

***Ethical Advocate***  
***Anonymous Online Incident Reporting***  
***Users Guide for***  
***Charter Manufacturing***

**Updated June 2014**

# **Users Guide for Anonymous Online Incident Reporting**

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## Create a User Account

**We suggest not using your organization's technology such as computers or phones to submit a report as usage can be tracked.**

1. Enter the appropriate Ethical Advocate (EA) incident-reporting assigned URL for

### Charter Manufacturing

<https://chartermfg.ethicaladvocate.com/>  
<https://chartersteel.ethicaladvocate.com/>  
<https://charterdura-bar.ethicaladvocate.com>  
<https://charterwire.ethicaladvocate.com/>  
<https://charterautomotive.ethicaladvocate.com/>

The screenshot shows the login page for Charter Manufacturing's Ethical Advocate system. The browser address bar displays <https://chartermfg.ethicaladvocate.com>. The page features the Ethical Advocate logo with the tagline "Confidential. Secure. Anonymous." and the Charter Manufacturing Company, Inc. logo. A language selection menu is on the left, listing various languages including English, Spanish, French, Italian, German, Chinese, Russian, Dutch, Portuguese, Swedish, Japanese, Korean, Dari, Pashto, Icelandic, Haitian Creole, and Farsi. The main login area contains a "Login" form with "Username:" and "Password:" input fields, a "Login" button, and a "Create Account ..." link. Below the form, there is a message: "If you are a new user, select 'Create Account'. If you are a returning user, insert the username and password you created when you established your new account. If you forgot your username or password, you will need to create a new account." At the bottom, there are links for "Charter's Welcome Letter", "Ethics Policy", and "Ethical Advocate Privacy Policy". Two red arrows originate from the "Login" button and the "Create Account ..." link, pointing towards the second and third items in the numbered list below.

2. If you are a returning user type in your user name and password and click 'Login.'
3. If you are a new user, click "Create Account" next to the log in box.
4. The Ethical Advocate system enables incident reporting in numerous languages. Determine the language you will use on the drop down menu
5. Create a username that is at least 6 characters long.
6. Create a password at least 8 characters long, containing a number and one special character other than a number or letter (for example, &\* %@+=). Retype password. See instructions below before typing password.

**The username and password are case sensitive, so it must be used exactly as you create it.**

The screenshot shows a registration form with the following sections:

- Username:** A text input field with a red arrow pointing to it. Below it is the instruction: "Please enter a username that is alphanumeric and at least 6 characters long."
- Password:** A text input field with a red arrow pointing to it. Below it is the instruction: "Please enter a password at least 8 characters long, containing a number and one special character other than a number or letter (for example, &:\*%@+=)."
- Retype Password:** A text input field.
- Disclaimer:** "For security reasons, your **username and password** are not retrievable. Please make sure to write down your username and password **in a secure location** for future use."

**When you create a User Name and Password, you must retain it for future use. For your benefit and anonymity the system does not collect information about you in any manner, nor can it identify you, and does not have the ability to retrieve a user name and password. Write it down and keep it in a safe, secure place.**

When you re-enter the system in the future, log in with your user name and password **exactly as you created it**. After three consecutive failed attempts the account is locked with no way to unlock it.

**Read the Terms of Use *THOROUGHLY*** and then check the checkbox at the bottom stating you agree to the terms. If you do not agree to the terms the system will not allow you to continue.

### **Changing Your Password**

1. Click the Password Change if you wish to change your password. Remember to record it and your user name in a secure place as it cannot be retrieved if lost or forgotten.



2. If you wish to change your password, enter your current password, the new password, and retype your new password.  
*Follow the password guidelines shown to the right when creating a new password*

3. Click Change Password when done.

**Password Change**

**Change Password**

Password:

New Password:

Confirm New Password:

Please enter a password at least 8 characters long, containing a number and one special character other than a number or letter (for example, &\*%#@+=).

**PASSWORD NOTE:**

**If you lose your user name and password, create another account following the instructions above. If your incident report is still open, that is, you have not received communication that it has been completed or closed, re-submit the report as a new incident report, describing the incident and everything you initially wrote as best you can.**

**In the last box on the reporting form, titled “Do you have any additional comments,” write that you have already submitted this report, but had to re-submit, as you lost your username and password. Ask that this new report be the one that is responded to.**

**30 Minute User Time Out:** Once you are creating a report you will notice a meter in the upper right quadrant of the page indicating the time you have left for the page you are on. When you progress to the next page of the report within 30 minutes it will renew. For security purposes the report will terminate if it reaches zero without the report being submitted or continuing to the next page. Even if you are typing on it, it will terminate in such an occurrence. Consequently we recommend you type out on a Word document what you want to say particularly with regard to the question “Please describe in detail the situation or event:” and then Copy and Paste it to the Report.

Should you be timed out you will need to start over with the username and password you created.

**Reviewing your report**

**When you complete the questions you will have the opportunity to review all the information you entered. Upon completing the review you will see the three buttons below. If you wish to make changes, click on the ‘Make Changes’ button and not the back button on your browser. When you are ready to submit the report, click the ‘Submit’ button. Once submitted the report cannot be edited but more information can be added.**

**If you wish to not submit the report, click the ‘Cancel’ button. None of the information will be recorded or kept in any manner; however your user name and password should be used by you if you wish to submit another report in the future.**

**When you submit the report a confirming dialogue box will appear on your screen. Without seeing this box, the report has not been submitted.**

### ***After You Submit a Report***

When you submit a report, it is entered in the Ethical Advocate secure database and an e-mail is automatically sent to a designated Issue Administrator at Charter Manufacturing saying a report has been submitted.

That person will go to the Ethical Advocate website to review the report. Only authorized Charter Manufacturing representatives can login to see the report.

The Issue Administrator will respond to you, through the website, that they have received the report. Depending on the circumstances, they might ask you for additional information, or to check back within a certain period.

**You must check back if you want to communicate, receive communication or find out the status of your report. Check back within a few days after you submit a new report, or add new information.**

### ***Report Manager***

After submitting a report, you will be taken to the *Report Manager* page, where you can view the report, add comments, and view or respond to comments or questions from the Issue Administrator (the person from your organization reviewing/investigating your submitted incident).

- When you submit a report, a notification e-mail will automatically be sent to an authorized incident reviewer for Charter Manufacturing.
- That person will go to the Ethical Advocate website, and using their administrative password, login to review the report.
- Only authorized people can login to get the report. When they review the report, they cannot identify the sender as the report is viewed through the Ethical Advocate web site.
- You and the reviewer can communicate with each other anonymously through the Ethical Advocate website or if available, by calling the toll-free number assigned to the plan and telling the Ethical Advocate agent what you want to have entered.
- The reviewer will respond to you through this section, that they have received the report.
- They might ask you for additional information, or to check back within a certain time period.

It is highly recommended you check back to communicate, receive communication or find out the status of your report.

When the review is final, the reviewer updates the Report Manager page that the report is complete, and depending on the circumstances and confidentiality, they may indicate outcomes.

1. Click the Report Manager link on the left hand side of the page.
2. Select the report you wish to open by clicking the folder icon.
3. If you wish to view the status history for this report click “view history”
4. To view your report click the pencil icon located next to the report.
5. You can download any files that you uploaded into the report by clicking on the filename.
6. You can append the report by clicking the *Add Append* button. Selecting Append will allow you to proceed through the original report and give new information where you want to. It does not change the original report, it appends it. For questions regarding this process, please return to the “File a Report” section.

### ***Adding Comments***

You can add comments by clicking on the *Add Comment* button. This is extremely important as it allows you and the Issue Administrator to communicate. This section enables anonymous questions and comments between administrator and submitter. Your identity can not be revealed through this mechanism and you remain anonymous as it is a dialogue box on the Report Manager page. Issue Administrators have their own version of the Comments box.

### ***Finishing Your Session***

When finished, make sure you know your username and password and if you have recorded it, keep it in a safe and secure place. Do not share your user name and password with anyone. You may want to print a copy of your report for your records before exiting. Remember to log out on the upper left side of the page. And remember to check back regularly as long as your report has not been resolved.

### ***Submitting Subsequent New Reports***

Should you wish to submit future (unrelated) reports, use your existing user name and password, as there is no need to create a new one.

You will be taken back to your account page; click on ‘Create New Report.’



**User Guidelines**

Whenever possible, use only secure networks/wireless systems to use Ethical Advocate’s incident reporting services. We suggest not using your organization’s technology such as computers or phones to submit a report as usage can be tracked.

If at any point you see or experience anything of a security concern in the system, notify Ethical Advocate as soon as possible with as many details as possible by sending a message to [support@ethadv.com](mailto:support@ethadv.com) or clicking on the “Contact EA” link in your browser. If you choose to contact EA in this way, please note the only way we can contact you is by your providing your name and a way to reach you.

