WESTCOAST CHILDREN'S CLINIC

cse-it

CSE-IT Online User Guide

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1. Types of Users

1.1. Roles and access- Agency Admins, Program Admins and Users

You will need to assign all invited users/staff to be a user or one of two types of admins. Please see the descriptions below to determine their assignments.

User

Agency users are staff completing screenings. Users can add client profiles, edit client profiles, conduct screenings, and see a client's screening history. If the Program feature is enabled, they can only see clients in their assigned program.

Admin

Agency admins manage the entire account. Agency admins invite and archive users, have access to the full client list, create and edit programs (if the Program feature is enabled), and have access to account data. Agency admins can also perform the same functions as a user (add clients, conduct screenings, and see a client's past screenings).

Program admins are available if your account has the Program feature enabled. A larger agency with multiple departments or a shared account with different agencies/organizations should consider this role. The Program Admin can be assigned to a staff who can provide administrative support, but is required to have a restricted view of clients in the account. This could be a supervisor or director within an agency, or staff from different organizations/agencies (defined as a program) so their view is limited only to their organization/agency.

Program Admins can do the same functions as an Agency Admin, but are restricted to only the program(s) they are enrolled in. They can invite and archive users, have access to their program(s) client list, can view the account programs (cannot edit or add), and have access to client data for those enrolled in their program(s) only. Program admins can also perform the same functions as a user (add clients, conduct screenings, and see a client's past screenings).

2. Agency and Program Admins

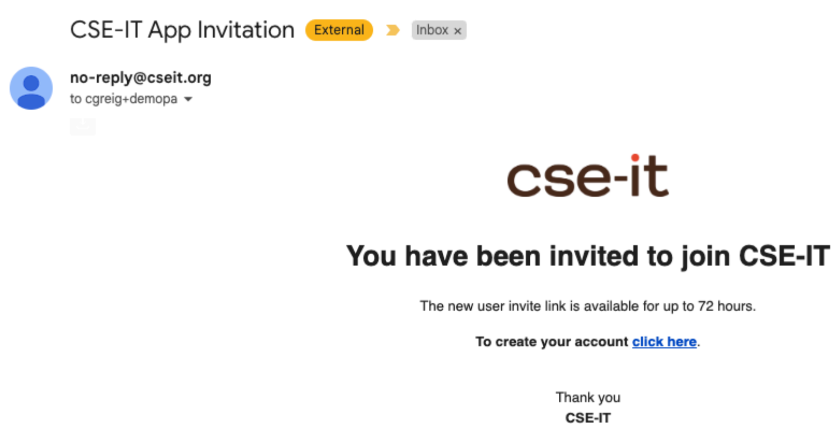
Agency admins manage the entire account. Admins invite and archive users, have access to all client info, create and edit programs (if the [Program feature] is enabled), and have access to account data. Agency admins can also perform the same functions as a user (add clients, conduct screenings, and see a client's past screenings).

Program admins are only visible if the [Program feature] is enabled. They manage the program(s) they are assigned to in the CSE-IT Online account. Program admins can invite and archive users in their same program, have access to their program's client's info, and have access to their program's data. They can add and remove clients from their program only. Program admins can also perform the same functions as a user (add clients, conduct screenings, and see a client's past screenings).

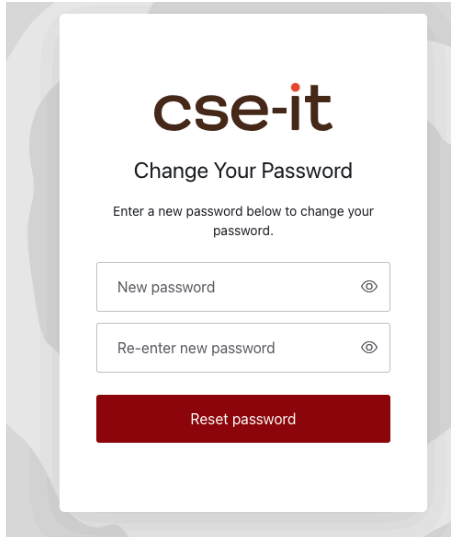
2.1. Set Up Your Account

2.1.1. Create a password

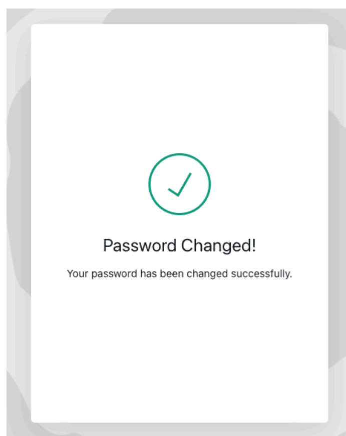
WestCoast will create your agency's account. WestCoast or an admin will send an **email invite via cseit.org** to create your admin login. Click on the link in the email to create your password. **You have 72 hours to create a login before the link expires.** If you use the link after it expires, the website will have an error message.



You will be redirected to the following page:



Set your password by filling in the **Password** field. After re-entering, press submit. Once you successfully set up your password, you will be redirected to the page shown below.

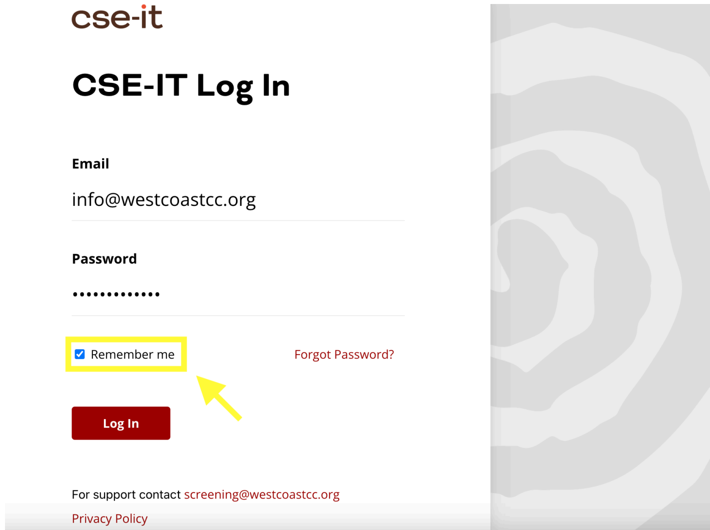


Open a new tab on your browser and type in cseit.org. You can bookmark this page for ongoing use.

2.1.2. Log in

To access CSE-IT Online, use the following url: **cseit.org**. To log in, enter your login credentials and press **Log In** (make sure you created your password from the invite email following the steps in 2.1.1. Create a password). Check the **Remember me** box to save your email and password credentials.

Note: If you receive an error message, clear your browsing history and refresh your browser.



2.1.3. Enroll in Multi-Factor Authentication

CSE-IT Online requires use of an **authenticator app** for Multi-Factor Authentication (MFA). Your organization may require a specific app. **Talk to your IT team to determine your authenticator app** and confirm if you need administrator access to download an authenticator app to your phone or computer.

If your organization **already uses an authenticator app,** you can add another token specifically for CSE-IT Online to that app. Skip to **Step 2:** Register for MFA through CSE-IT Online.

Step 1. Download an app for your phone or computer.

Choose a preferred authenticator app based on your device (type of phone, type of operating system on your computer) or **based on the recommendation from your organization/agency.**

- **Phone:** You can search the **App Store or Google Play Store** (search: Authenticator).
- **Computer:** You can search for a specific authenticator app in your browser and download from their site.

Below is a **list of authenticator apps** with details to help guide your decision.

Note: This is not an exhaustive list. Any authenticator app will work if it supports OATH, TOTP, or HOTP algorithms.

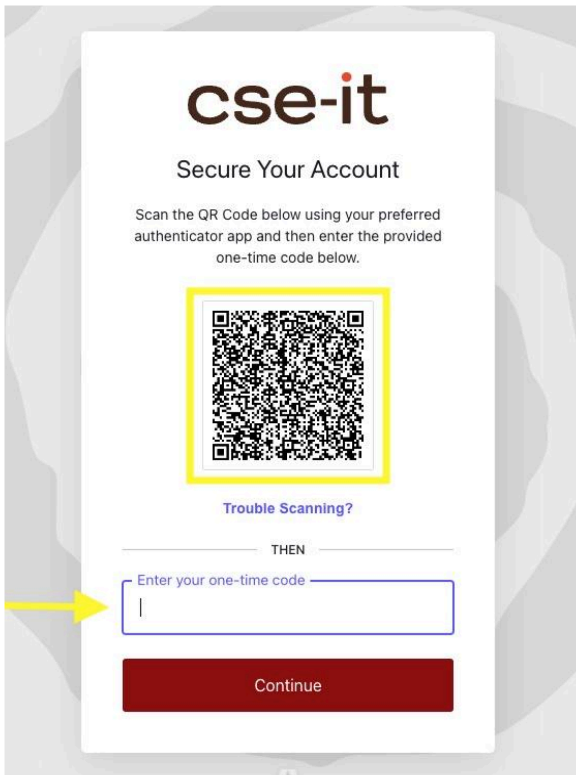
App	Computer or phone	Compatible with (Windows, MacOS, iPhone, Android, Google):	Notes
Authenticator Chrome extension	Computer	Windows/Mac	Only works on Chrome browser How to install and set up the chrome extension
Auth0 Guardian	Phone	Android and Iphone	How to install and set up the app
Duo	Phone	Android and Iphone	How to install and set up the app
Google Authenticator	Both	Android and Iphone	How to install and set up the app
Microsoft Authenticator	Phone	All	How to install and set up the app
Sophos Intercept X	Phone	Android and Iphone	How to install and set up the app
Step Two	Both	MacOS Iphone	Can use across multiple devices Download the app for your computer or phone
Twiolio Authy	Both	All	Can use across multiple devices Authy info and download access
WinAuth	Computer	Windows	How to install and set up the app

Step 2. Register for MFA through CSE-IT Online.
New user/admin:

- Set up your credentials (email and password) for CSE-IT Online using the invitation email link (2.1.1. Create a password). After logging in, you will be prompted to enroll in MFA.

Current user/admin and your MFA was reset:

- If you already have an account but have not set up MFA or need to re-enroll in MFA, enter your email and password to login to CSE-IT Online. You will then be prompted to enroll in MFA.

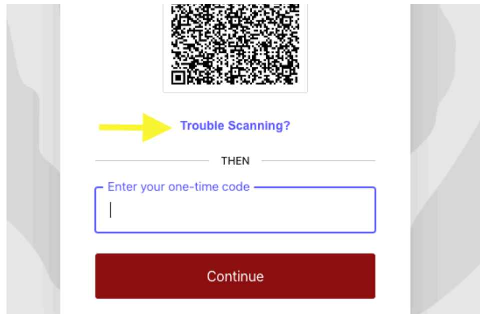


Scan the QR code with your authenticator app.

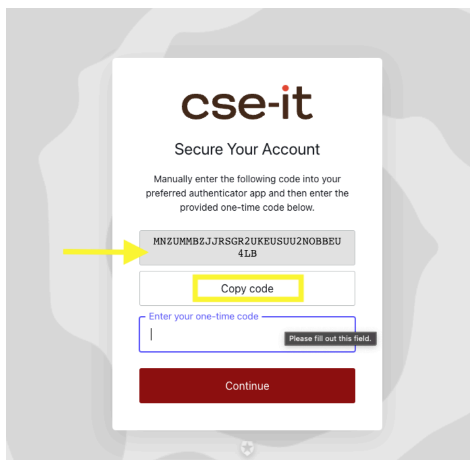
- **Your authenticator app** will provide a **one-time code**. Enter the code into the CSE-IT **Secure Your Account** page in the **Enter your one-time code** box.
- Click the red **Continue** button.

Note: The one-time code is time sensitive. If you delay, the code on the app will change and you will need to type in the new code.

If you cannot scan the code, click '**Trouble Scanning?**'.



You will be provided with a code to manually enter into your authenticator app. Type the provided code into the authenticator app on your phone OR click the white **Copy code** button to copy and paste the code into the authenticator app on your computer.



Your authenticator app will provide a **one-time code**. Enter the code into the CSE-IT **Secure Your Account** page in the **Enter your one-time code** box. Click the red **Continue** button.

Note: The one-time code is time sensitive. If you delay, the code on the app will change and you will need to type in the new code.

Step 3. Save your **recovery code**.

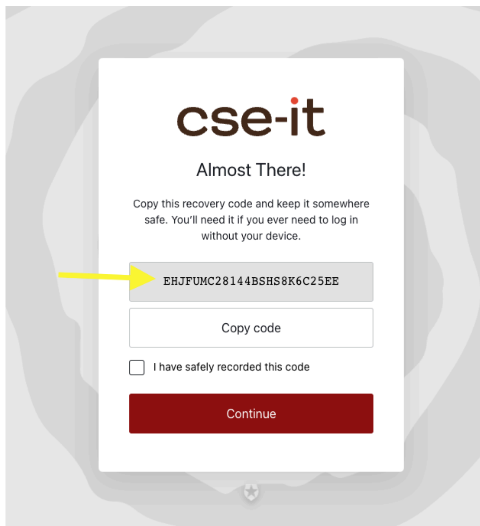
What is a recovery code? The **recovery code** is for one use only when you don't have access to your usual authenticator app.

- You forgot your phone that day
- You no longer have access to your app and need to get into the account (new phone or new computer)

After enrolling the authenticator app with the one-time code, CSE-IT Online will provide a **recovery code**. Store the recovery code somewhere safe for future use as needed, such as a password manager. You can manually write out the recovery code or click the **Copy code** button.

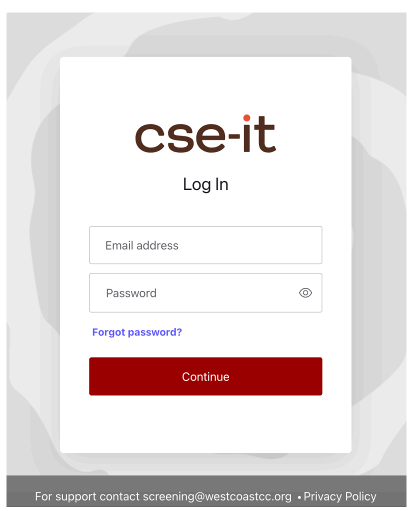
> **Please note:** the recovery code is NOT the one-time code. It is a **backup option** in case you cannot access your authenticator app.

Check the box for **I have safely recorded this code.** Click the red **Continue** button. You will be logged into CSE-IT Online.

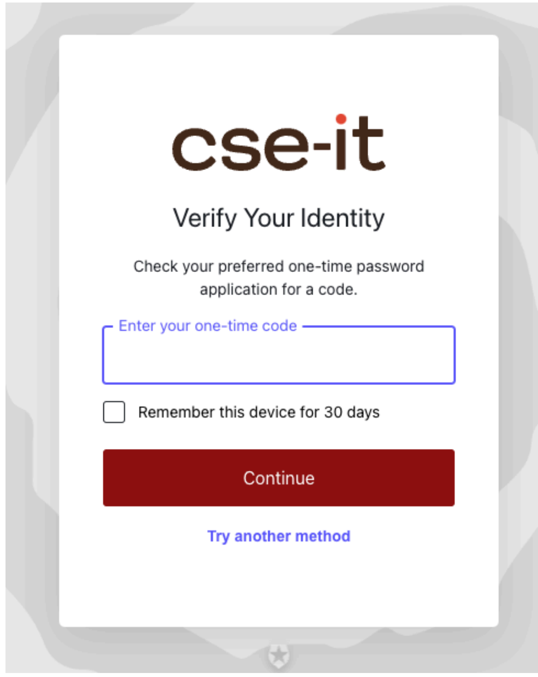


Step 4. Login using MFA.

Enter your email and password on the CSE-IT Online login page.



If your email and password are entered correctly, you will be brought to the MFA page.



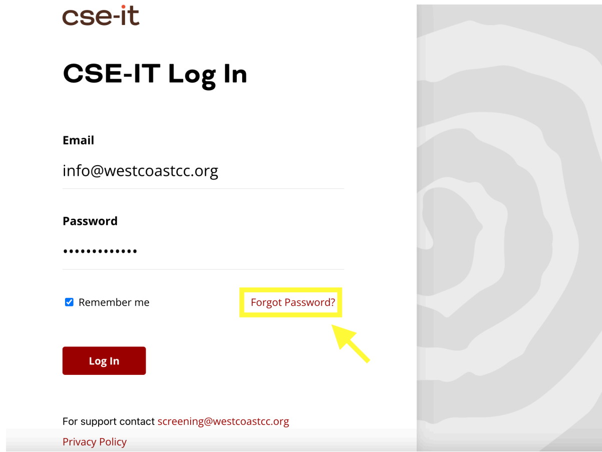
Use your chosen **authenticator app** (on your phone or desktop) to enter the **one-time code it provides** for CSE-IT Online.

Note: The one-time code is time sensitive. If you delay, the code on the app will change and you will need to type in the new one.

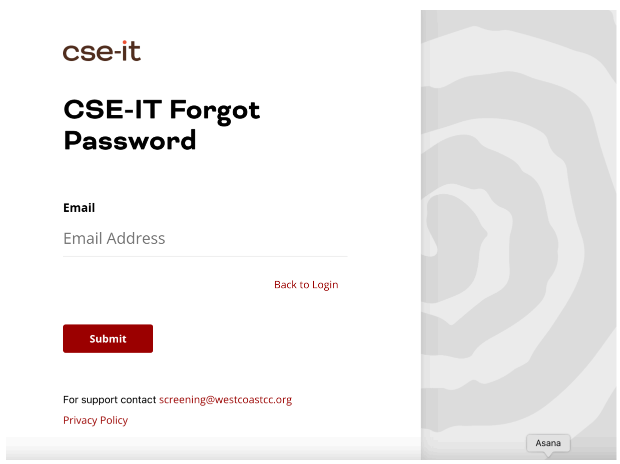
Check the box for **Remember this device for 30 days** to delay needing to use MFA on the same device for 30 days. Click the red **Continue** button.

2.1.4. Forgot password?

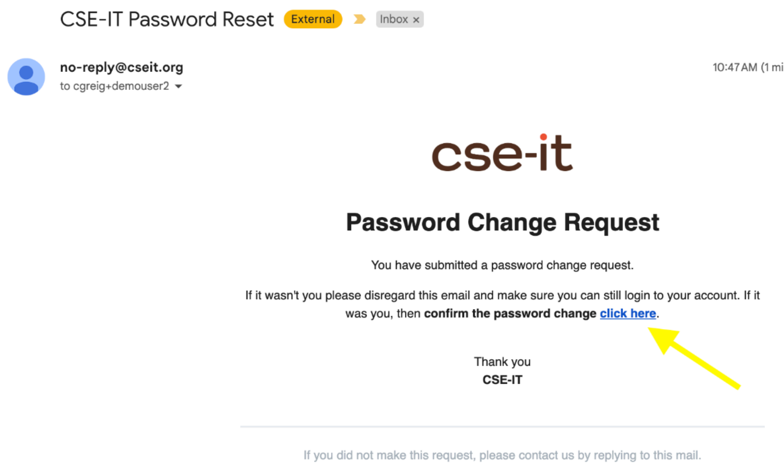
If you forgot your password, click **Forgot Password?**



This will redirect you to a new page where you can enter your login email. **Type your email correctly or you will not receive the reset email and link.**



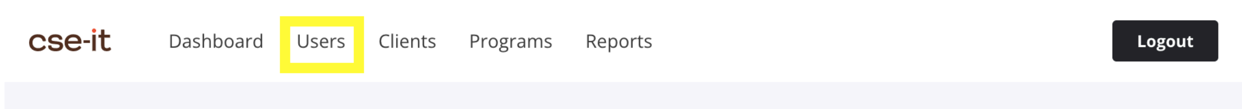
A link to reset your password will be sent to your email. Click the link; the process to reset your password is identical to the process to setting your initial password (see section 2.1.1. [Create a password](#)).



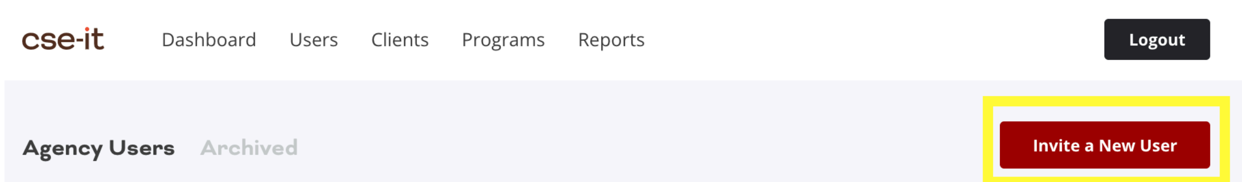
2.2. Manage Users in the Account

2.2.1. Add a new user

Upon logging into CSE-IT Online, you will see the **Dashboard** page. In order to add a new user, click on the **Users** tab at the top of the page.



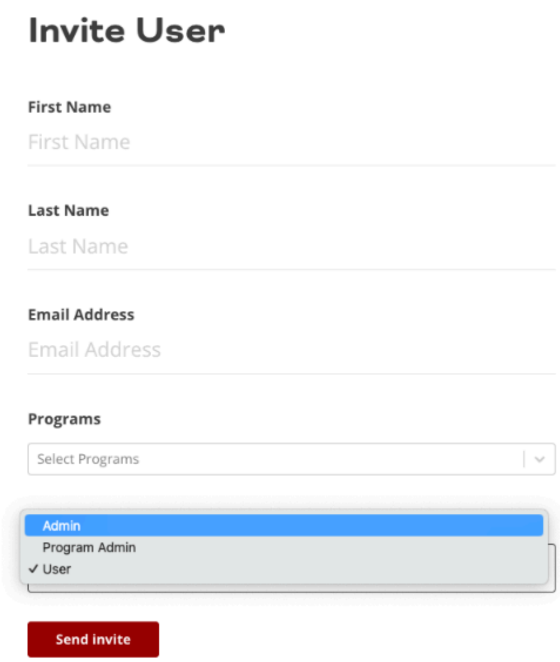
Next, click on the red button that says **Invite a New User**.



Determine if the user will be an **agency admin, program admin, or user.** Agency admins have full access to the account. Program admins have limited access to the account based on the program(s) they are enrolled in. A **user** creates clients and performs screenings (see section [1.1 Roles and Access](#)).

Note: The **user's** email cannot be edited once the invite is sent. Please confirm the email before sending the invite (see section 5.2. User's email was entered incorrectly or section 5.6. Our emails have changed).

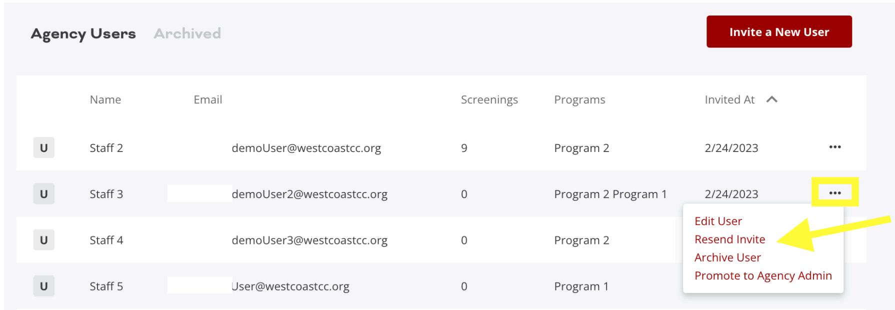
Fill out the required fields in the Invite User form and click the red **Send Invite** button. The user will receive an invite in their email with a link to set their password. **They have 72 hours to create an account before the link expires.**



2.2.2. Resend the invite

Some staff may miss the 72 hour window to set up their account. An **admin will need to resend the invite-** an agency admin or a program admin if they are in the same program as that user.

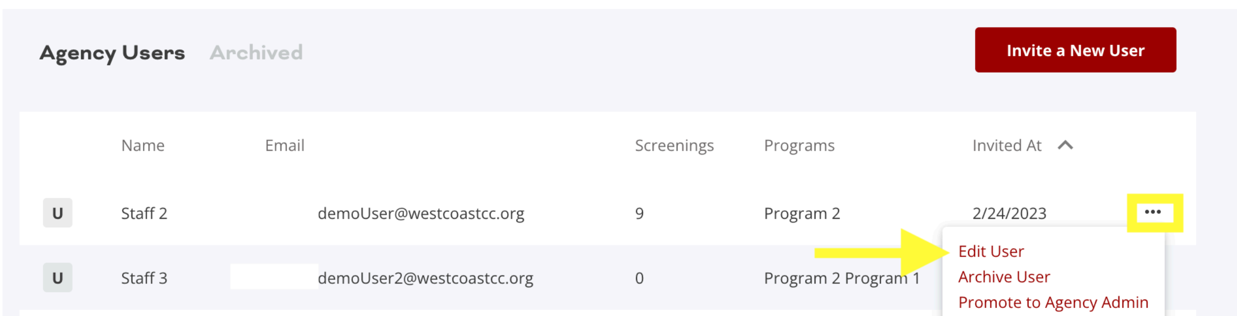
To resend a new user invite email, click the **Users** tab to see the Agency Users list. Find the user, select the **three horizontal dots**, and click **Resend Invite**. The user will receive another invite email with an active link. **They have 72 hours to create an account before the link expires.**

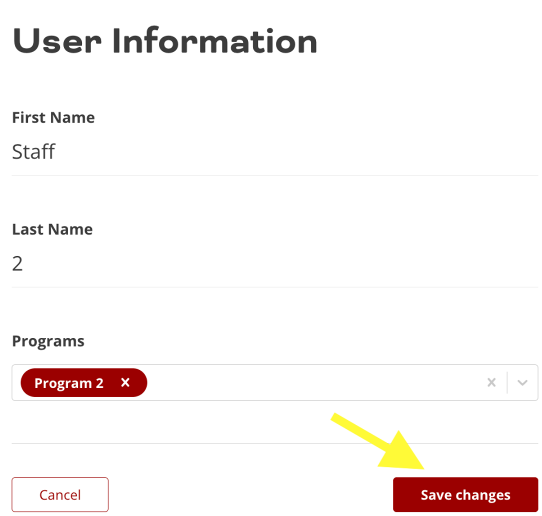


If you do not see the option to **Resend Invite,** that user already set up their password and most likely forgot. Ask them to use the forgot password button.

2.2.3. Edit an existing user

To make changes to a user's information, click the **Users** tab to see the list of users. Select the **three horizontal dots**, and click **Edit User**.





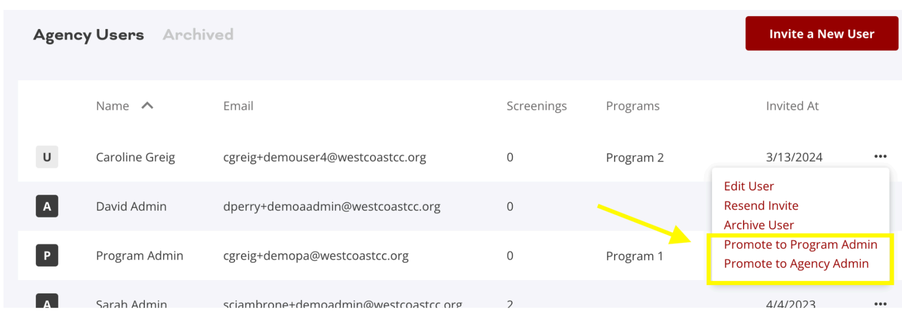
You can make changes to the user's first and last name and/or adjust their program enrollment if this feature is enabled (See section 2.4.1. Create, edit, and archive programs).

Note: You cannot edit a user/admin email address once the invitation is sent. You will need to **archive the user** and **create a new profile** (see section 2.2.5. Archive and unarchive a user). If the email changes over time, please reach out to discuss options (see 5.6. Our emails have changed).

Press **Save Changes** to implement the changes or **Cancel** to disregard the changes.

2.2.4. Promote users and demote admins

To promote a regular user to an agency or program admin, click the **three horizontal dots** and select **Promote to Agency Admin or Promote to Program Admin**.

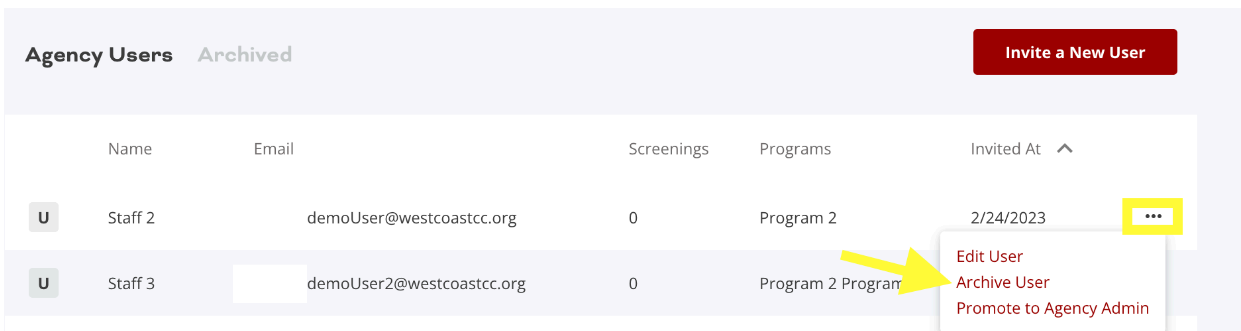


Similarly, to demote from agency admin to regular user or program admin, select the **three horizontal dots** and select **Demote to Agency User or Demote to Program Admin**.

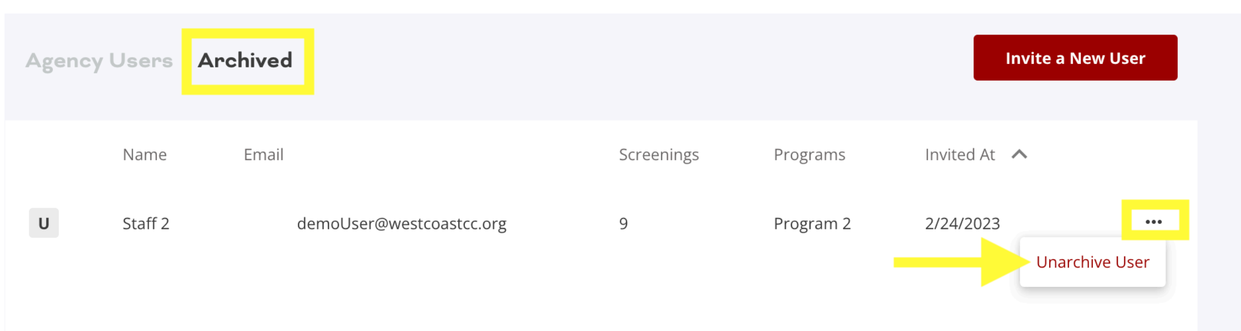
2.2.5. Archive and unarchive a user

An archived user no longer has access to CSE-IT Online, but their screening data will remain available. **When a staff leaves your organization or no longer requires access to CSE-IT Online, archive their user account.**

Start on the **Users** tab. Find the user you need to archive. Select the **three horizontal dots** and select **Archive User**. A pop up window will ask you to confirm that you wish to archive the user. The archived user will now appear under the **Archived** tab.



Similarly, you can **Unarchive a User.** Click the **Archived** tab next to Agency Users. Find the user, click the **three horizontal dots,** and select **Unarchive User**. The unarchived user will now appear under the **Agency Users** list and their account will be reactivated.

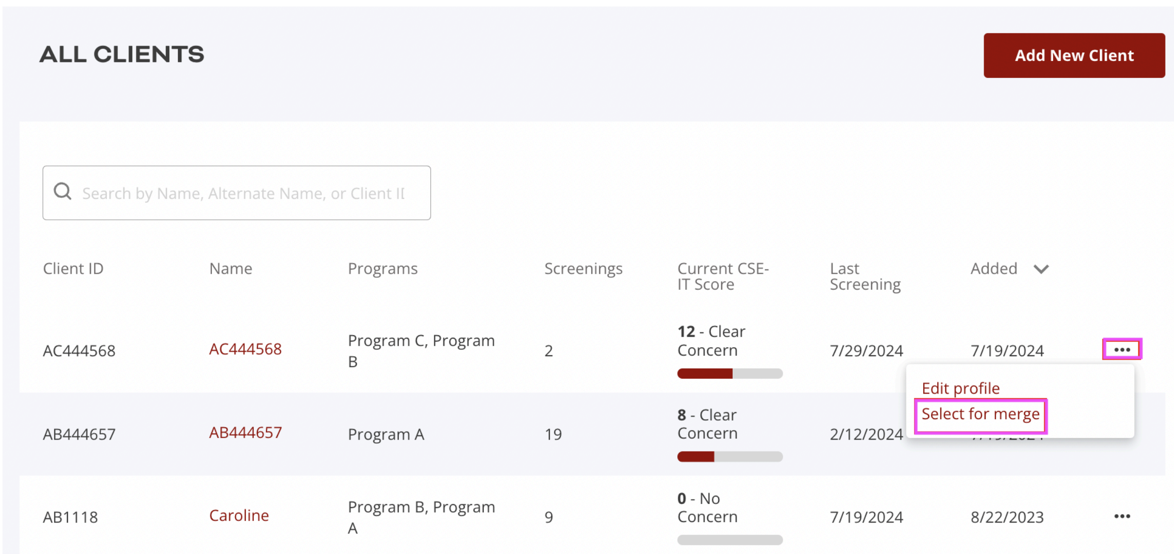


2.3 Merging Duplicate Client Profiles

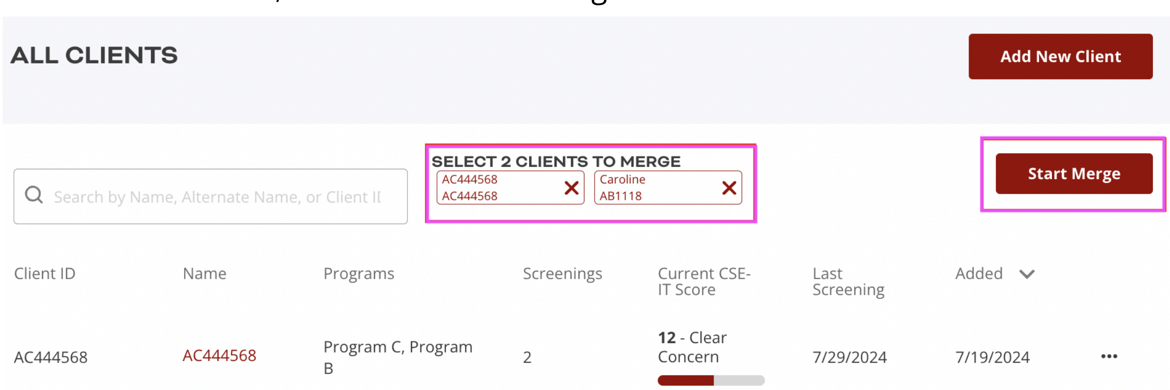
The merge duplicate client profiles feature allows agency and program admins to merge client profiles together, two at a time. Once selected, client data from one profile will be kept while the other will be discarded and no longer visible on the client list. However, **all screenings and programs from both client profiles will be incorporated into the new client profile.** This feature can help agency and program admins to better manage their client lists and reduce client duplication, while maintaining a record of all screenings conducted for a particular client. **Please note: merging clients cannot be reversed.**

How to Merge Duplicate Clients:

In the Clients tab, click the three dots on the clients you would like to merge. Then click "Select for merge".

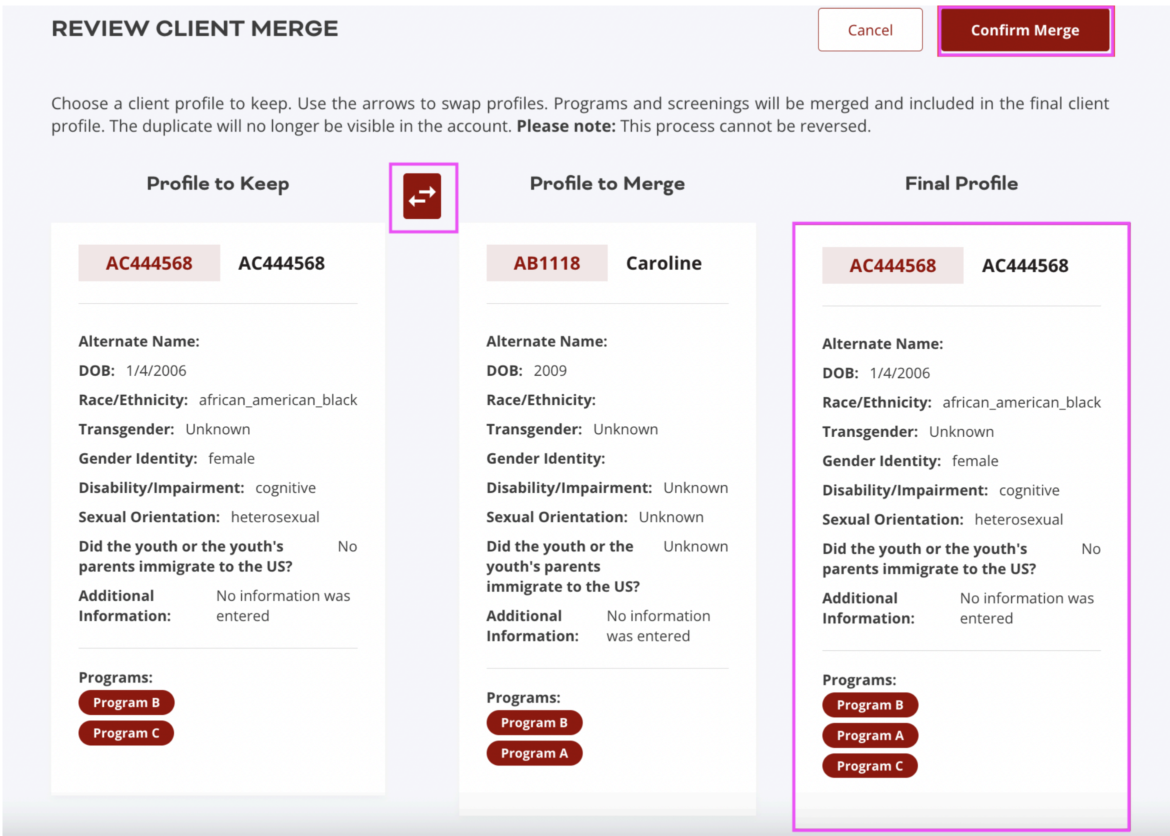


Once two client profiles are selected for merging, they will show up to the right of the search bar. Next, click on the "Start Merge" button.

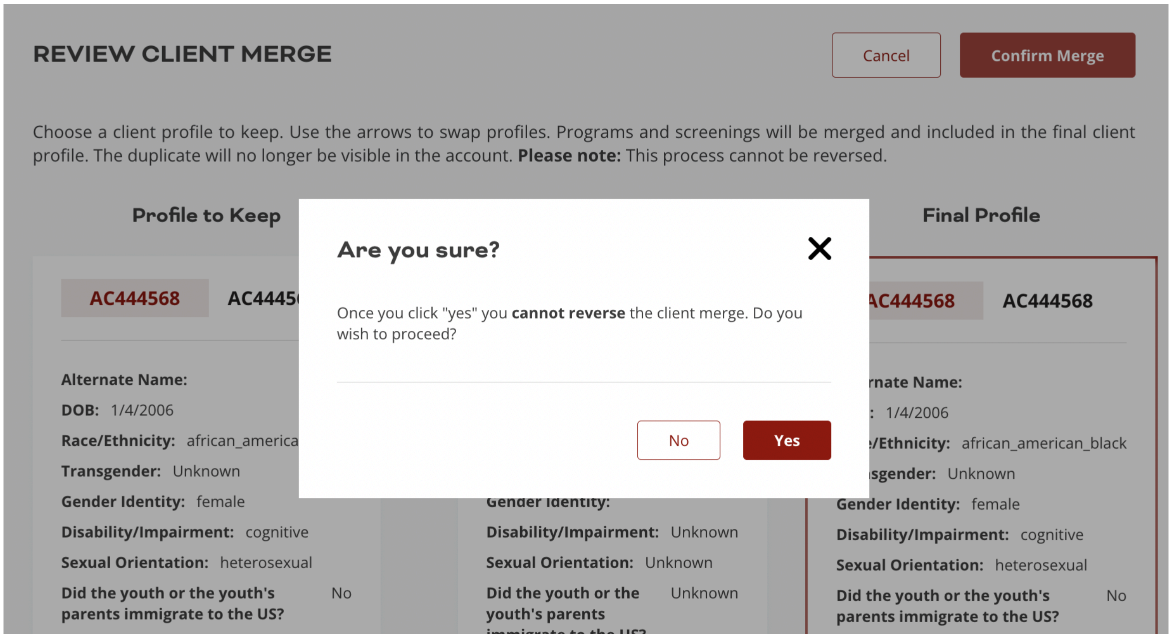


You will then be taken to the "Review Client Merge" page. Choose which client profile you would like to keep (“Profile to Keep,” on the left) and which is the duplicate (“Profile to Merge,” in the middle). All screenings and programs from both client profiles will be incorporated into the final client profile. You can switch these profiles by clicking on the double arrow button.

The "Final Profile" on the right will be the new profile that will be kept in the system. Once you are ready to merge the two profiles, click on the "Confirm Merge" button.



Confirm you want to merge the two profiles. **Please note: this process cannot be reversed!** Carefully review your decision before merging.



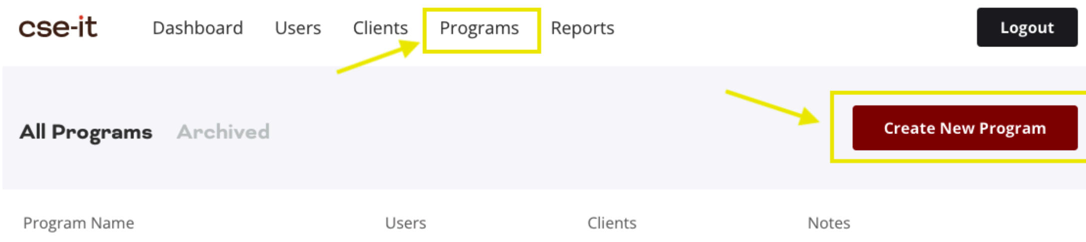
2.4 Using the Programs Feature

The Programs feature is an optional feature that allows admins to segment clients and users. Clients/users are enrolled in your created programs. The programs make smaller client lists, allowing only users in the same program as the client to view their information, instead of viewing all clients in the entire agency account. **Contact** screening@westcoastcc.org **to enable your account's Programs feature.**

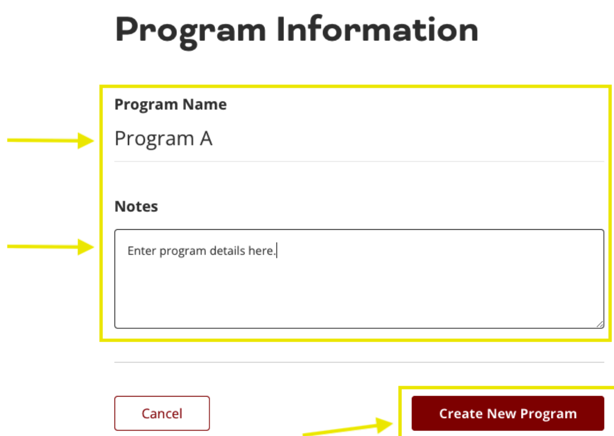
Program admins are only available if the Program feature is enabled. They manage the program(s) they are assigned to in the CSE-IT Online account. Program admins can invite and archive users in their same program, have access to their program's client's info, and have access to their program's data. They can add and remove clients from their program only. Program admins can also perform the same functions as a user (add clients, conduct screenings, and see a client's past screenings).

2.4.1. Create, edit, and archive programs

Click on the Programs link. On the Programs page, click on **Create New Program.**

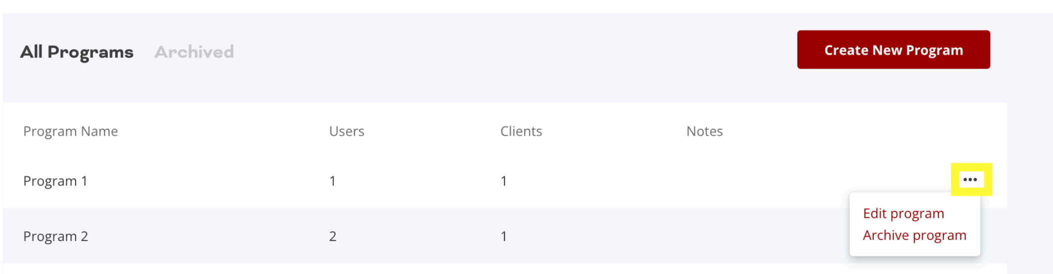


Enter a Program name and any notes you wish to include. Click **Create Program**.

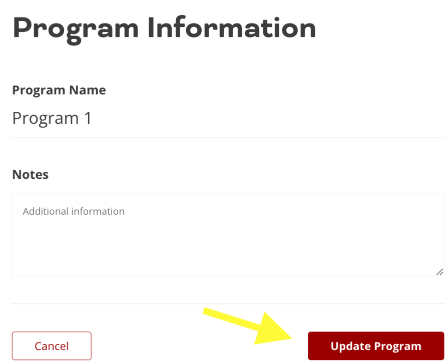


Your new program will display in the **All Programs** list. You can see the number of users and clients in each program.

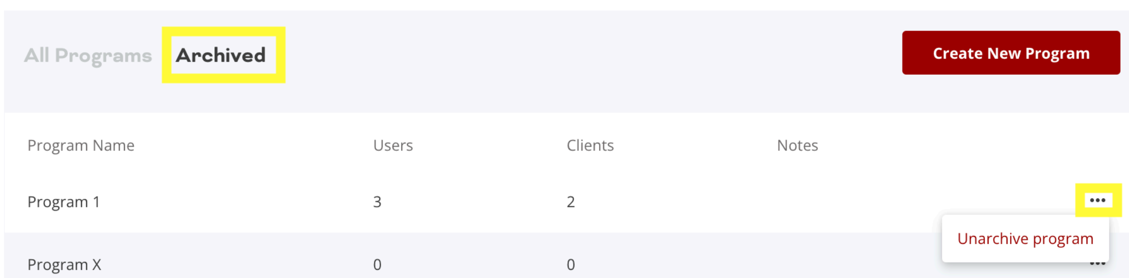
You can **edit** and **archive** programs using the **three horizontal dots** to the right of the program name.



To edit, find the program, click the **three horizontal dots**, and click **Edit program.** You can edit the name or notes for a program. Click **Save Changes** at the bottom of the page.



To archive, click **Archive program**. This will remove the program from view, but screenings will remain available and identifiable in the data report. Clients and users will need to be assigned to a different program once it is archived. You can view previously archived programs by clicking **Archived** next to **All Programs.** If needed, you can also unarchive a program and return it to your programs list.



2.4.2 Add users to a program(s)

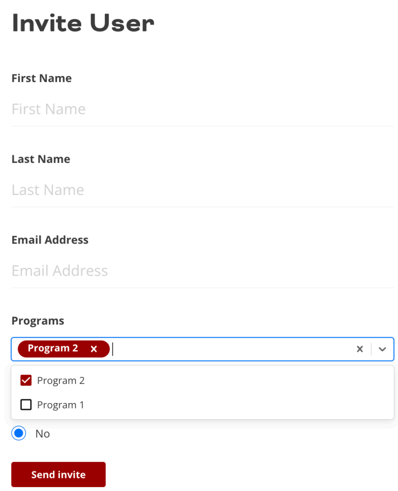
After you create programs, you can assign users and program admins to one or more programs at a time. They will only be able to view clients that are in the same program. **Please note**, agency admins are not assigned to programs as they have access to the entire client list.

Note: Users that are not assigned to a program will only see clients that are also not assigned to a program. Only program and agency admins can assign a user to a program.

There are two ways to assign users and program admins to a program:

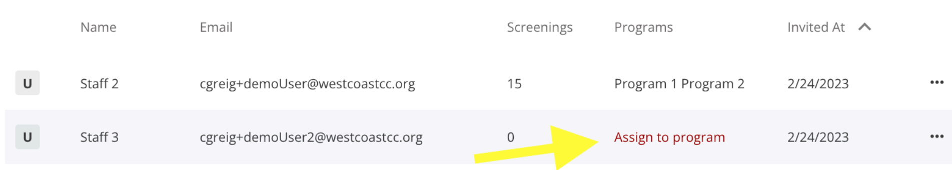
Invite a new user

The Invite User form includes a Programs dropdown list. Select the appropriate program, then click **Send Invite**.

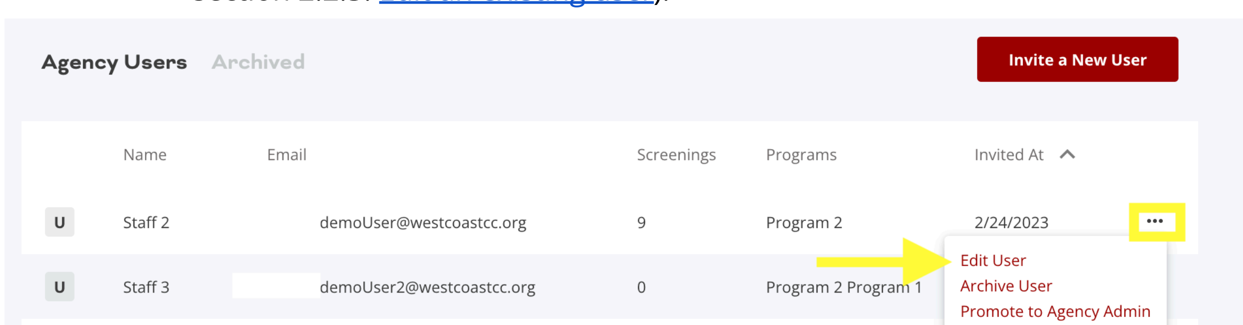


Assign an existing User to a program

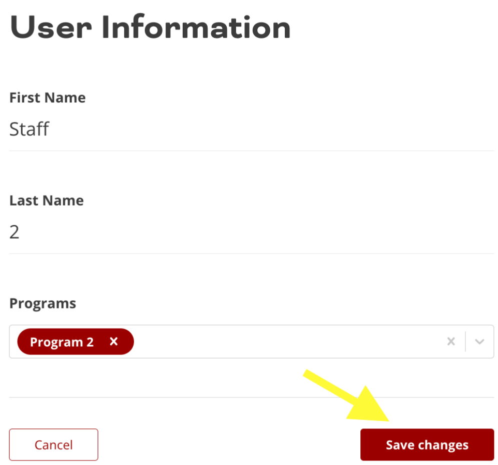
Go to the **Users** page. Look for **Assign to program** in the Programs column to identify the staff that are not assigned. Click **Assign to Program** to be brought to the user profile. You can also add or change a program by editing their profile (see section 2.2.3. Edit an existing user).



Go to the **Users** page. Click on the **three horizontal dots** and select Edit User. Click **Assign to Program** to be brought to the user profile. You can also add or change a program by editing their profile (see section 2.2.3. Edit an existing user).

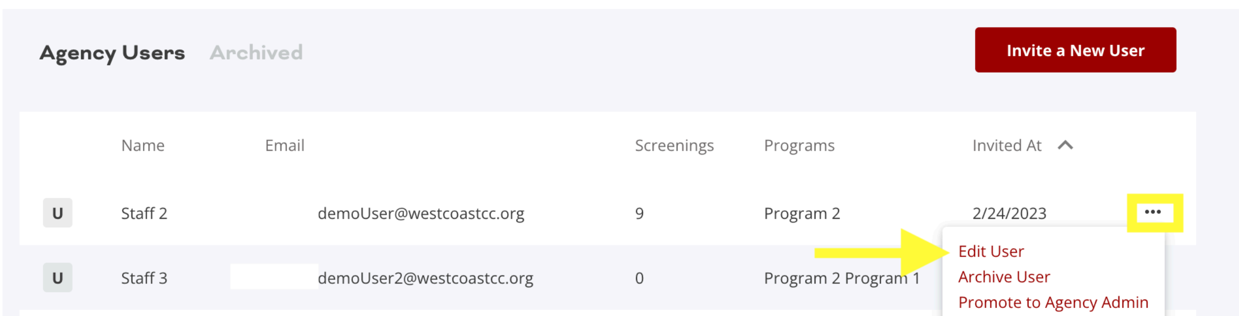


Add one or multiple programs from the **Programs** dropdown list. **Click Save Changes.** The change will be reflected on the Agency User list.



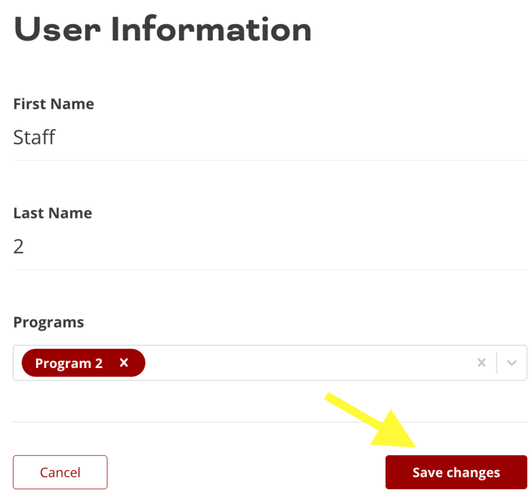
2.4.3. Change a user's program(s)

You can change a user's program(s) on the **Users** tab. Find the user, click the **three horizontal dots**, and select **Edit User**.



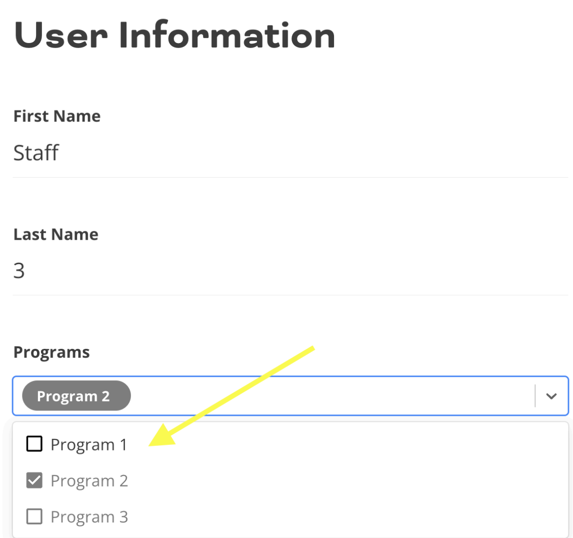
Agency Admins: Add or change the user's assigned programs from the **Programs** dropdown list. **Click Save Changes.** The change will be reflected on the Agency User list.

Note: Agency Admins can add or remove any program for any type of user in the account.



Program Admins: Add or change the user's assigned programs from the **Programs** dropdown list. **Click Save Changes.** The change will be reflected on the User list.

Note: Program admins can only add or remove to/from the programs the program admin is also assigned to.



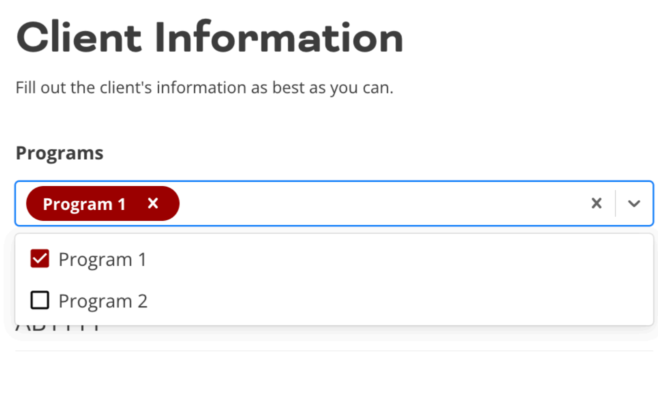
2.4.4. Assign a client to a program(s)

After you create programs, you can assign clients to one or more programs at a time. Users will only be able to view clients that have been assigned to the same program(s).

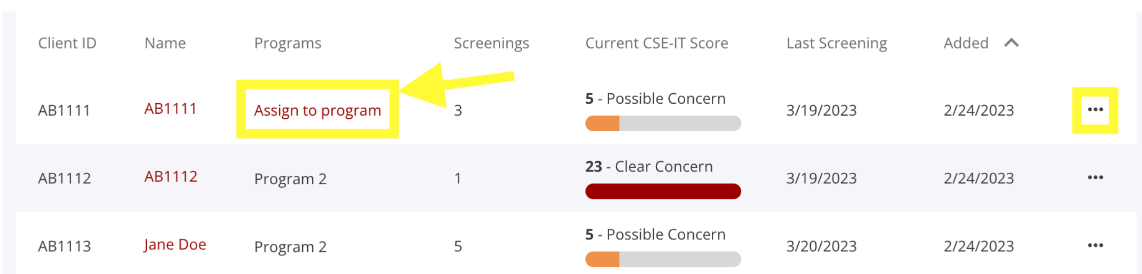
Note: Clients that are not added to a program will be seen by all users.

There are two ways to assign a client to a program:

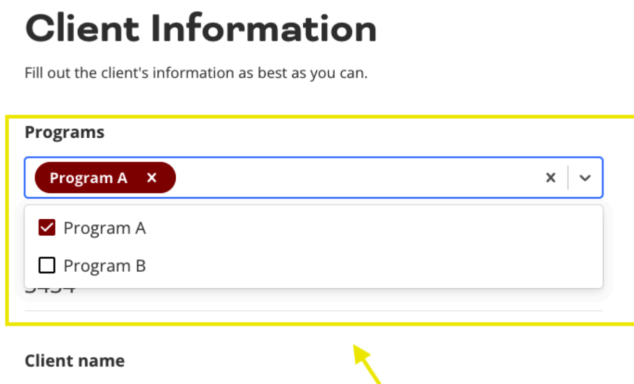
1. **Create a new client**- Go to the **Clients** page. Click **Add New Client** to create a new client profile. It will show a Programs dropdown list. Select the appropriate program(s), then click **Save Changes**.



2. **Assign an existing Client to a program**- Go to the **Clients** page. Look for **Assign to program** in the Programs column to identify the clients that are not assigned. Click **Assign to Program** to be brought to the client profile. You can also add or change a program by editing their profile (see section 3.2.3. Edit a client profile).



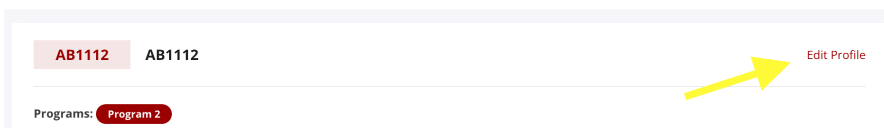
Add or change the program from the **Programs** dropdown list. Click **Save Changes.** The change will be reflected on the Agency User list.



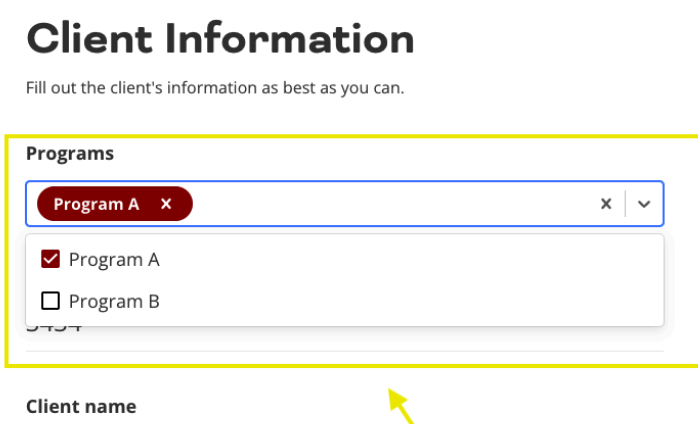
2.4.5 Change or remove a client from a program

Please note, **only agency and program admins can remove clients** from a program. Navigate to the **Clients** page. Select the client you would like to remove from a program(s). Click **Edit Profile**. De-select the program they should be removed from on their profile page. You can also add them to a different program on this same page.

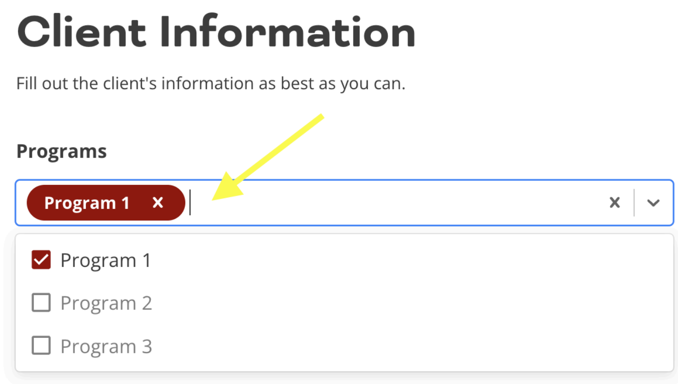
Note: Clients that are not added to a program will be seen by all users.



Agency admins can add or remove any client from any program.



Program admins can only add and remove clients that are in their same program.



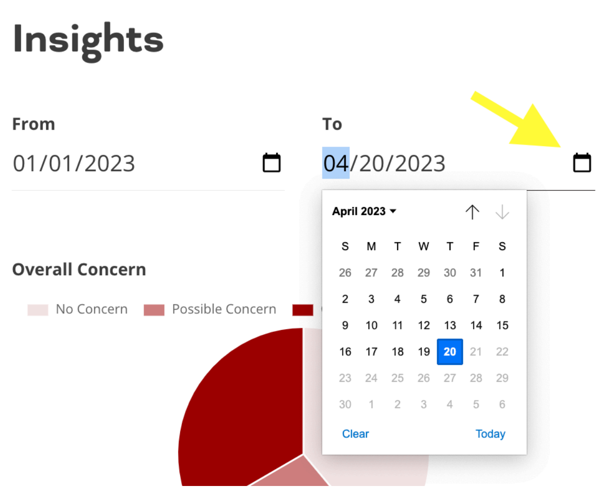
Tip: At this time, client profiles are not able to be deleted or archived in CSE-IT Online. If you wish to remove clients from view for users, create a new program with no assigned users. Assign all desired clients to this program only. These clients will only be visible to agency admins and on the data spreadsheet (their old screenings).

2.5 CSE-IT Screening Data

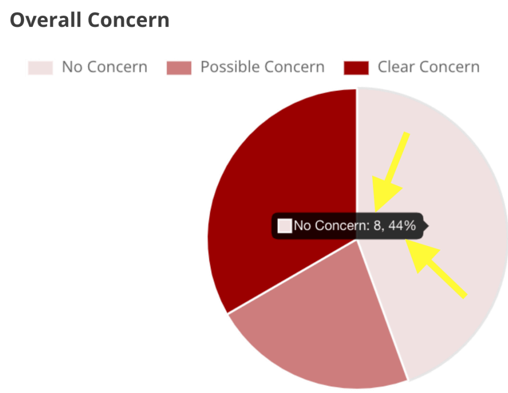
2.5.1. Data dashboard

The data dashboard is the first page admins see when they log in. The **Dashboard** page has **Insights** including visualizations of screening scores in relation to client demographics and program(s) if applicable.

Set the time frame by changing the **From** and **To** dates. The charts and graphs will only include screening data within the selected timeframe.

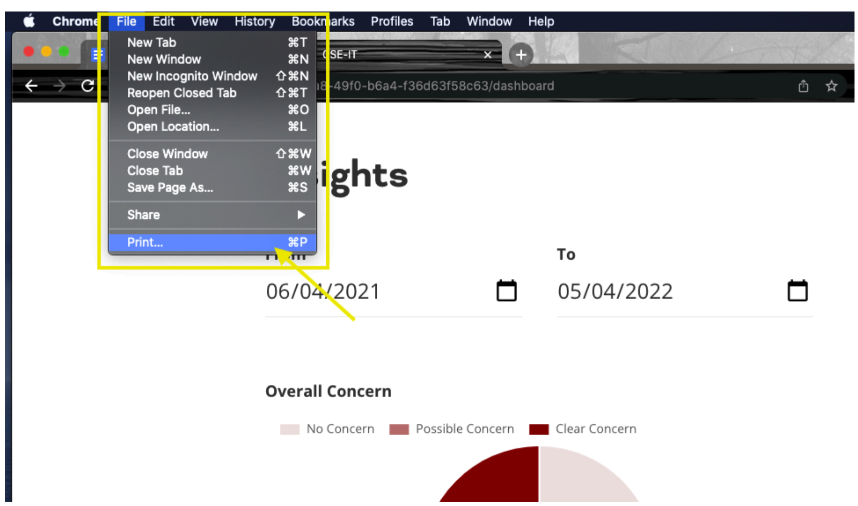


Hover over charts and graphs to see the number of screenings and percentages for each concern level.

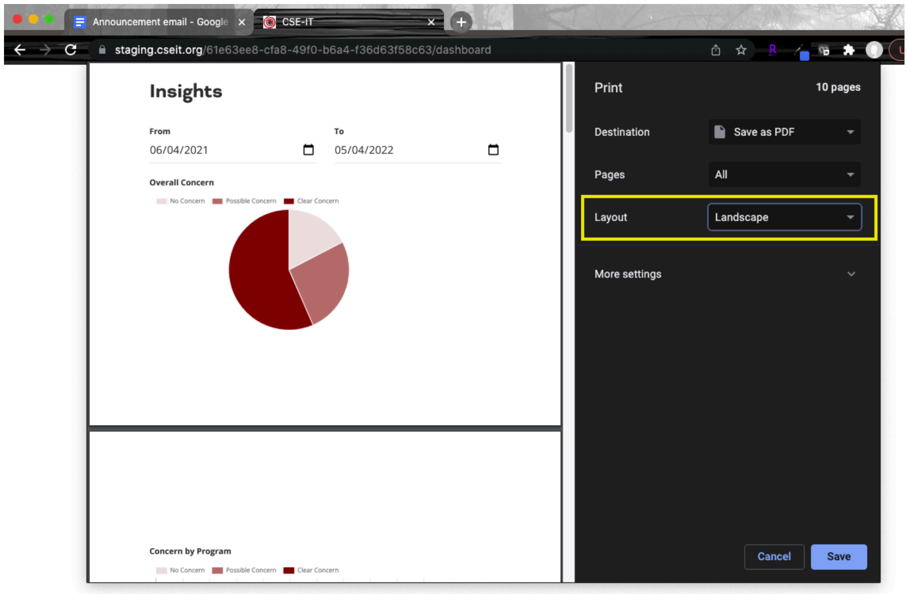


2.5.2 Print or save a PDF of the dashboard

To print or save a PDF copy of the Dashboard, use your browser's Print command. Please note this guide shows printing in Google Chrome. Your browser's menu may look different.



Use your browser's Print dialog box to select your options. We recommend selecting the "Landscape" layout. It will print one chart per page.


Announcement email - Google
CSE-IT
staging.cseit.org/61e63ee8-cfa8-49f0-b6a4-f36d63f58c63/dashboard
Insights
From
06/04/2021
To
05/04/2022
Overall Concern
No Concern
Possible Concern
Clear Concern
Concern by Program
Print
10 pages
Destination
Save as PDF
Pages
All
Layout
Landscape
More settings
Cancel
Save

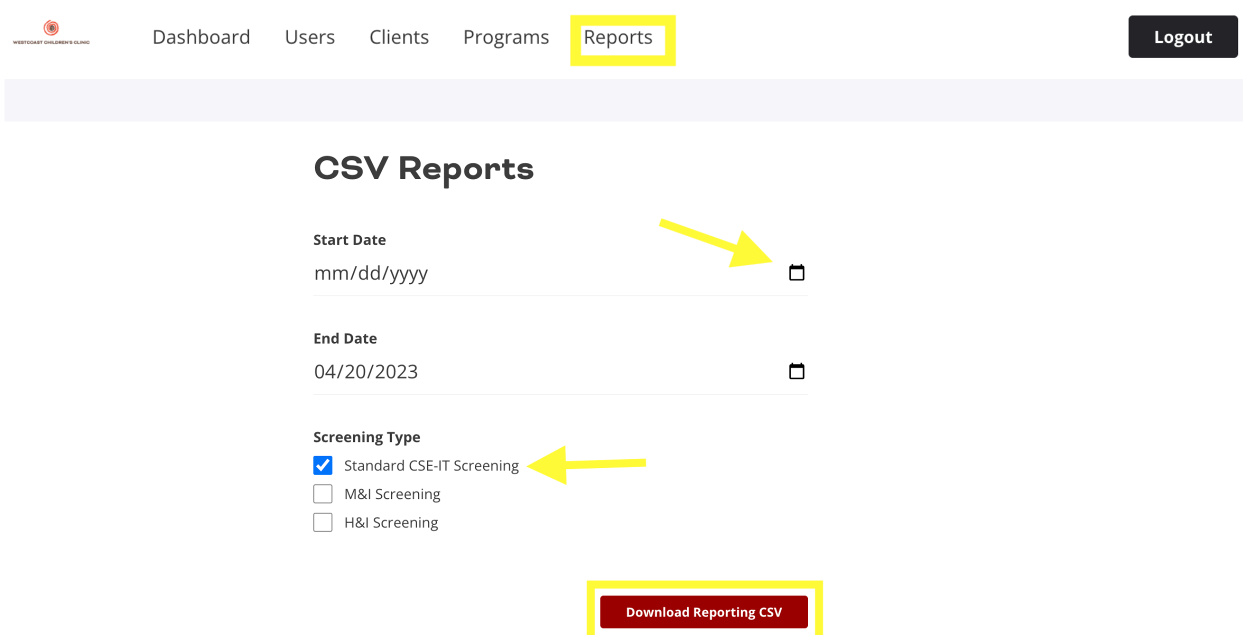
2.5.3 Download a raw data .csv report

Take a look at our CSE-IT Partner Sites folder, CSE-IT Online folder for a key for the raw data report.

Agency admins can access a raw data .csv report of the full client list including demographic information and CSE-IT screening scores.

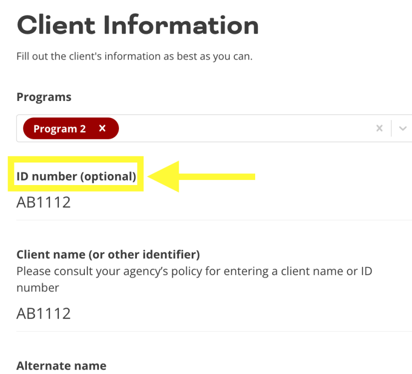
Program admins can access a raw data .csv report of the client list for their program (and clients they share with other programs) including demographic information and CSE-IT screening scores.

Click on **Reports**. Set your desired timeframe and version of the CSE-IT, then click **Download Reporting CSV.**

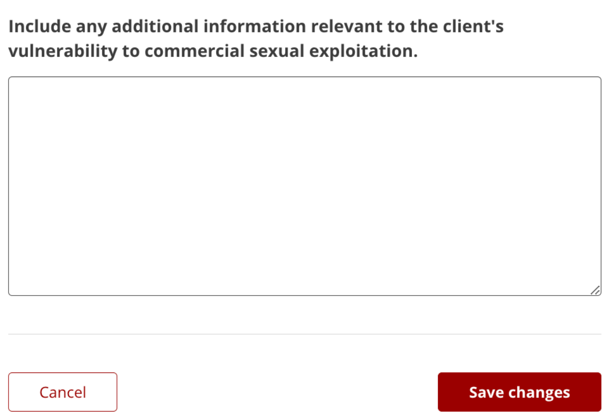


Data in the report includes user info, agency info, a de-identified unique ID, ID number entered in the client profile, client age at the time of screening and current age, program at the time of screening and current program (if applicable), demographic information, and CSE-IT statement and indicator scores.

Note: Clients must have an **ID number** entered in their client profile to be identified by your agency on the .csv report. The report will not include the client name or date of birth. The ID number enables you to use the report as a case list.



Note: Information added to the final text box on the client profile page will be added to the .csv report. Information entered is determined by your agency protocol. **Do not include PII in this text box.**



If you are looking for support with data summary or interpretation with your raw data, reach out to us at screening@westcoastcc.org.

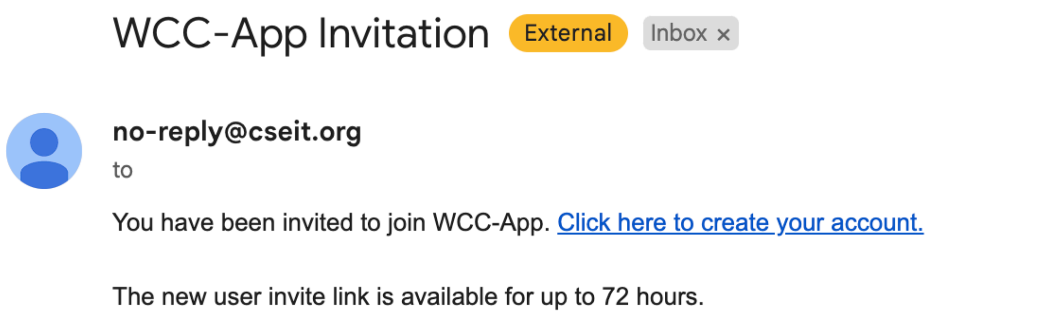
3. All Users

The following are features that *any* user, including admins, can access.

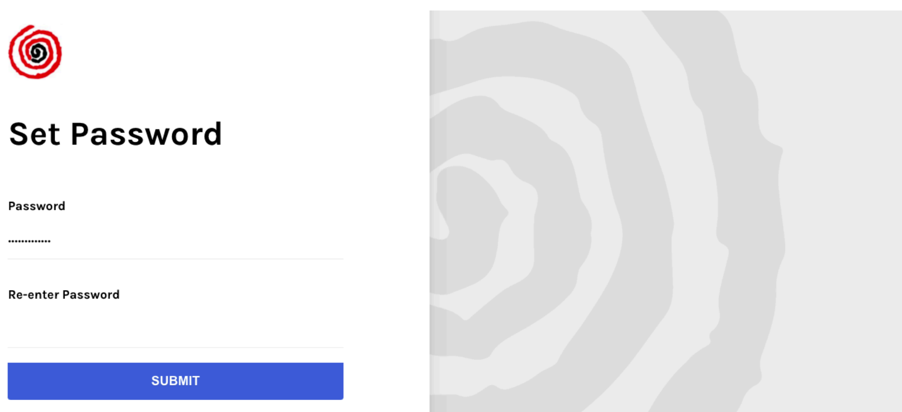
3.1. Set Up Your Account

3.1.1 Create a password

Your agency admins are responsible for adding users to the CSE-IT Online account. They will send an invite email via cseit.org. Click on the link in the email to create your password. **You have 72 hours to create a login before the link expires.**



The link will redirect you to the following page:



Set your password by filling in the **Password** field. After re-entering, press submit. Once you successfully set up your password, you will be redirected to the following page where you can press **Login** to access the platform.

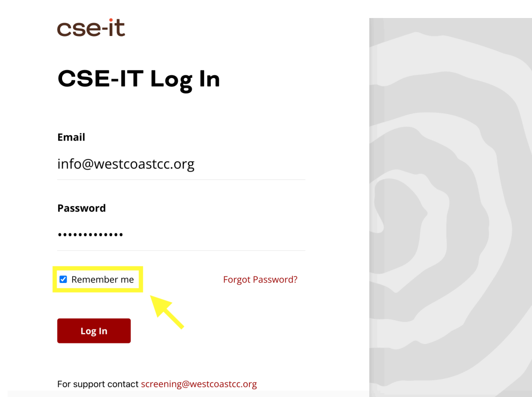
3.1.2. Log In

To access CSE-IT Online, use the following url: cseit.org.

Note: Once you set your password, the original invitation link will expire. If you click or favorite the invitation link, you will receive an error message. For ongoing **access to CSE-IT Online, use cseit.org**

To log in, enter your login credentials (email address and password from step 2.1.1. Create a password) and press **Log In.**

Check the **Remember me** box before logging in to save your email and password credentials.



3.1.3. Enroll in Multi-Factor Authentication

CSE-IT Online requires use of an **authenticator app** for Multi-Factor Authentication (MFA). Your organization may require a specific app. **Talk to your IT team to determine your authenticator app,** and if you need administrator access to download an authenticator app to your phone or computer.

If your organization **already uses an authenticator app,** you can add another token specifically for CSE-IT Online to that app. Skip to **Step 2:** Register for MFA through CSE-IT Online.

Step 1. Download an app for your phone or computer.

Choose a preferred authenticator app based on your device (type of phone, type of operating system on your computer) or based on the recommendation from your organization/agency.

- **Phone:** You can search the **App Store or Google Play Store** on your phone (search: Authenticator).
- **Computer:** You can search for a specific authenticator app in your browser and download from their site.

Below is a **list of authenticator apps** with details to help guide your decision.

Note: This is not an exhaustive list. Any authenticator app will work if it supports OATH, TOTP, or HOTP algorithms.

App	Computer or phone	Compatible with (Windows, MacOS, iPhone, Android, Google):	Notes
Authenticator Chrome extension	Computer	Windows/Mac	Only works on Chrome browser How to install and set up the chrome extension
Auth0 Guardian	Phone	Android and Iphone	How to install and set up the app
Duo	Phone	Android and Iphone	How to install and set up the app
Google	Both	Android and Iphone	How to install and set up the

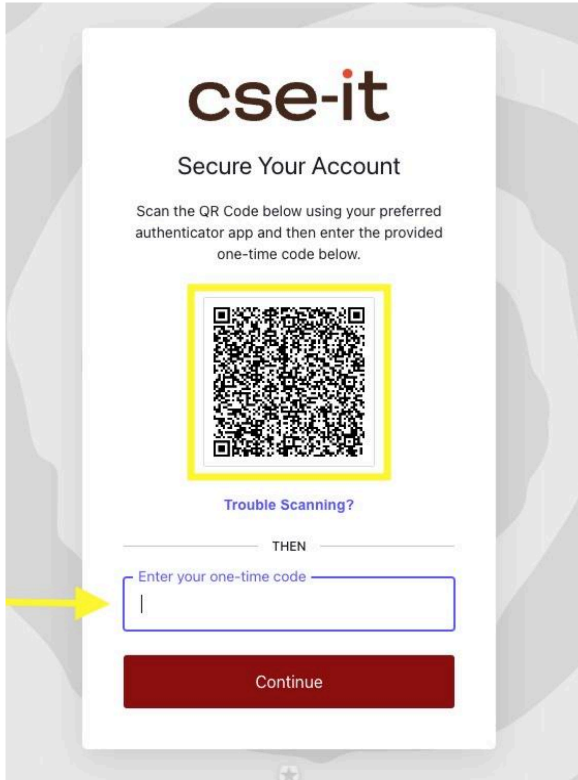
Authenticator			app
Microsoft Authenticator	Phone	All	How to install and set up the app
Sophos Intercept X	Phone	Android and Iphone	How to install and set up the app
Step Two	Both	MacOS Iphone	Can use across multiple devices Download the app for your computer or phone
Twiolio Authy	Both	All	Can use across multiple devices Authy info and download access
WinAuth	Computer	Windows	How to install and set up the app

Step 2. Register for MFA through CSE-IT Online.
New user/admin:

- Set up your credentials (email and password) for CSE-IT Online using the invitation email link. After logging in, you will be prompted to enroll in MFA.

Current user/admin and your MFA was reset:

- If you already have an account, enter your email and password to login to CSE-IT Online. You will then be prompted to enroll in MFA.



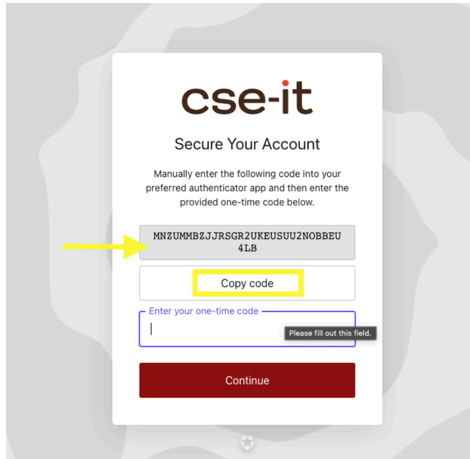
Scan the QR code with your authenticator app.

- **Your authenticator app** will provide a **one-time code**. Enter the code into the CSE-IT **Secure Your Account** page in the **Enter your one-time code** box.
- Click the red **Continue** button.

Note: The one-time code is time sensitive. If you delay, the code on the app will change and you will need to type in the new code.

If you cannot scan the code, click '**Trouble Scanning?**'.

You will be provided with a code to manually enter into your authenticator app. Manually type the provided code into the authenticator app on your phone OR click the white **Copy code** button to copy and paste the code into the authenticator app on your computer.



Your authenticator app will provide a **one-time code**. Enter the code into the CSE-IT **Secure Your Account** page in the **Enter your one-time code** box. Click the red **Continue** button.

Note: The one-time code is time sensitive. If you delay, the code on the app will change and you will need to type in the new code.

Step 3. Save your **recovery code**.

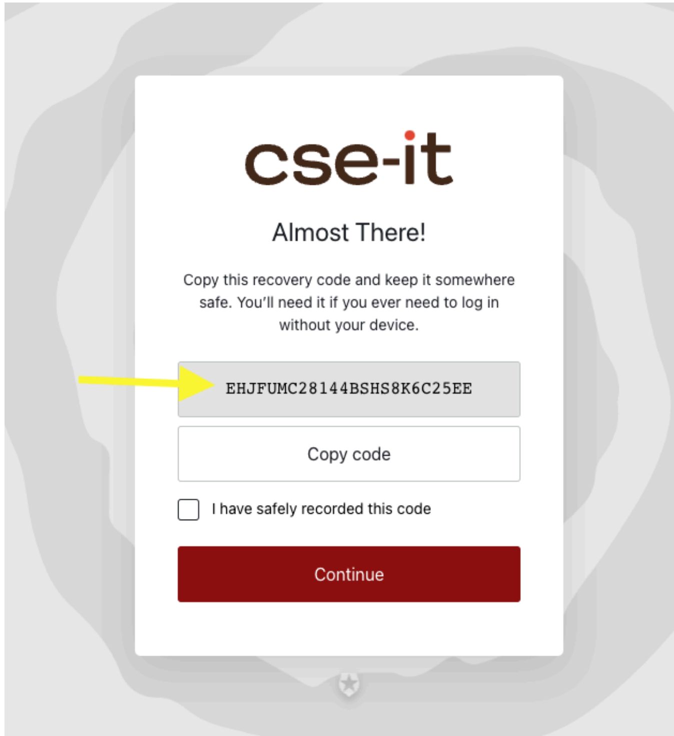
What is a recovery code? The **recovery code** is for one use only when you don't have access to your usual authenticator app.

- You forgot your phone that day
- You no longer have access to your app and need to get into the account (new phone or new computer)

Please note: the recovery code is NOT the one-time code. It is a **backup option** in case you cannot access your authenticator app.

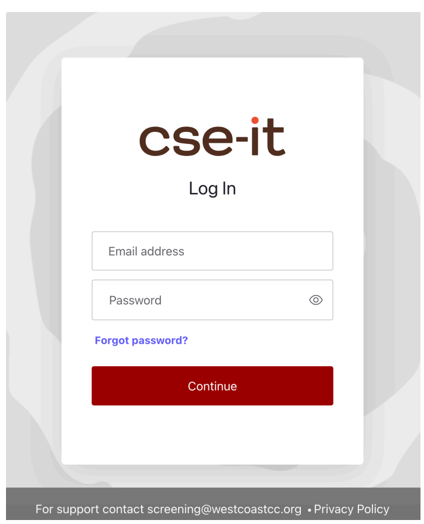
After enrolling the authenticator app with the one-time code, CSE-IT Online will provide a **recovery code**. Store the recovery code somewhere safe for future use as needed, such as a password manager. You can manually write out the recovery code, or click the **Copy code** button.

Check the box for **I have safely recorded this code.** Click the red **Continue** button. You will be logged into CSE-IT Online.

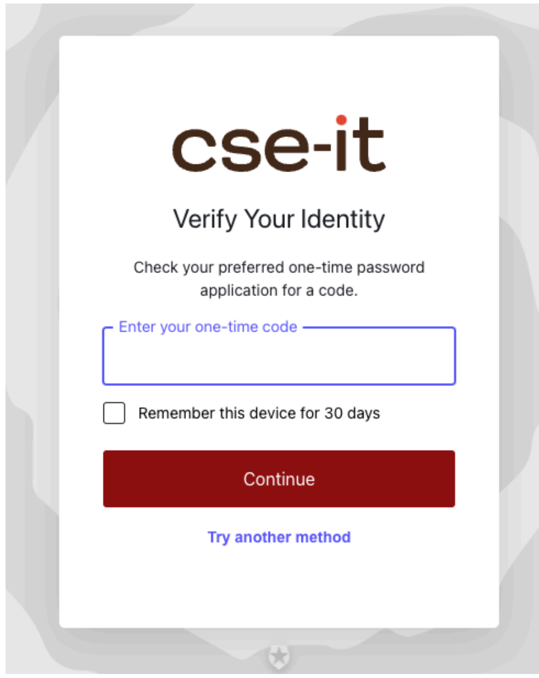


If you do not have your **authenticator app** and need to use your recovery code to get access to CSE-IT Online, please see **Troubleshooting** section **6.3. [I can't access my authenticator app]**.

Step 4. Login using MFA.
Enter your email and password on the CSE-IT Online login page.



If your email and password are entered correctly, you will be brought to the MFA page.



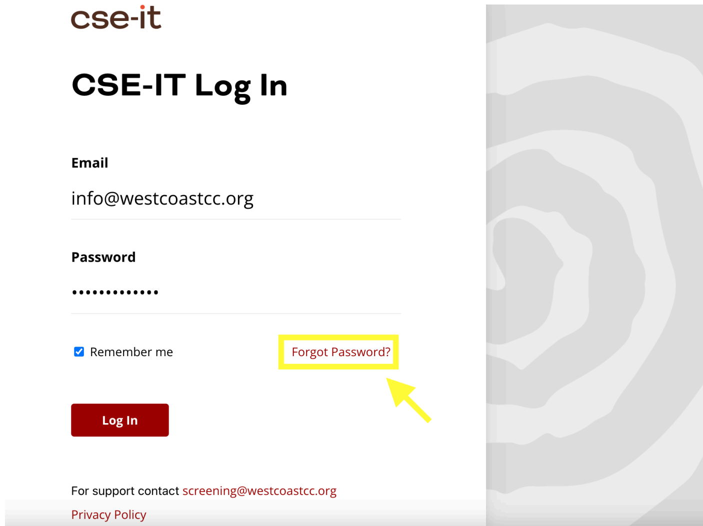
Use your chosen **authenticator app** (on your phone or desktop) to enter the **one-time code it provides** for CSE-IT Online.

Note: The one-time code is time sensitive. If you delay, the code on the app will change and you will need to type in the new one.

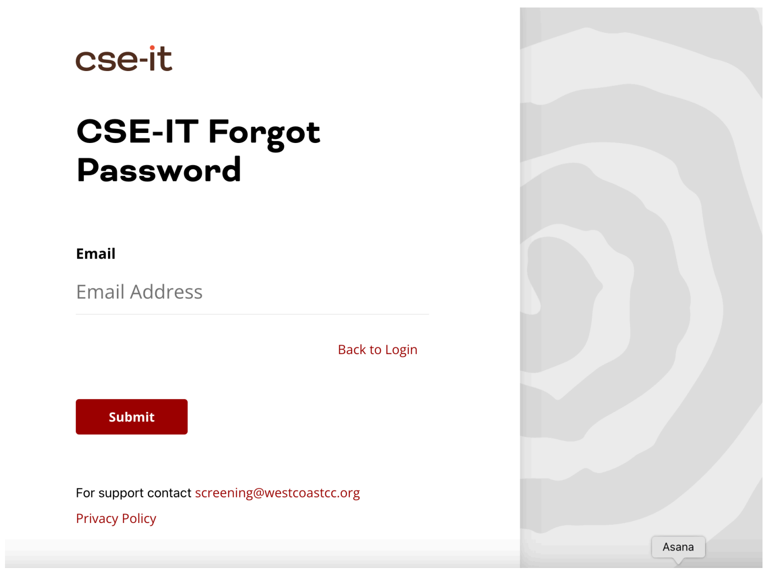
Check the box for **Remember this device for 30 days** to delay needing to use MFA on the same device for 30 days. Click the red **Continue** button.

3.1.4. Forgot password?

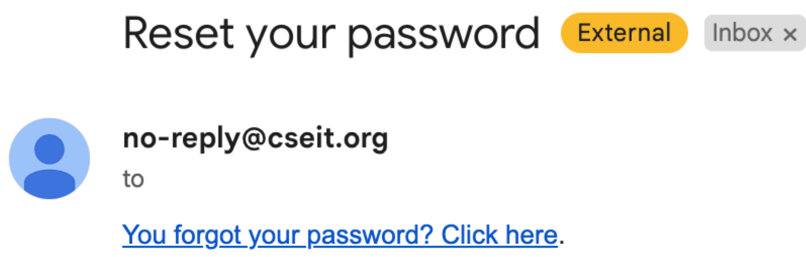
If you forgot your password, click **Forgot Password?** on the login page.



This will redirect you to a new page where you can enter your email.



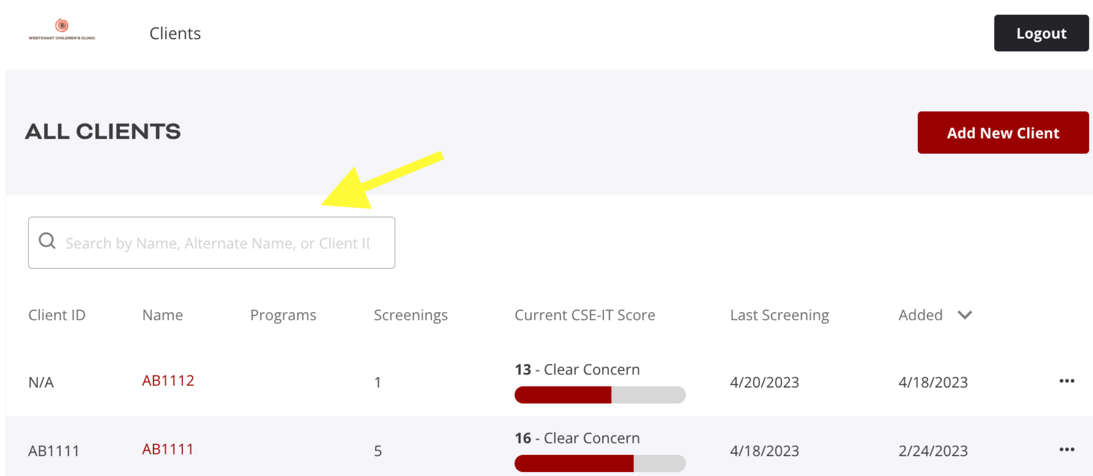
A link to reset your password will be emailed. Click the link; the process to reset your password is identical to the process to create your password (see Section 3.1.1. [Create a password]).



3.2 Clients

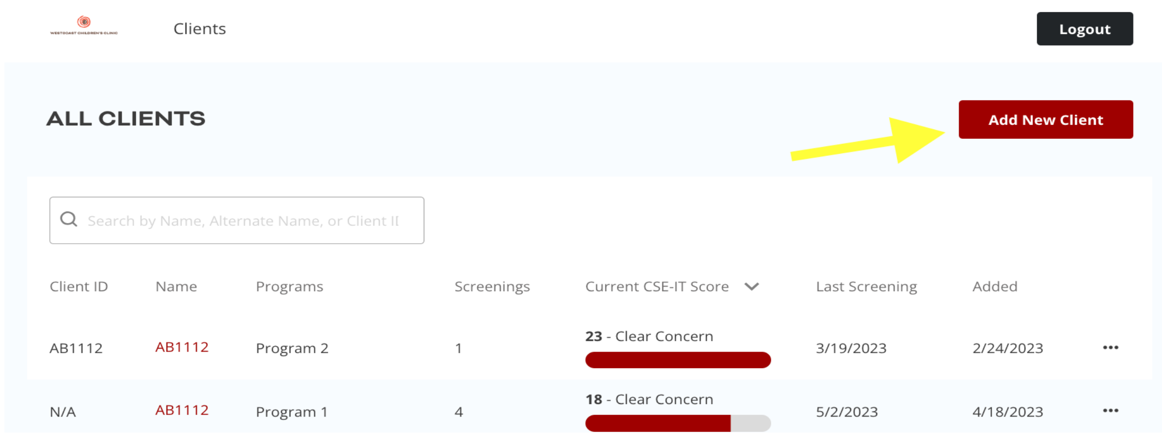
3.2.1. Search for a client

When you log in, you will see the **All Clients** page. Search for a specific client profile using the search bar or by scrolling through the list of clients. You may search for the client using their first name, last name, their first and last name, or their Client ID number.

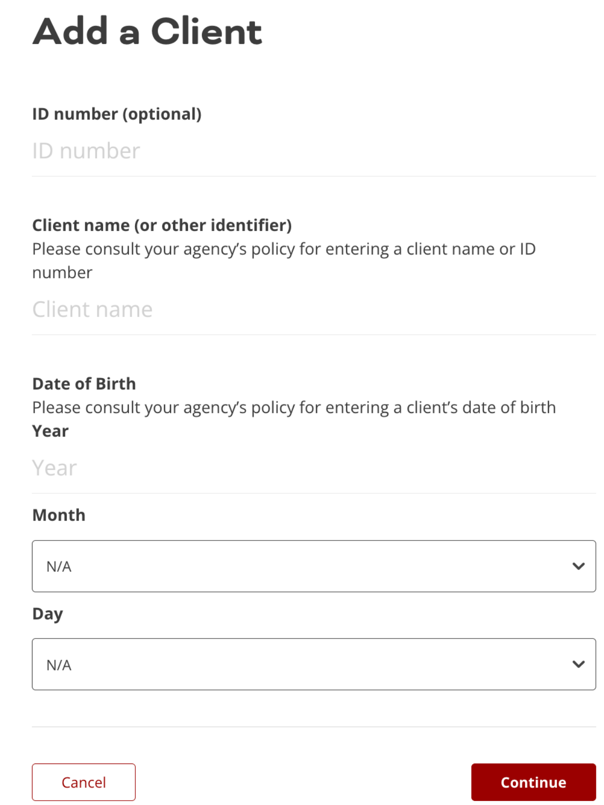


3.2.2. Add a client

If you can't find the client, you can create a new client profile. Click the large red button **Add New Client** on the top right of the page.

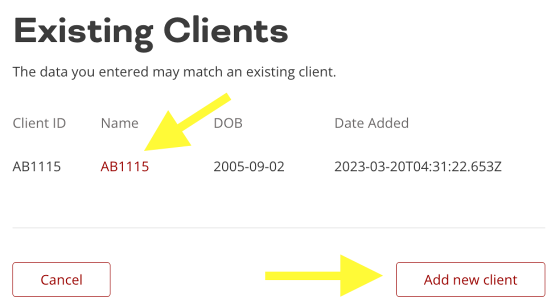


Fill in the required fields for a new client. **Please be sure to consult your agency's policy for how to enter client information.**



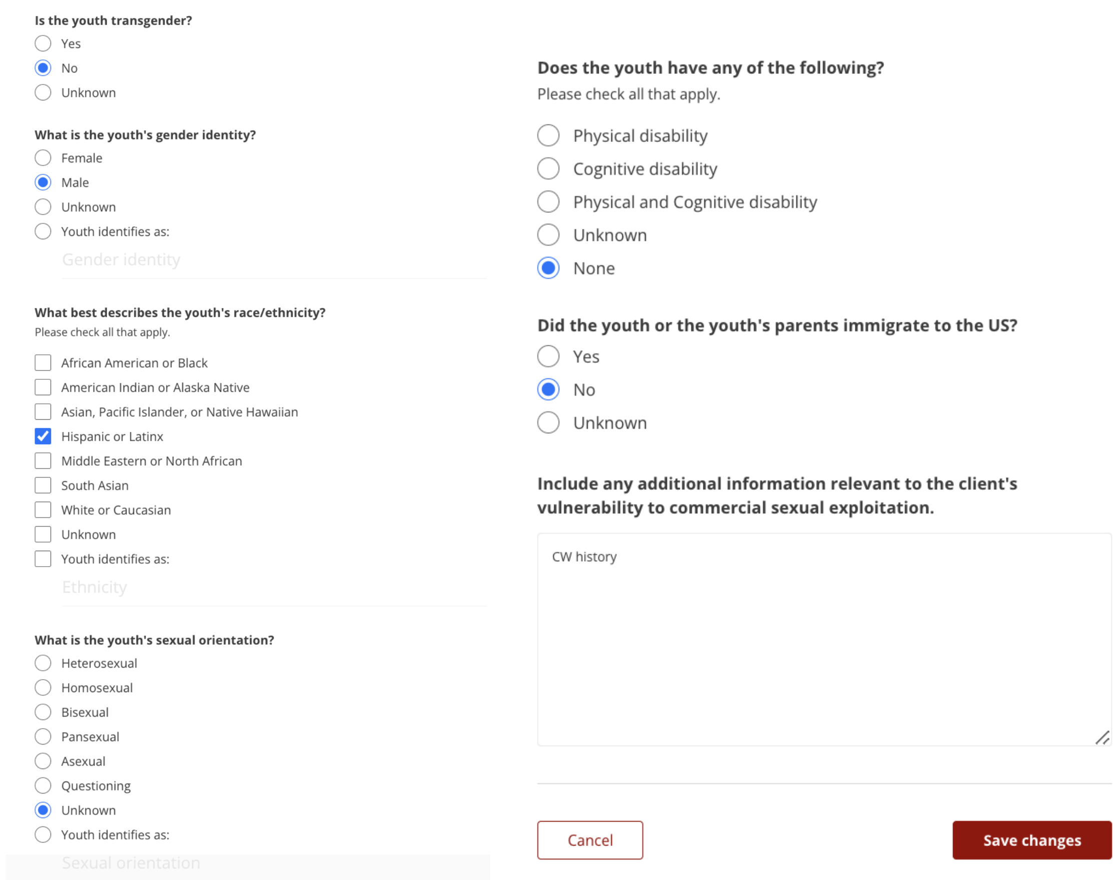
When adding a new client, CSE-IT Online will search the entire account to see if the information matches an existing client. This helps prevent duplicate client profiles. If it finds the same ID number or client name, you will be shown the **Existing Clients** page.

If you realize the client you are trying to add already exists, select the client by clicking on their **name/text in red**, or press **Cancel**. If the client you are trying to add is indeed a new client and doesn't already exist, press **Add new client**.



If you click **Add a new client**, you will be taken to the Client Information page to create a new profile. Fill in the demographic information as best you can.

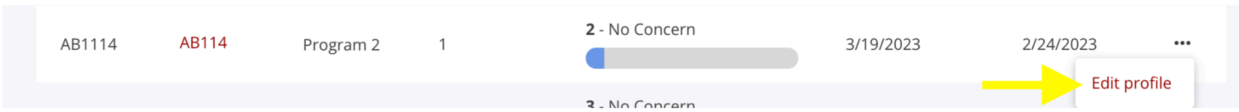
Note: Client info can be left as unknown and edited at any time. The profile can be edited at any time (see section 3.2.3. Edit a client profile).



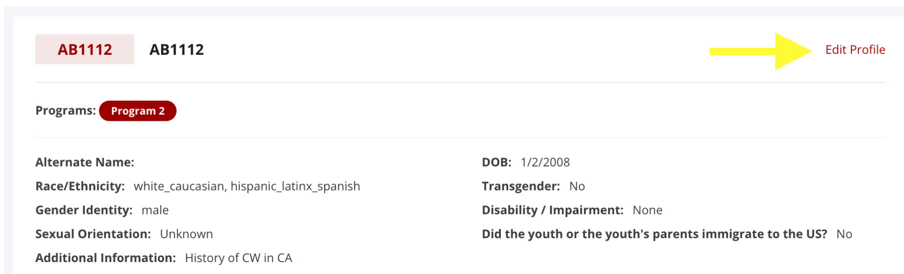
Be sure to click the **Save changes** button on the bottom of the **Client Information** page. This will save the client profile and add them to your **All Client** list.

3.2.3. Edit a client profile

You can edit a client's profile at any time. On the **All Clients** page, click on the **three horizontal dots** and select **Edit profile**.



Or, on the **All Clients** page, click on the name of the client in red text.
This will bring you to the client's profile. You can make changes to the client's profile by clicking **Edit Profile**.

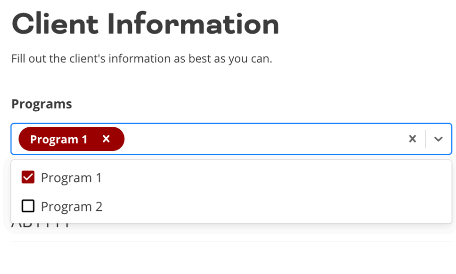


This will bring you to a new page where you can make changes to the client's profile. After making the changes, click **Save Changes** at the bottom of the page or **Cancel** to disregard the changes.

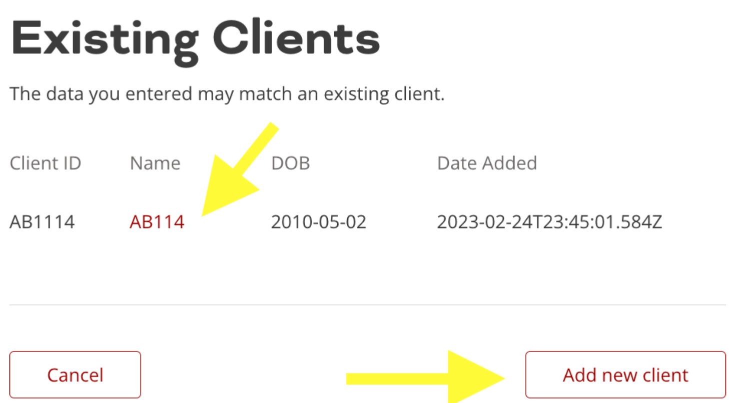
3.2.4. Add a client to your program

You can add a client to your program when creating a new client or from the Existing Clients list.

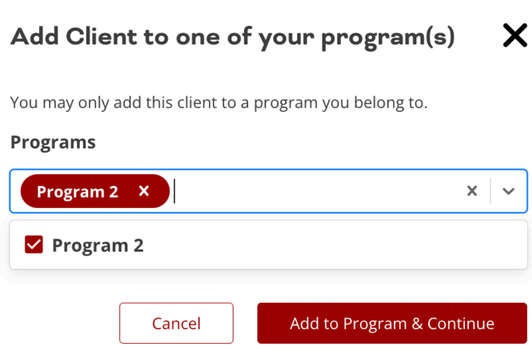
New Client- Search for your client. If you cannot find them, click **Create New Client.** After entering their initial information, you will be brought to the Client Information page to create their profile. Select your program from the drop down list. Fill in the client information and click Save Changes at the bottom of the page.



Existing Client- Search for your client. If you cannot find them, click **Create New Client**. CSE-IT Online will search the entire agency account. It will bring up a list of **Existing Clients** that might be the same client. If you do not see your client on this list, click **Add new client** to be brought to their client information page. If you do see your client on the Existing Clients list, select the existing client by clicking on their **name/text in red** to prevent client duplicates.



A pop up window will appear with a dropdown to add the client to your program. Check the box for your program, and click **Add to Program & Continue** to save this client to your program. They will now be included on the client list of this program for all users assigned to this program.



Note: Users can only add clients to their own program. **Only agency admins can remove clients from a program or add them to a program you are not in. A program admin can only remove a client from their program.** Please contact an admin for your agency's CSE-IT Online account if the client needs to be removed from your program/client list.

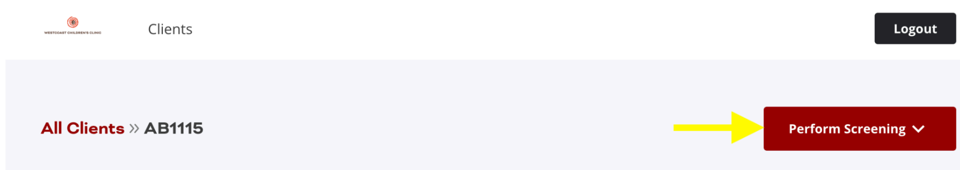
3.3 Screening

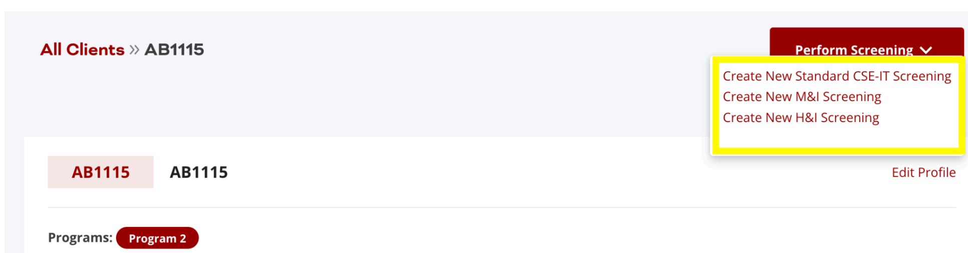
The CSE-IT in CSE-IT Online is the same as the paper version. It should be scored based on your training. Your CSE-IT Online account should have the CSE-IT versions by your agency.

- Standard CSE-IT Screening - standard/2.0
- H&I Screening - Hotline & Intake
- M&I Screening- Healthcare version, Medical & Intake

3.3.1. Complete a screening

Click on the client you would like to screen. Once in the client's profile, click **Perform Screening**. Select the version of the CSE-IT you need (varies by agency).





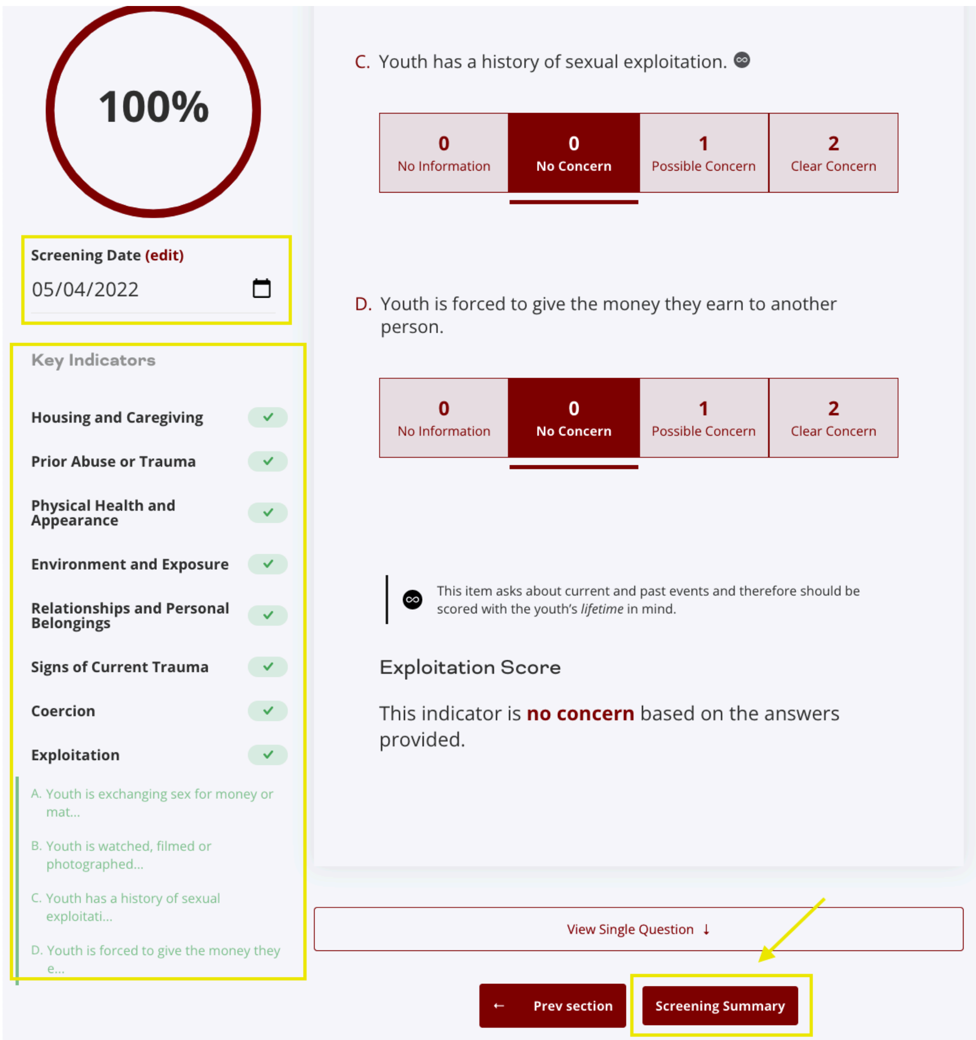
Complete the screening by scoring each statement (please refer to your CSE-IT Training).

The **Screening Date** will automatically populate the current date. If you are entering a screening completed on a prior date, click the calendar icon to change the date.

Tips:

- The screening will be saved **automatically as a draft** in the client screening history.

- **Multiple staff can work on the same screening**. Leave it as a draft for other staff to access in the client screening history.
- Look for missed statements shown in gray on the left side.
- Click on the indicators on the left to **jump between indicators.**

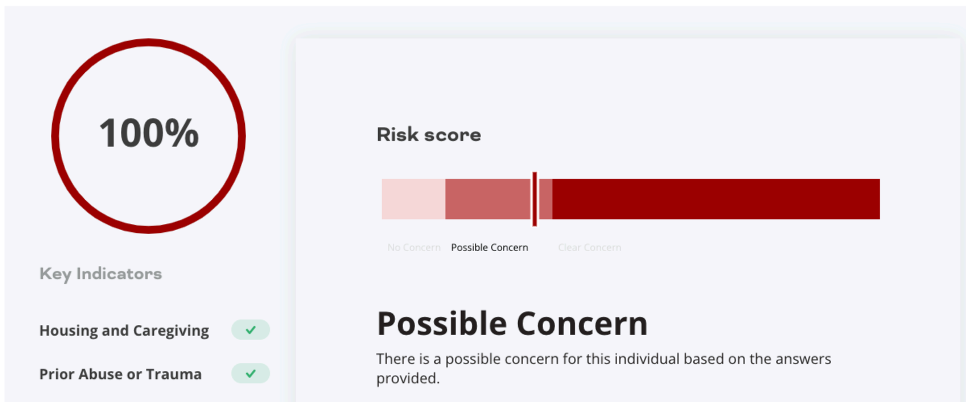


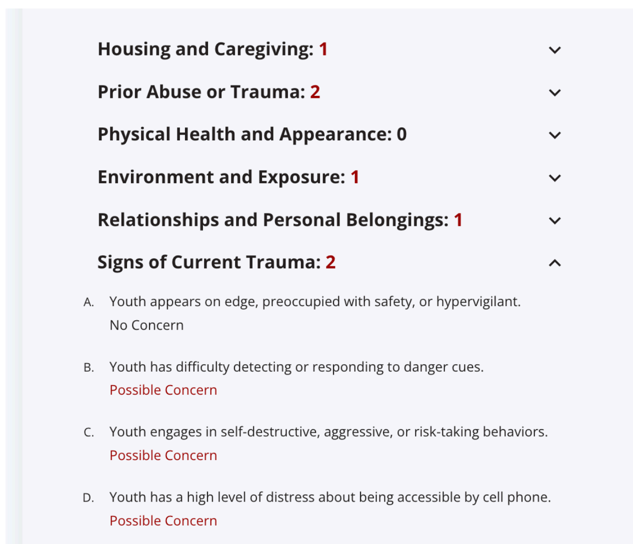
When you are done with the screening, make sure you are in the **Exploitation** indicator. If the **Screening Summary button is gray**, you missed a statement. Look on the left to find the statement and click it to complete. If the **Screening Summary button is red**, you have answered each statement.

Click the **Screening Summary** button to be brought to the Screening Summary page. The screening is still a draft at this point.

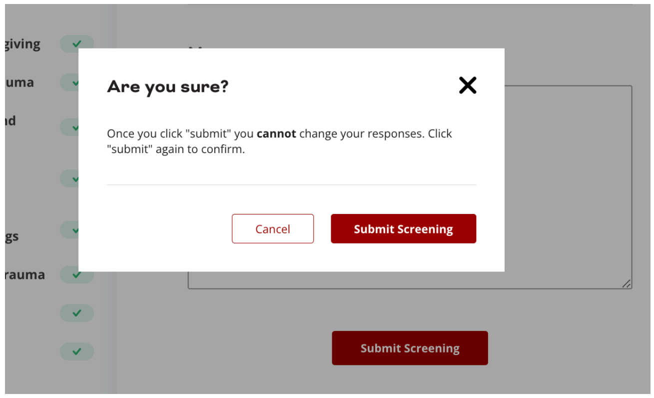
Tips:

- Use the visual to understand your client's level of concern.
- Click on the key indicators to see how you scored each statement.
- Enter information into the Notes box. This will show up on the exported PDF of the screening. Please consult your agency's policy for entering information into the Notes box.

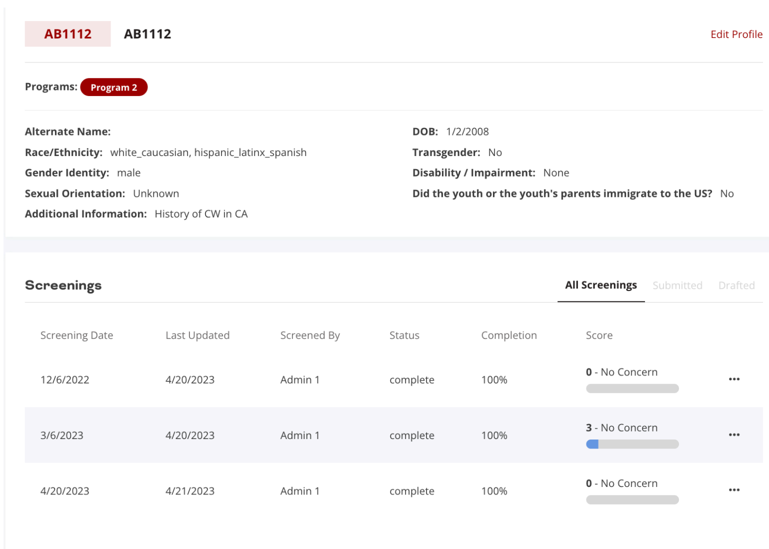




Once you are done with this page, you can submit the screening by pressing the **Submit Screening** button located at the bottom of the page. A pop up window will appear asking **Are you sure?** Once you submit the screening, it cannot be edited or deleted.

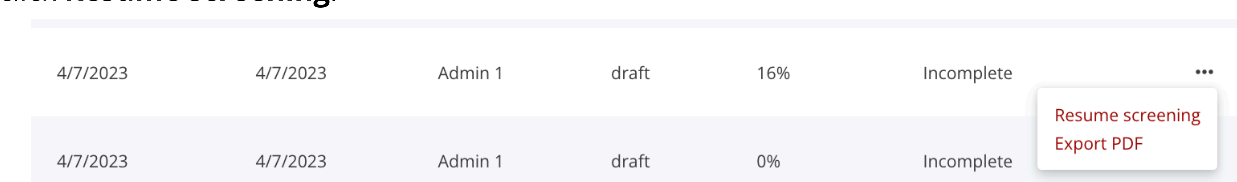


Click **Submit Screening** and you will be taken to the client profile. You will see your screening on the client profile screening history.



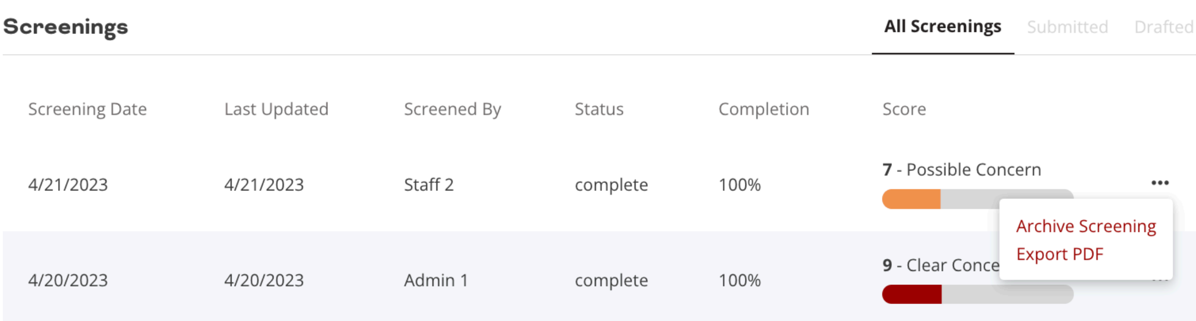
3.3.2. Resume an incomplete screening

Screenings automatically save as a draft. To resume a screening, go to your Clients list. Identify the client, click the three horizontal dots on the right-hand side, then click **Resume screening**.



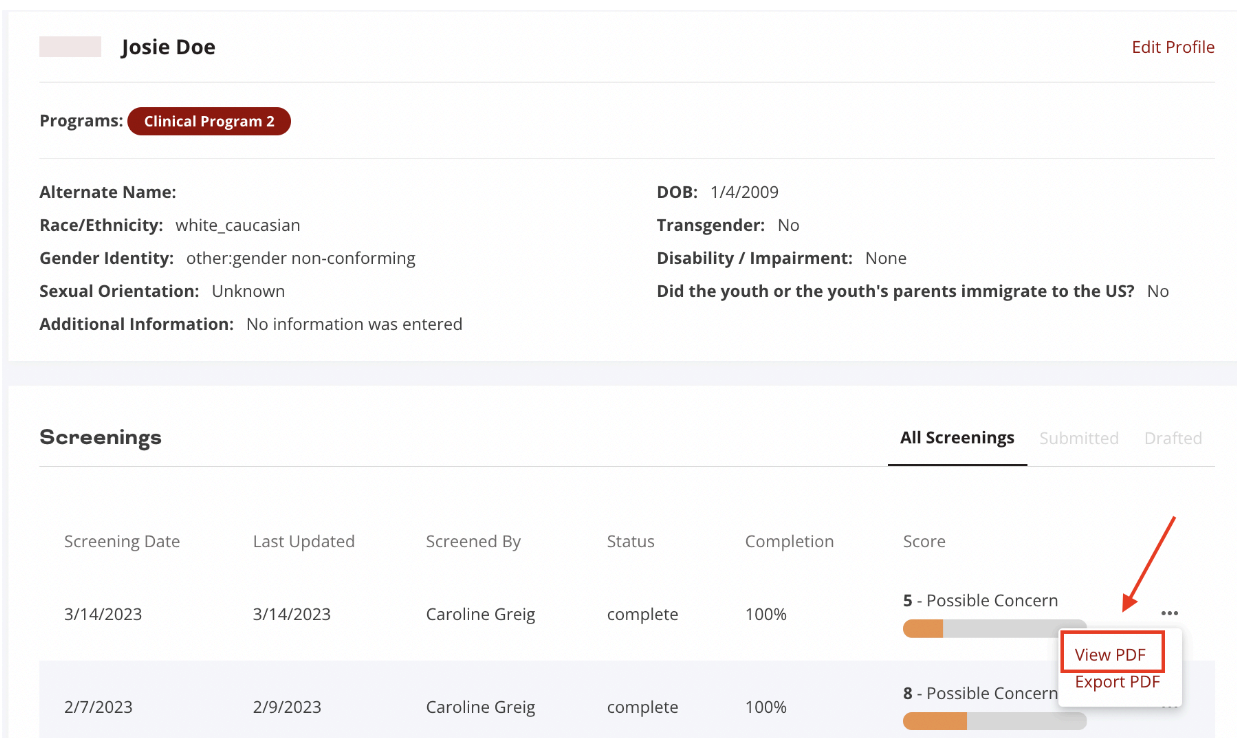
3.3.3. Export a PDF of a screening

You can export a PDF of any screening in the client's history. To export a PDF of a screening, go to your Clients list. Go to the client profile, identify the screening you would like to export, and click the three horizontal dots on the right-hand side. Then click **Export PDF**. Both drafts and completed screenings can be exported.

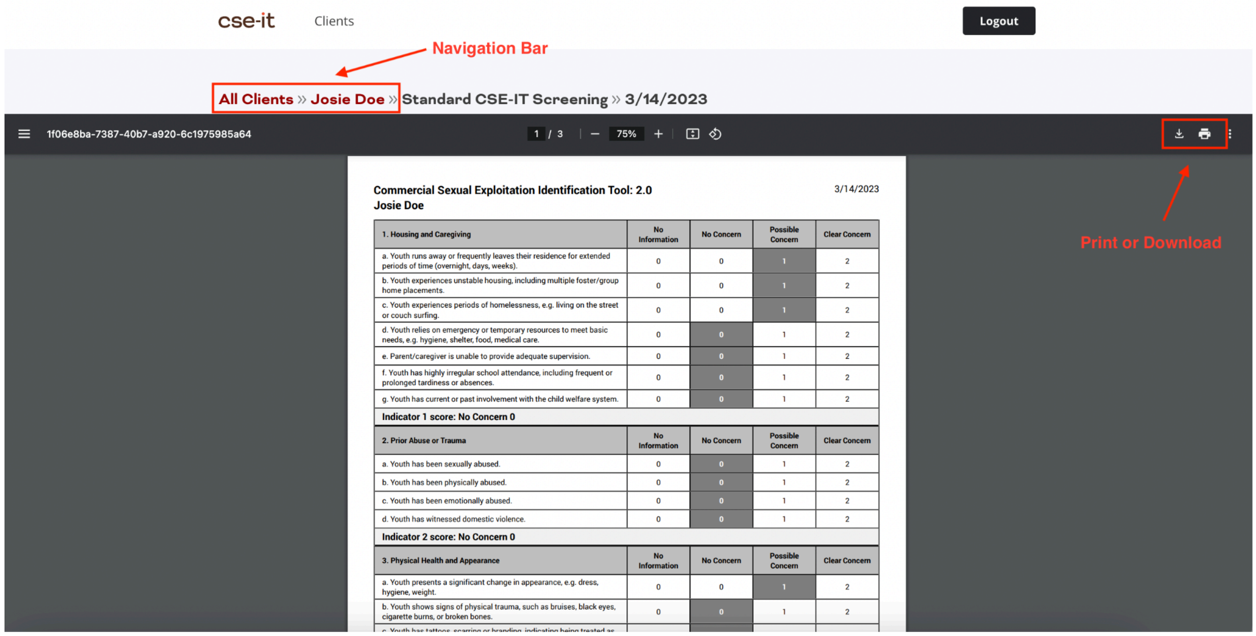


3.3.4. View a screening

Screenings can also be viewed both in completed and draft forms within the CSE-IT Online web app without having to download a pdf. To view a screening, go into the client's profile and click the three dots next to the screening you would like to view. Then click "View PDF":



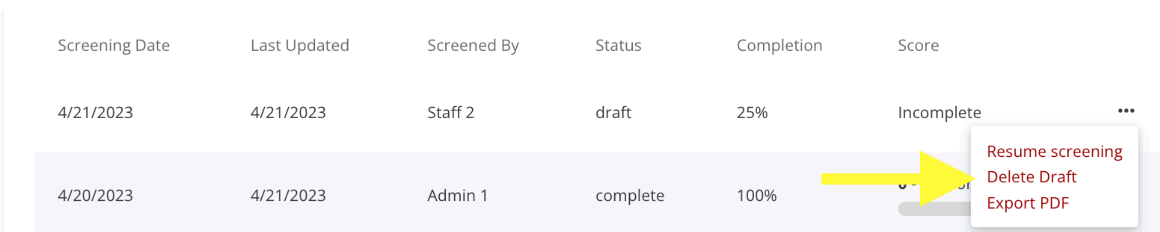
You will then be able to review the screening in the app. From this view, you can download the screening as a pdf or print it out. You can also choose to navigate back to the client profile or the client search page.



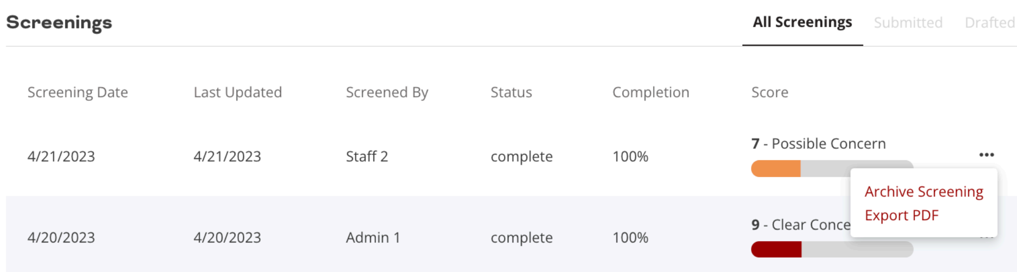
3.3.5. Delete an incomplete screening or archive a completed screening

If you need to remove a screening (for example, one entered for training purposes or with incorrect information), click the three horizontal dots to the right of the desired screening.

For an incomplete screening, you can click Delete Draft.



For a submitted screening, you can click Archive Screening.



Selecting either option will remove the screening from the client's profile and all data reports. We advise that **screenings not be archived unless there is a clear problem with the screening.** Screenings for a client that is no longer with your agency, for example, should **not** be archived in order to maintain records during the timeframe that their case was open.

4. T3 Certified Trainers

4.1. Use your site's CSE-IT Online account to train staff

T3 certified trainers can use CSE-IT Online to both demo scoring the CSE-IT as well as train new staff in how to enter a screening per their agency's protocol. This can be incorporated into your internal training.

4.1.1. Create a Demo/Training Client

You can create a demo or training specific client to your CSE-IT Online account to use for each training. Follow the process to create a new client (see section 3.2.2. Add a client).

Tips:

- Make sure to enter **Test or Demo** as the **ID number** so it can be easily identified in data reports pulled by your agency.
- Never use a real client's PII/PHI when creating a demo client.
- You can keep the screening history for the demo client to show the functionality of CSE-IT Online. They can be left as drafts or finalized.
- Determine if you will need to archive screenings or if your data point of contact will remove them in reports. **Note:** This is relevant if you submit the screenings and will impact the data dashboard as well as the raw data report.
- Confirm your agency's protocol for how to enter client info (ID, name, DOB, demographic info, etc). This can be shared during your training for new staff.

4.1.2 Create a Demo/Training Program

If the Programs feature is enabled in your CSE-IT Online account, you can create a **Training** program to specifically use to demo scoring the CSE-IT and entering screenings based on your agency's protocol. You can assign multiple trainers to the Training program.

Tips:

- Make sure to enter **Test or Demo** as the **ID number** so it can be easily identified in data reports pulled by your agency.
- Never use a real client's PII/PHI when creating a demo client.
- You can keep the screening history for the demo client to show the functionality of CSE-IT Online. They can be left as drafts or finalized.
- Determine if you will need to archive screenings or if your data point of contact will remove them in reports. **Note:** This is relevant if you submit the screenings and will impact the data dashboard as well as the raw data report.
- Confirm your agency's protocol for how to enter client info (ID, name, DOB, demographic info, etc). This can be shared during your training for new staff.

5. Troubleshooting

Start with your agency admin or program admin and look at the potential troubleshooting tips below. The problem may be easily resolved within your own agency. If the issue is not resolved, reach out to screening@westcoastcc.org.

5.1. Never received the invitation email

You create your login credentials via a link from an **invite email from cseit.org**. If you have not received the email, contact your agency admin. They should confirm your email in the account and resend the invite if needed.

If you still don't receive the invite email, restart your computer, log back into your email account, and check your junk and spam folders.

If you still don't receive the invite email, reach out to your agency IT department. It might be stuck in the firewall. They should add cseit.org to their white list to ensure staff get the invite email.

If you still don't see the invite email, reach out to screening@westcoastcc.org.

5.2. User's email was entered incorrectly

If an email is entered incorrectly for a user, the agency or program admin can archive the user then create a new profile. It is not possible for an admin to edit a user email if it is entered incorrectly (2.2.5. Archive and unarchive a user).

5.3. Missed the invitation window

You have **72 hours to create your login credentials** before the link in the invite email expires. Please reach out to your agency or program admin and ask them to resend the invite (section 2.2.2. Resend invite).

5.4. Error message on the login page

Please **clear your browsing history** and **refresh your browser**. Confirm you are using Chrome. **Type in cseit.org.** This should fix the error message.

If it does not, it might be that your invite email link has expired and you did not yet set a password for your account. Email your agency admin to resend the invite email and use the new link.

5.5. We found a duplicate client

UPDATE: This feature will be rolled out in August 2024.
Unfortunately, there is currently no way to combine duplicate clients. The screening histories will need to be combined manually.

Encourage users to search for their client and check the Existing Clients pop up window when creating new clients (see section 3.2.2. Add a client).

5.6. Our emails have changed

1. You can archive the users with old emails and invite users again with updated emails.
2. You can reach out to WestCoast who has the ability to edit emails. **Please note:** Depending on the number of user emails that need to be changed, WestCoast may need to charge an hourly fee for Technical Assistance.

5.7. When I try to invite a new user, it says they already exist

It could be that this user was in a different CSE-IT Online account with a different agency. CSE-IT Online will not allow a user with the same email to be entered into CSE-IT Online more than once, even if they are archived in the original account.

1. Use plus addressing (https://learn.microsoft.com/en-us/exchange/recipients-in-exchange-online/plus-addressing-in-exchange-online) to add a variation to their current email address. CSE-IT Online sees this as a new email, but the communication will still go to the original email account.

    Ex: jsmith@westcoastcc.org to jsmith**+cseit**@westcoastcc.org

2. If the **user has done 0 screenings in the old account**, WestCoast can ask the developer to remove that staff from CSE-IT Online. You will then be able to invite them as a new user. **Please note:** Depending on the number of user emails that need to be removed, WestCoast may need to charge a fee for Technical Assistance.

6. Troubleshooting Multi-Factor Authentication

Start with your agency admin and look at the potential troubleshooting tips below. The problem may be easily resolved within your own agency. If the issue is not resolved, reach out to screening@westcoastcc.org.

6.1. Where does my one-time code come from

Your **one-time code comes from your chosen authenticator app**. You should have enrolled in MFA with your authenticator app by scanning the QR code after you entered your email/password. The one-time code will now be listed in your authenticator app to enter after your email/password.

Please note: it will not be texted or emailed. The one-time code is found in your chosen authenticator app.

6.2. The one-time code from my authenticator app isn't working

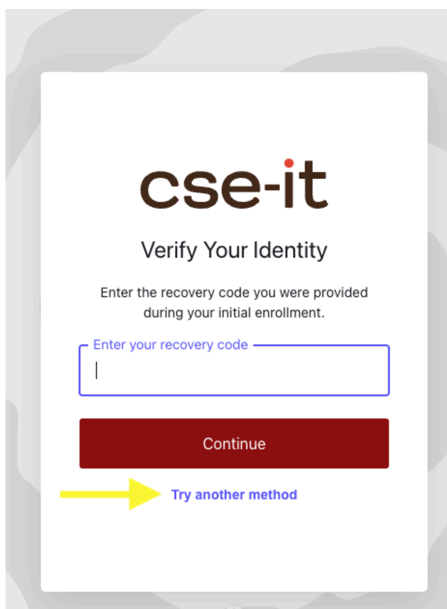
There could be a few reasons why the one-time code isn't working.

- Confirm that you enrolled your authenticator app specifically for CSE-IT Online. You **cannot use the same one-time code for different accounts** (eg your work email). See section 2.1.3. Enroll in MFA to get your app set up.
- **Enter your one-time code quickly**! The codes rotate within a certain timeframe. The one-time code visible in your app must be the same code when you hit **continue**. If the code changes before you click the red **continue** button on CSE-IT Online, you will need to retype it with the new one-time.
- The authenticator app and your computer may not be synced to the same time zone. Some authenticator apps have an option to sync in the settings. Your IT department can help you resolve this issue if it's your authenticator app and your computer.

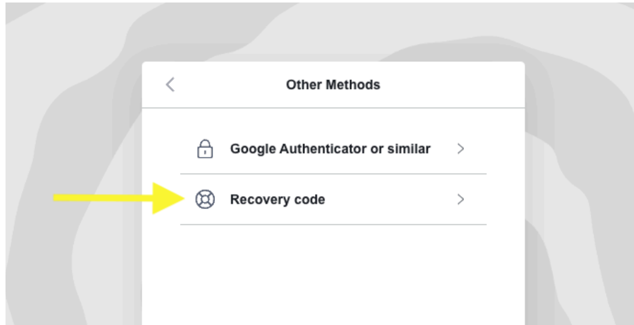
6.3. I can't access my authenticator app

There is a backup method to use a single use recovery code which is provided during your enrollment in MFA. You were prompted to copy the recovery code and save it.

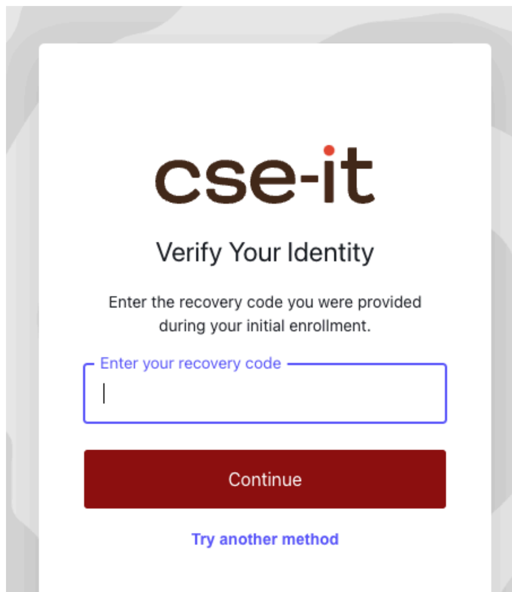
Enter your email and password on the main **Login** page. You will be brought to the **Verify Your Identity** page. Click **Try another method** under the red button.



Choose **Recovery code** as your method.

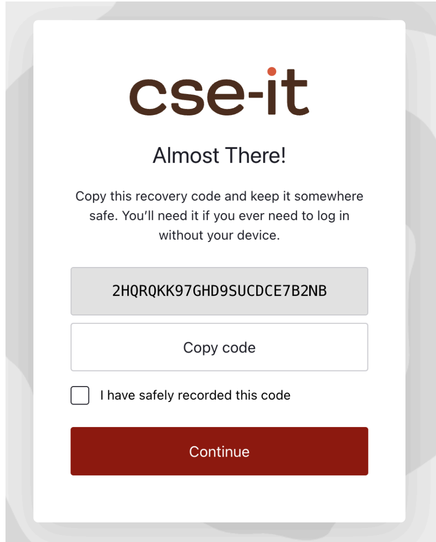


Enter your recovery code and click the red **Continue** button.



After entering your recovery code, you will be provided with a new one and your old code will become invalidated. **Recovery codes are single-use.**

Copy this new recovery code and save it somewhere safe. Check the box acknowledging you recorded it. Click **continue.**



You will now be logged into CSE-IT Online.

Note: The recovery code is a backup code for single use when you do not have access to your usual authenticator app. **For everyday use, use your chosen authenticator app on the one-time code.**

6.4. I no longer have my authenticator app and can't do MFA

If you have lost access to your authenticator app and do not wish to keep cycling through recovery codes, you need to contact CSE-IT Online support at screening@westcoastcc.org **to reset your MFA enrollment**. After doing so, you will be able to re-enroll with an authenticator app of your choosing.

Email- screening@westcoastcc.org

Example:
Subject: CSE-IT Online- MFA reset

I need my MFA to be reset. I no longer have access to my authenticator app and need to re-enroll.

6.5 I lost my recovery code and can't access my authenticator app

If you will not have ongoing access to your authenticator app AND you do not have your recovery code, reach out to screening@westcoastcc.org and ask for your MFA to be reset.

Example:
Subject: CSE-IT Online- MFA reset

I need my MFA to be reset. I can’t access my authenticator app and I do not have my recovery code. I need to access CSE-IT Online today.