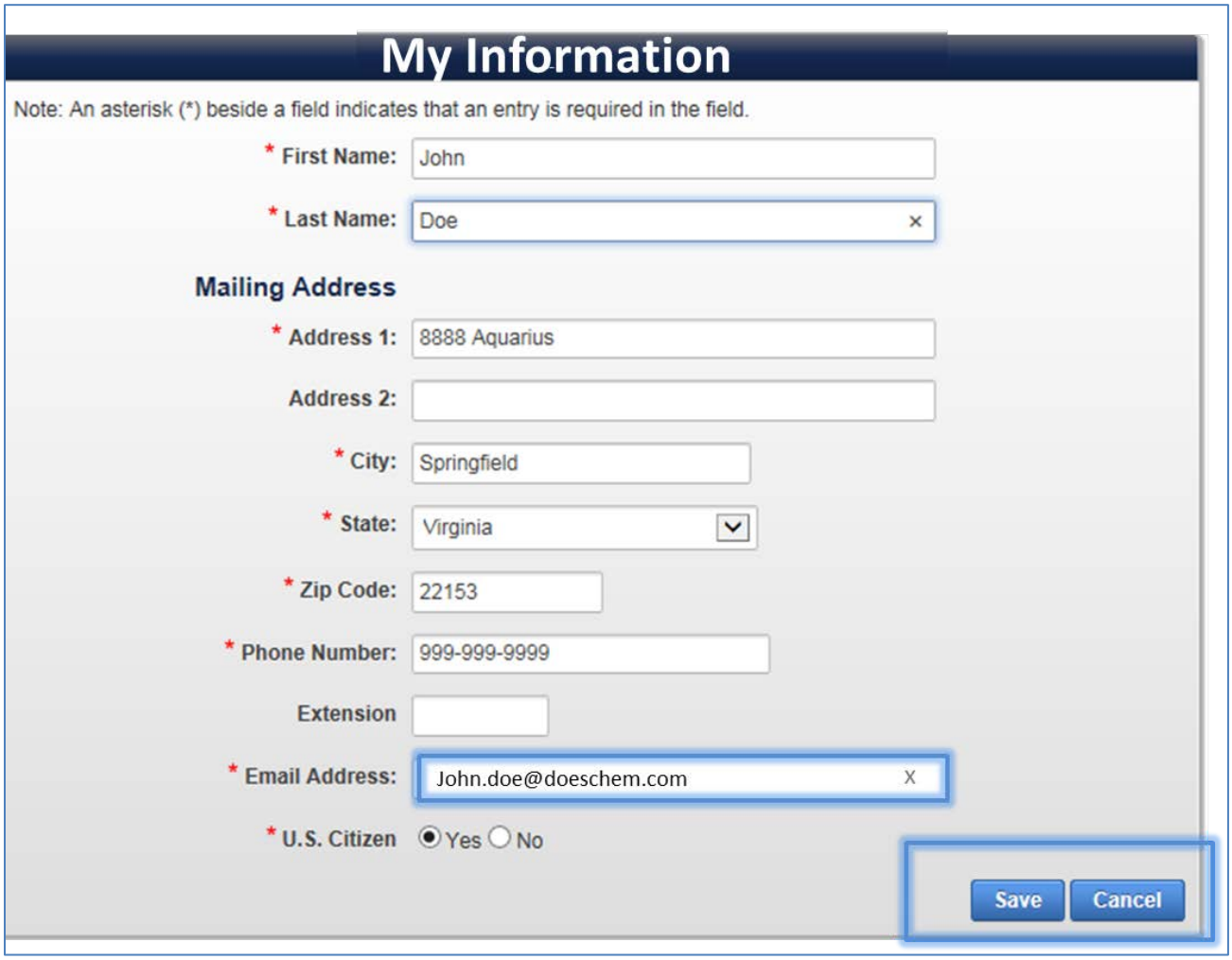


Figure 91: Click Save to Complete Your Account Information Changes

10.2 Change Password

In order to protect your personal and facility information, your password must be changed every 180 days. The CSAT system begins reminding you that your password must be changed within 15 days of its expiration. If your password expires, your Administrator or Authorizer can reset your password, or you can call the CSAT Help Desk. If you are an Authorizer or Administrator, see Section 9 for instructions to reset a user password.

You may change your password at any time. Your new password must meet the criteria listed in Figure 92 for it to be accepted.

Enter your current password and your new password. You must confirm and match the new password. If all the requirements are correct the **[Change Password]** button becomes enabled.

Click the [**Change Password]** button to complete the change. You are automatically logged out of the CSAT Portal. You must use your new password to sign in. Your password expiration is reset to 180 days.

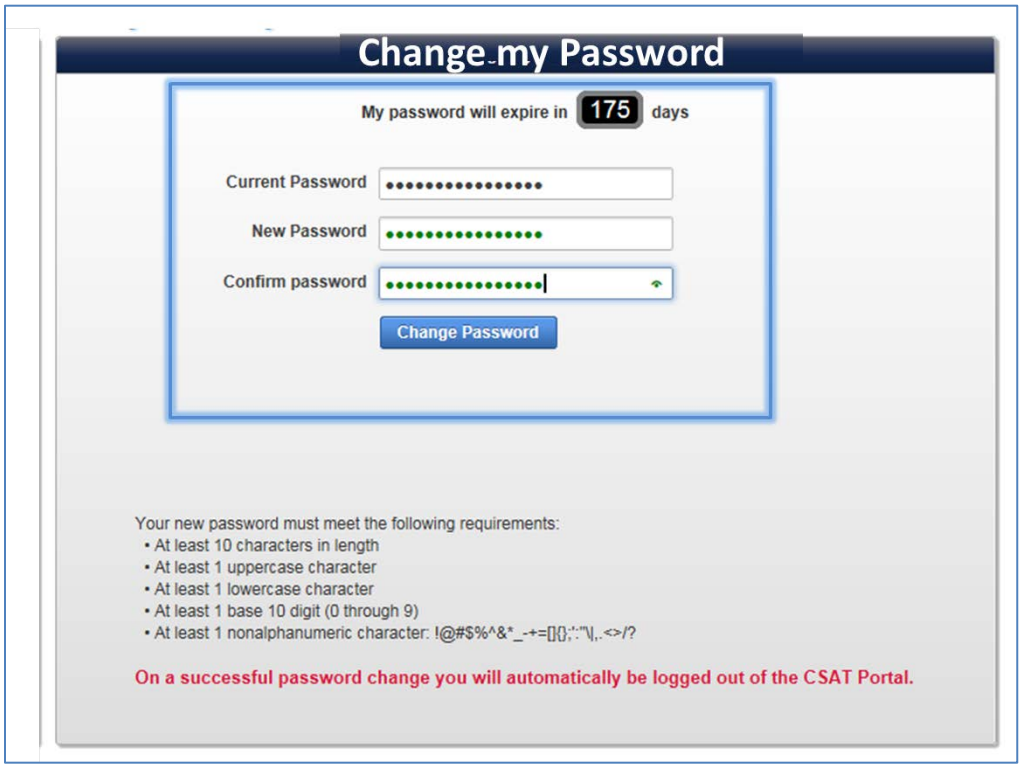


Figure 92: Enter Your Current, New, and Confirmed Password for the Change Password to be Enabled

NOTE For security purposes, your password is not displayed while you are typing. Instead you see a red dot for each character you type. While typing your new password, the system turns the dots to green when you have met all requirements for a valid password.

10.3 Transfer Authorizer Role

This section applies ONLY if you have an Authorizer or Administrator role.

Click the **[Transfer Authorizer Role]** button located at the bottom left corner of Manage My Account page to begin the role transfer request process.

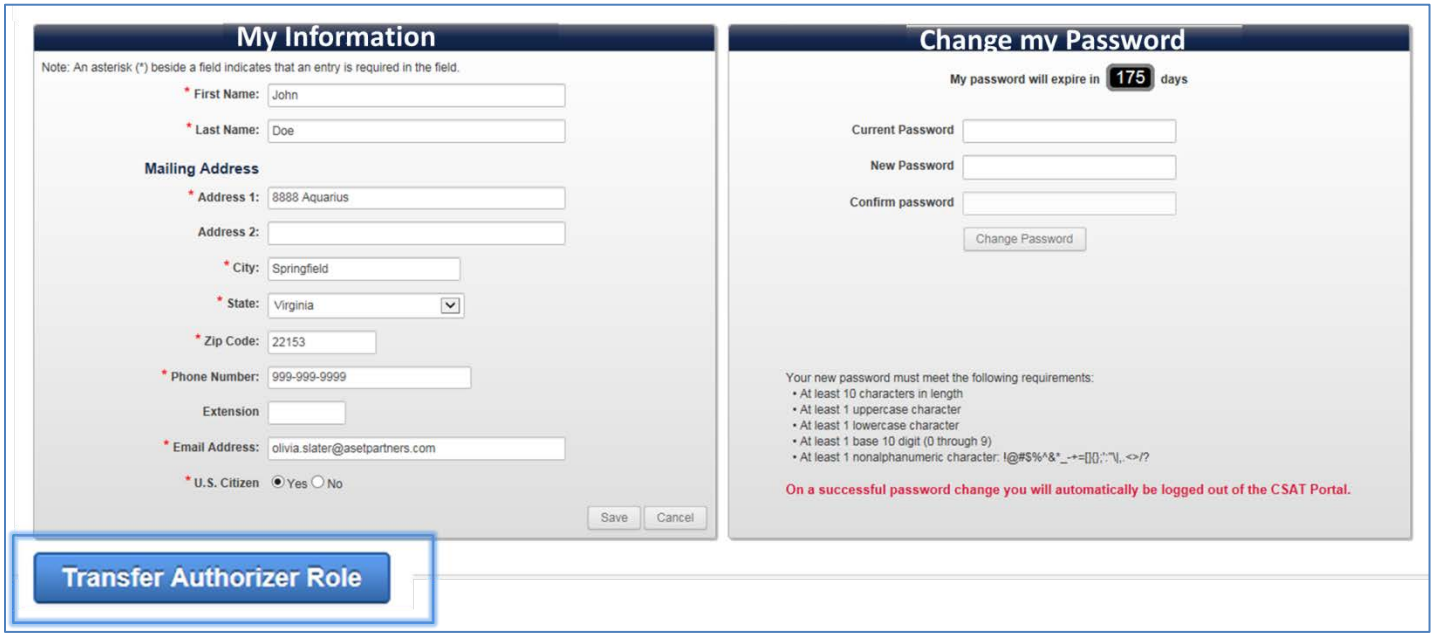


Figure 93: Click Transfer Authorizer Role to Begin the Transfer of Facilities to Another User

A Transfer Authorizer Role web form appears. You must answer all the required fields, including first name, last name, and a valid email.

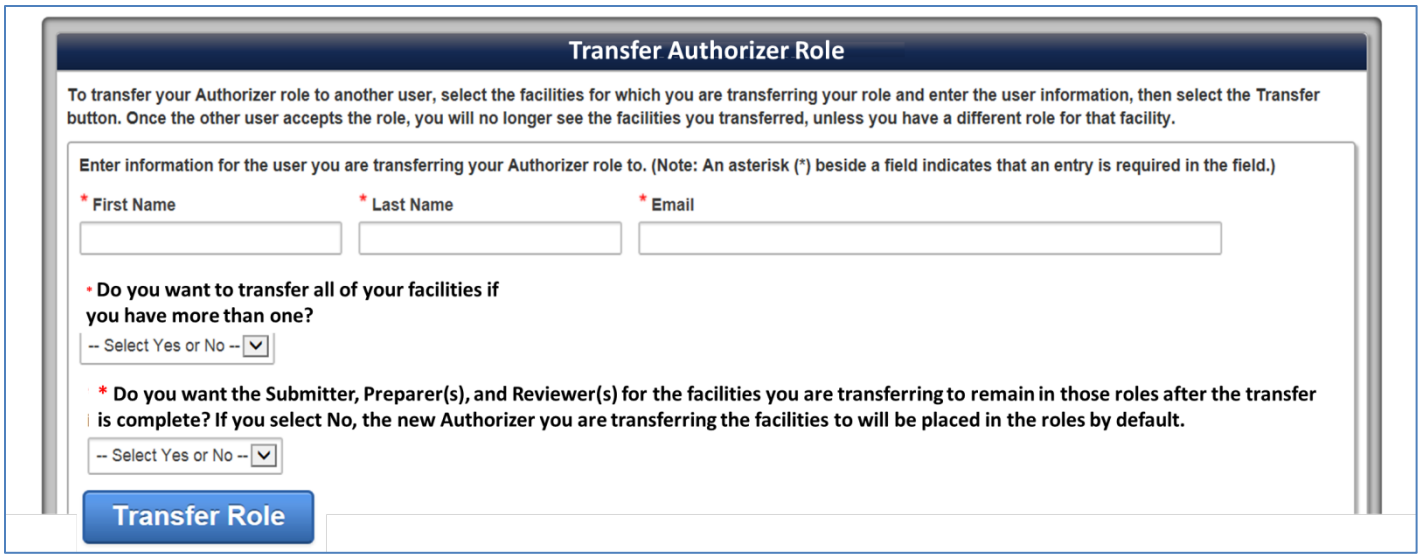


Figure 94: Sample of Required Fields in the Transfer Authorizer Request Form

Select Yes, for question "Do you want the Submitter, Preparer(s), and Reviewer(s) for the facilities you are transferring to remain in those roles after the transfer is complete?" if you want to transfer all the existing roles associated with the facility.

Otherwise select **No**, and the new Authorizer you are transferring the facilities to will be given the Submitter role for those facilities by default. The new Authorizer can manage the roles by using the features found in Facility Details and/or User Management.

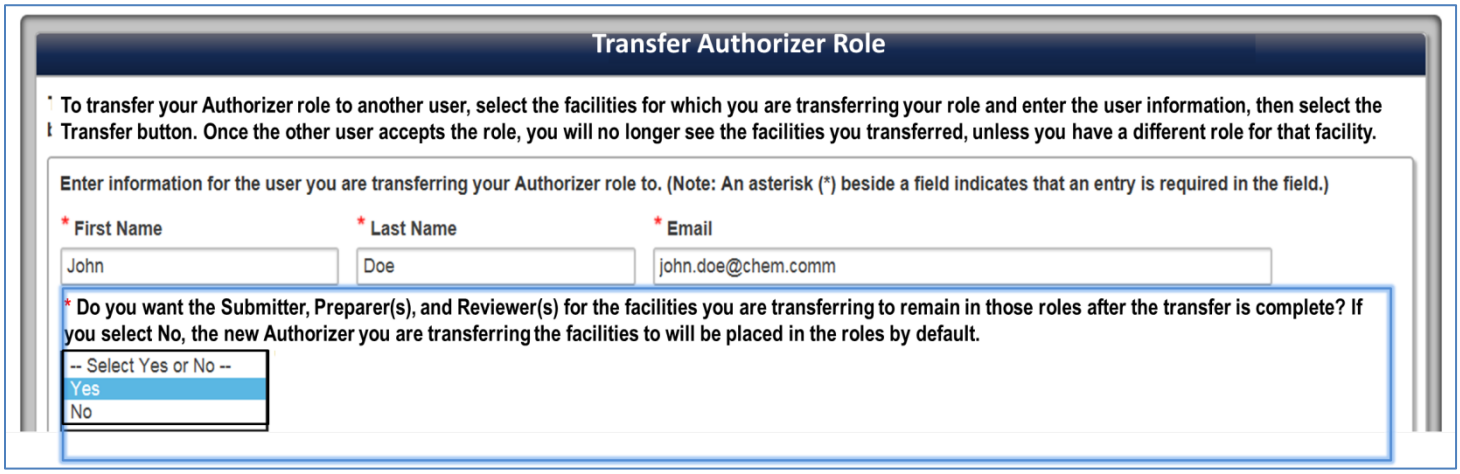


Figure 95: Existing User Roles Transferred Using the Authorizer Role Transfer Feature

Select Facilities to transfer

If you are an Authorizer for multiple facilities you can transfer one or more facilities to another user.

The question ***"*Do you want to transfer all your facilities if you have more than one?"*** is hidden if you are an Authorizer for only one facility.

Select **Yes** from the drop down if you want to transfer ***ALL*** the facilities to another user at once. Otherwise, select **No.**

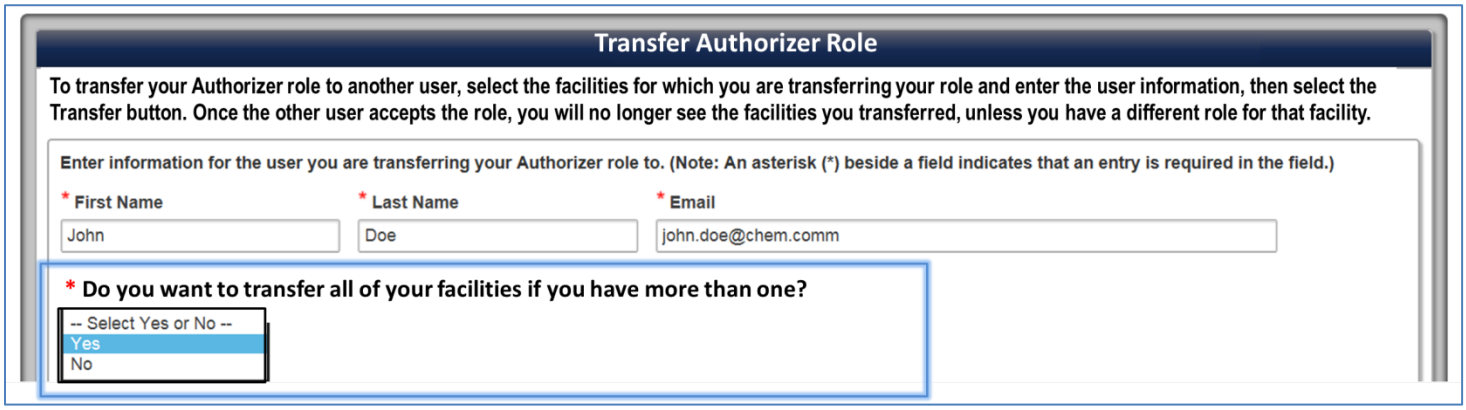


Figure 96: Select Yes or No to Transfer All Facilities (For an Authorizer for Multiple Facilities)

If you are not transferring all your facilities, **check** the box for the facilities you want to transfer.

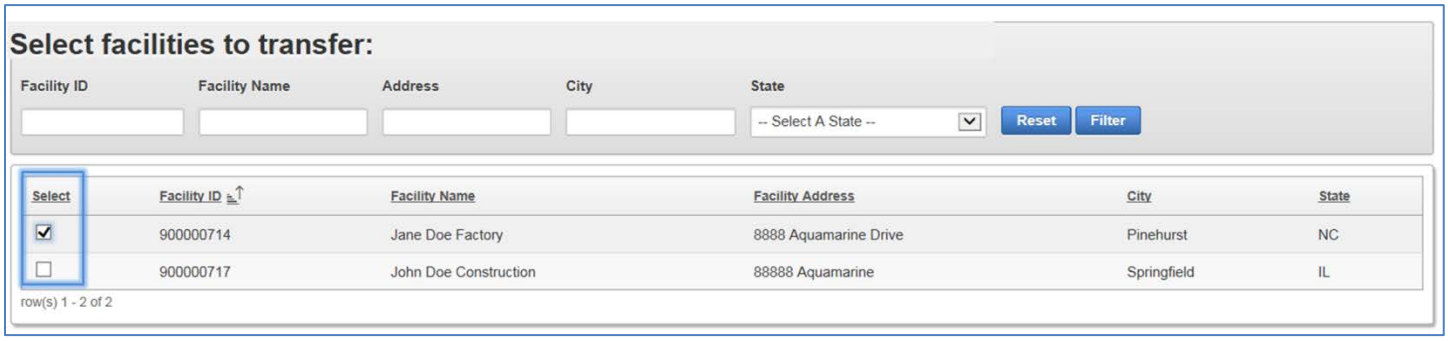


Figure 97: Check Box for the Facilities One at a Time Feature

To refine your search, enter keywords to search by a field. Click the **[Filter]** button to refine the search. Click the **[Reset]** button to restart your search.

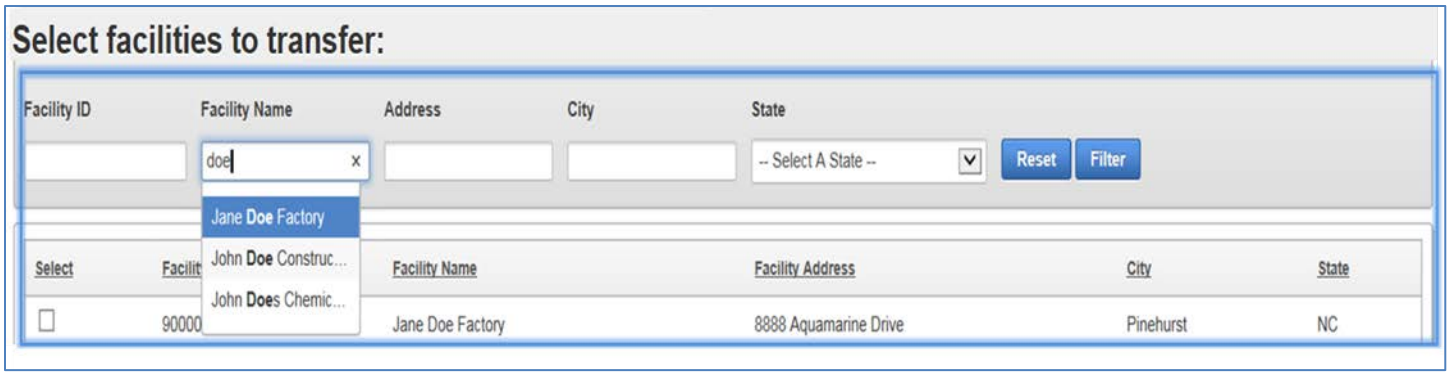


Figure 98: Use the Filter Options to Refine the Facility List

NOTE You cannot transfer any pending facilities until they are approved by DHS.

Click the **[Transfer Role]** to complete the transfer request.

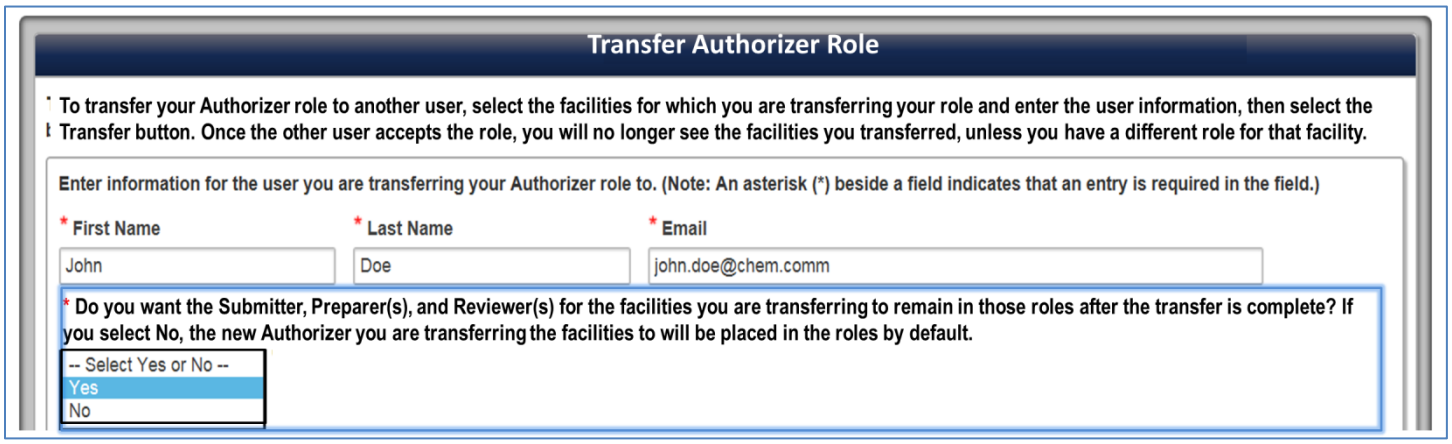


Figure 99: Click Transfer Role to Complete the Authorizer Transfer Request

Select the **[Confirm Transfer]** button to complete the transfer request.

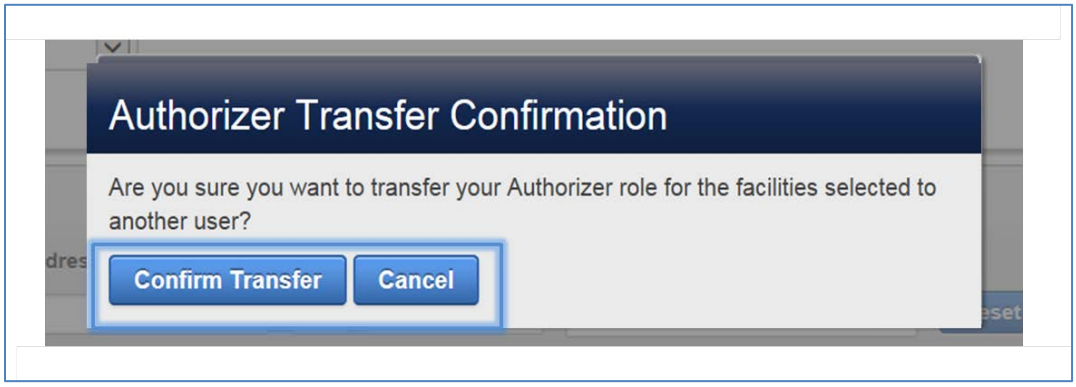


Figure 100: Confirm Transfer to Complete the Authorizer Transfer Role

NOTE The new Authorizer receives automated CSAT email notifications, including a challenge code, to complete the transfer process. The new Authorizer has 14 days to complete the request.

Pending Transfers

The pending request for an Authorizer role transfer is displayed in the Pending Facility Transfers list on the same page with Transfer Authorizer role.

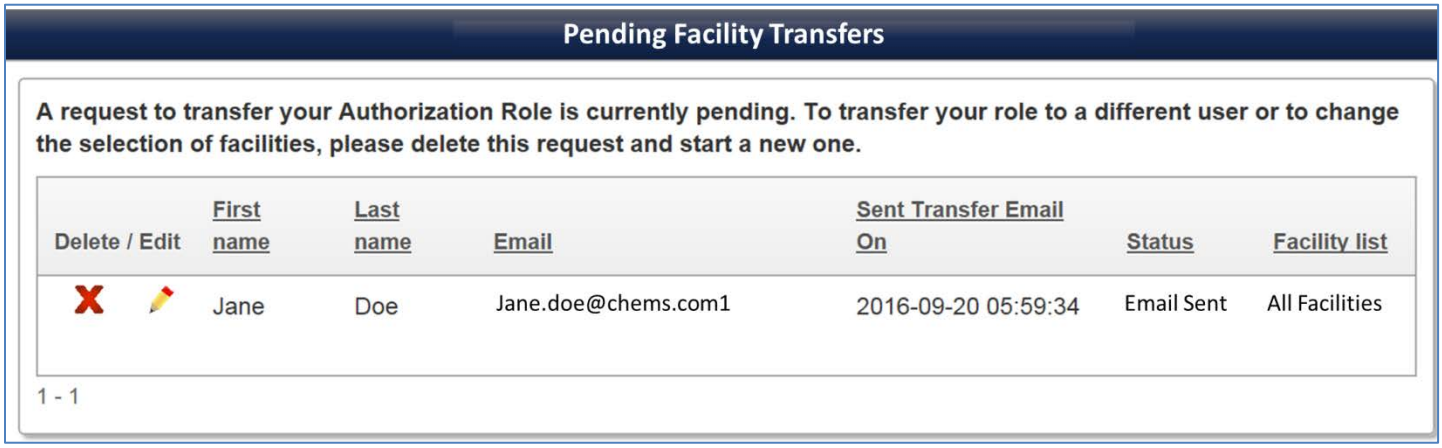


Figure 101: Completed Transfer Authorizer Request Appears Pending until the New Authorizer Accepts the Request

Edit Pending Transfer

You can edit a pending authorizer role transfer while the request is still pending.

NOTE To resend a request to an Authorizer, follow the edit pending transfer instructions.

Click the **[Edit]** icon to resend the request.

Edit Request Transfer form appears. You can edit the name and email of the user.

Click the **[Update]** button when you are finished with any updates in the first, last name, or email of the user. The update button is disabled (greyed out) until you make an edit to the user information.

Click the **[Resend Invite]** button to resend the challenge code to the user. This is required if the challenge code is deactivated prior to the user accepting the transfer.

Click the **[Cancel]** button to cancel any actions and close the Edit Pending Transfers web form.

Figure 102: Edit Pending Transfers Web Form

Cancel Role Transfer

You may cancel a pending Authorizer role transfer while the request is still pending.

Click the X **[Delete]** icon to cancel the request. A pop-window confirming the cancelation of the request appears.

Click **[Confirm Delete]** to stop the role transfer to another Authorizer user. The challenge code sent to the user deactivates immediately.

Click **[Cancel]** to return to the Pending Transfers.

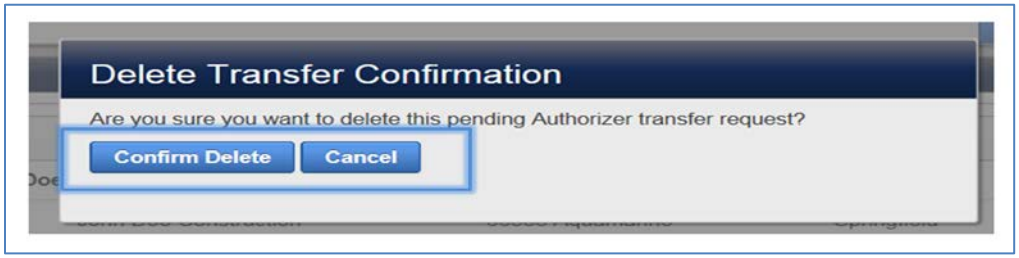


Figure 103: Confirm Delete Stops the Authorizer Transfer Role Process

10.4 Change Current Authorizer

This section applies ONLY if you work for Multiple Authorizers.

You can quickly switch from one Authorizer purview to another at any time while logged onto the CSAT Portal.

Click the **[Current Authorizer]** link located at the top right corner of the header.

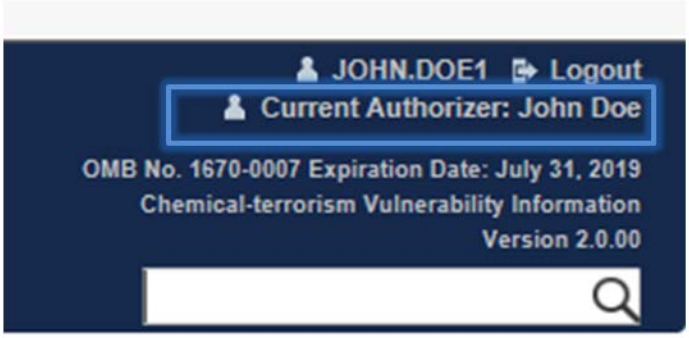


Figure 104: Click the Current Authorizer Link to Change Authorizer [Only for Users Associated with Multiple Authorizers]

Click the drop down list with the list of Authorizers. Select the user name.

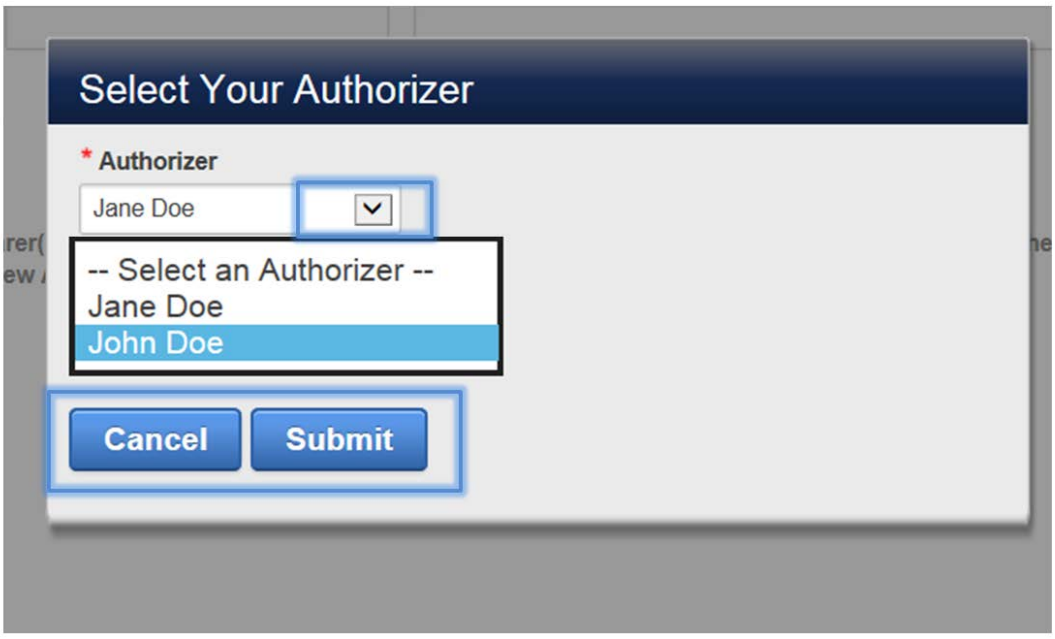


Figure 105: Select the Authorizer Name and Click Submit to Change the Authorizer Purview

Click the **[Submit]** button to switch to the selected Authorizer's purview of facilities.

Click the **[Cancel]** button to remain within the Authorizer purview you selected when you initially logged in.

11. Personnel Surety Program

The Personnel Surety Program tab is only available for CSAT users who have access to the program.

See the DHS CSAT Personnel Surety Program web page for more details.

Click the **[Personnel Surety Program]** tab to navigate to the CSAT Personnel Surety Program Application.

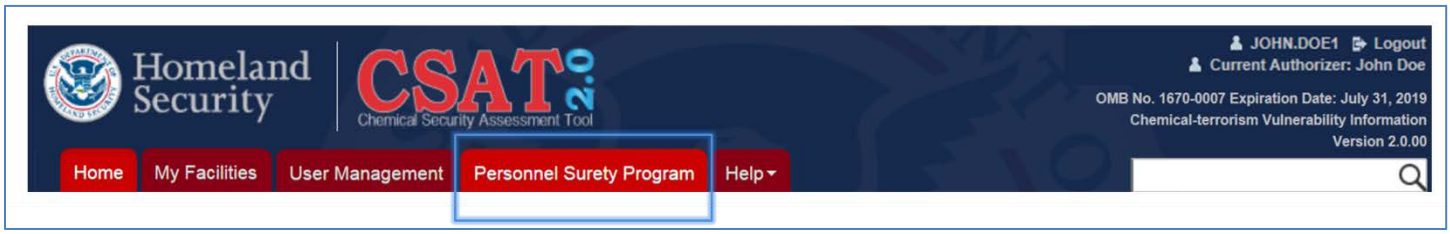


Figure 106: Personnel Surety Program Tab Navigates Users with Access to the Application

12. Help

You can use the **Help** tab to locate links for useful information.

Click the **[Help]** tab to get the list of available help links. Select and click on a link.

A separate window browser tab opens with the information.

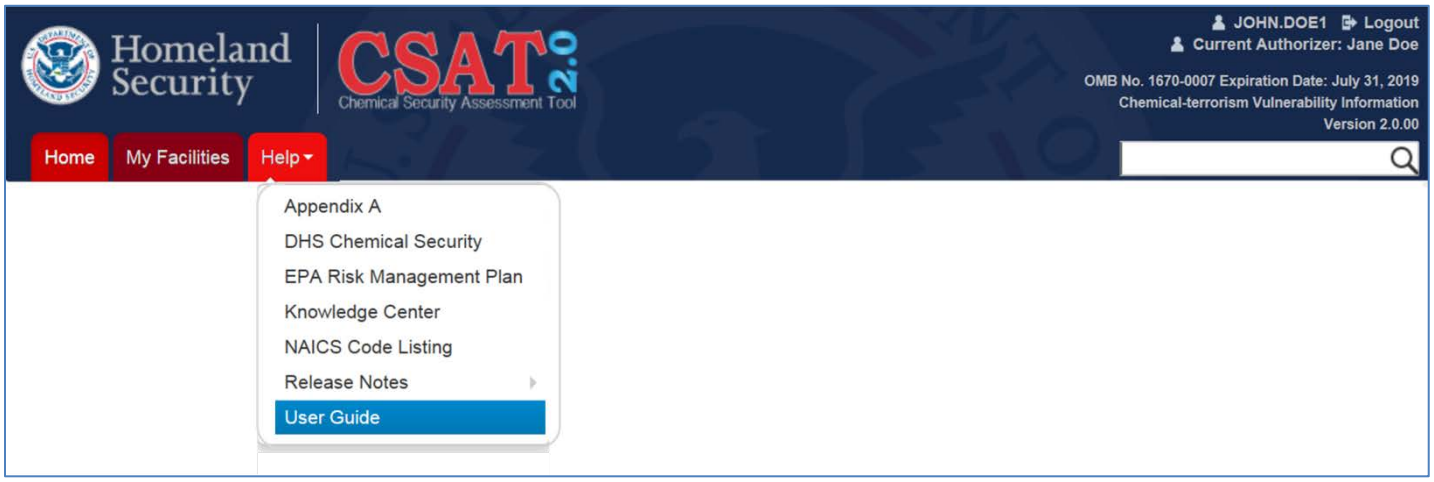


Figure 107: Help Tab Overview

12.1 Contacting the CSAT Help Desk

CSAT users can call the CSAT Help Desk with questions regarding the CSAT survey applications and other elements of CSAT. The CSAT Help Desk can be reached at 866-323-2957 (toll free) between 7 a.m. and 7 p.m. (ET), Monday through Friday. The CSAT Help Desk is closed for Federal holidays.

CSAT Help Desk Toll Free Number 866-323-2957; 8:30 am – 5 pm ET.

13. Addendum A – Ownership and Facility Type Instructions

Owner (required): Enter the first and last name of the facility's owner.

Operator (required): Enter the first and last name of the facility's operator. In some cases, this may be the same as the owner information.

Parent Company Name (optional): If applicable, enter the name of the parent company for the facility. Otherwise, leave blank.

Parent Company Data Universal Numbering System (DUNS)[1] Number (optional): If applicable, enter the DUNS number for the parent company. Otherwise, leave blank.

Facility Co-Location Status (required): Use the drop down list to select the option that best describes your facility.

Facility DUNS Number (optional): If applicable, enter the DUNS number for the facility. Otherwise, leave blank.

Facility North American Industry Classification System (NAICS)[2] Code Level 1 (required): Use the drop down list to select the code that best describes your facility.

Facility North American Industry Classification System (NAICS) Code Level 2 (required): The selection for this level is dependent on your NAICS Code Level 1. Use the drop down list to select the code that best describes your facility.

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[1] A DUNS number is a unique 9-digit identifier issued and maintained by Dun & Bradstreet (D&B) that provides a means for identifying businesses on a location-specific basis. For more information see www.dnb.com.

[2] The NAICS classifies business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. economy. The NAICS industry codes define establishments based on the activities in which they are primarily engaged. See the United States Census Bureau NAICS search tool for additional help.

Facility North American Industry Classification System (NAICS) Code Level 3 (optional): The selection for this level is dependent on your NAICS Code Level 2. Use the drop down list to select the code that best describes your facility.

Facility North American Industry Classification System (NAICS) Code Level 4 (optional): The selection for this level is dependent on your NAICS Code Level 3. Use the drop down list to select the code that best describes your facility.

Facility US Environmental Protection Agency (EPA) Identifier[3] (optional): If applicable, enter the identifier number under which the facility is registered with the EPA.

Facility Sector Type (required): Use the drop down list to select the option that best describes your facility. See the DHS Critical Infrastructure Sector webpage for more details.

U.S. Small Business Administration (SBA) (required): Select Yes if the facility qualifies as a small business as defined by the U.S. Small Business Administration. Otherwise, select No

SBA criteria (required if selected yes for SBA qualified). Select from the drop down list the criterion used to qualify the facility as an SBA. See the US SBA website for more details.

[3] Federal regulations require generators of hazardous waste to obtain an EPA Identification (EPA ID) number using EPA Form 8700-12 and to submit the completed form to the authorized state agency or EPA regional office if the state is not authorized to implement the Resource Conservation and Recovery Act Subtitle C program. The Site Identification Form (EPA Form 8700-12) includes information such as:

Facility's name and address, contact information, and a description of hazardous waste activities conducted at the site.

See the US EPA website for more details and registration forms if applicable.

14. Addendum B – Personnel Information Instructions

Number of full-time employees (required): Enter a numerical value to indicate the number of full-time employees that work at your facility. The answer must be a positive integer up to six (6) figures with no periods or commas. Enter zero (0) if you do not have full-time employees.

Number of part-time employees (required): Enter a numerical value to indicate the number of part-time employees that work at your facility. The answer must be a positive integer up to six (6) figures with no periods or commas. Enter zero (0) if you do not have part-time employees.

Number of contractors (required): Enter a numerical value to indicate the number of contractors that work at your facility. The answer must be a positive integer up to six (6) figures with no periods or commas. Enter zero (0) if the facility does not employ any contractors.

Number of other type of employees (required): Enter a numerical value for the number of other employees that work at your facility that do not fall into any of the previous categories. The answer must be a positive integer up to six (6) figures with no periods or commas. Enter zero (0) if the facility does not employ any other types of employees.

Facility Security Officer (required): Enter first and last name, a nine (9) digit phone number, and a valid email address. If you do not have a designated facility security officer enter the person who is responsible for responding to security incidents.

Assistant Facility Security Officer (optional): Select **Yes** if the facility has a designated person as an assistant facility security officer. Otherwise, select **No**. If you answer yes, you must provide his or her contact information.

Cyber Security Officer (optional): Select **Yes** if the facility has a designated person responsible for overseeing and leading initiatives that concern the overall cybersecurity of your facility. Otherwise, select **No**. If you answer **Yes**, you must provide his or her contact information.

Corporate Security Officer (optional): Select **Yes** if the facility has a designated personnel responsible for overseeing and leading initiatives that concern the overall security of your corporation. Otherwise, select **No**. If you answer **Yes**, you must provide his or her contact information.

15. Acronym List

ASP Alternative Security Program

CFATS Chemical Facility Anti-Terrorism Standards

CFR Code of Federal Regulations

COI Chemical(s) of Interest

CSAT Chemical Security Assessment Tool

CVI Chemical-terrorism Vulnerability Information

DHS U.S. Department of Homeland Security

EAP Expedited Approval Program

IFR Interim Final Rule

SSP Site Security Plan

SVA Security Vulnerability Assessment