Service Canada College@HRSDC

Canada Pension Plan Statement of Contributions (SOC) Internet

Participant's Guide

Government Online

Table of Contents

Revision History

Date of change	Reason for the change (Example: New or change to FGP, New legislation, etc.)	Revision (Describe what has changed or been added)	Section Number (List sections that have been affected)	Page(s) affected
Aug 2013	Update, new format, new images due to website change	General update, new images and new format	SOC	All

About this Training Guide

Purpose

This training guide has been designed to familiarize you with the Canada Pension Plan (CPP) Statement of Contributions (SOC) Online service method of viewing and printing an official copy of the CPP statement of contributions. It will provide you with the necessary background and knowledge to:

- Understand how this application will be used by our clients; and

- Respond to client inquiries about this application.

Audience

This training guide is primarily intended for employees who answer questions related to the CPP Statement of Contributions Online service. This includes employees working in:

- Service Canada Call Centres;

- Service Canada Mail Processing Centres; and

- Service Canada Centres.

Prerequisites

As this guide only deals with the functionality requirement of this application, extensive background knowledge of Canada Pension Plan (CPP) and Old Age Security (OAS) online services is required. Ensure that you have completed these modules before you begin the SOC training:

- Introduction to NTP modules;

- Orientation to Income Security Programs (ISP);

- Worktools Overview;

- CPP/OAS Common Maintenance;

- Registration and Authentication (R&A) and Personal Access Code (PAC) training for online services;

- My Service Canada Account Computer Based Training;

- Specific training related to Citizen Service Officers; and

- Training for SDA Assist.

Learning Objectives

Upon completion of this guide, you will have a basic understanding of the CPP Statement of Contributions Online service, and be able to respond effectively to client inquiries about this service. Specifically, you will be able to respond to inquiries about:

- Viewing/printing an official copy of a SOC; and

- Requesting that an official copy of a SOC be mailed to a client.

Working with this Guide

This guide has been designed to demonstrate how the CPP Statement of Contributions Online service functions. Since you are already familiar with how to respond to client inquiries, this guide will only focus on how this application will affect your daily functions.

This guide offers a detailed view of the Internet components of the CPP Statement of Contributions Online service. Included are screen illustrations, detailed explanations of the process and other related information. Although you will not actually use the Internet component of the CPP Statement of Contributions Online service, you will be better equipped to answer client questions relating to it.

Completion Time

This guide will take you approximately 30 minutes to complete.

Learning Code

In order to have this training recorded in the list of courses that you have taken within the department, you must complete the Learning Report form – HRB2791 with the training code 25269. You can find the form on the electronic forms.

You can find the Learning Report on Electronic Forms at http://forms-formulaires.prv/eform99/index.cfm?App=Launch&FormID=4149&GroupID=201&LANG=E

Comments and Suggestions

If you have any comments or suggestions about this module, please send an email to the Operational Training Group at Service Canada College at the following email address: NC-OTG_INQUIRIES-GFO_DEMANDES-GD

Introduction to the CPP Statement of Contributions Online Service

Background

The Government of Canada is committed to making government programs and services more accessible and convenient to clients via the Internet. Therefore we have the CPP Statement of Contributions Online service. This service provides self-service options to clients wishing to view and print an official copy of their Statement of Contributions.

Objectives

The objective of this online service is to make it possible for authenticated CPP contributors and beneficiaries (who are over age 18 and do not have their contribution records administered by the Régie des rentes du Québec), to perform the following activities:

- View and print an official copy of their Statement of Contributions; and

- Request an official copy of their Statement of Contributions be mailed to them.

Benefits

The benefit of this online service is that it allows clients to view and print an official copy of their CPP Statement of Contributions, thereby reducing costs for Service Canada. Specifically, this service offers:

- A secure and convenient method of viewing and printing an official copy of their Statement of Contributions;

- An alternative mode of delivery; and

- Easy access to retirement planning information.

Effects of Change

As clients become aware of and use the CPP Statement of Contributions Online service, we are anticipating client inquiries about this online service regarding:

- CPP Statement of Contributions Online and other Internet services; and

- Activities related to Personal Access Codes (PAC) and the access key.

Who can use this Service?

When a client attempts to access this service, all of the following conditions need to be met in order to gain access.

- The client must have a valid prime SIN.

- The client must have contributed to the CPP.

- The client must be over the age of 18.

- The client must not be deceased.

- The client must not have a fraudulent SIN.

- The client must have Earnings or CPP Contributions in the contributory period.

- The client must not live in Quebec if the client has any RRQ contributions.

- The client must have an address on file.

- The client must not have a foreign address if the client's last contribution was made to RRQ.

If any one condition is not met, the client will be denied access. In addition, the client will need to provide an access key. If the client is a first time user, they will need a Personal Access Code (PAC) in order to validate their identity. In order to do this, they will need a computer that meets our minimum computer requirements.

Internet Component Overview

Getting Started

The Canada Pension Plan Statement of Contributions Internet component is used by clients to access Service Canada's online applications. The next few pages demonstrate how this system is used by our clients.

Online applications are accessed from the Service Canada Internet site at: www.servicecanada.gc.ca

The client will select their language of choice from the screen above.

The CPP Statement of Contributions can also be accessed through the Human Resources and Skills Development Canada website. Follow the Service Canada link at: http://www.hrsdc.gc.ca/en/home.shtml.

From the Service Canada site, the client will then need to enter the Access My Service Canada Account in order to access My Service Canada Account.

The client will need to login using their access key and go through the Registration and Authentication process in order to gain access to their My Service Canada Account.

If you need to see the steps on how to register for an access key or how to login to My Service Canada Account or how to navigate the Service Canada Website, you can access the My Service Canada Account computer based training (CBT) at: http://intracom.hq-ac.prv/sc-college/eng/nodd/training/program/cbt/msca2/msca2-info.shtml. Select the *Launch CBT* link to start.

Registration and Authentication (R&A) and Personal Access Code (PAC) training for online services informs you of the R&A and PAC process.

Take Note: *My Service Canada Account will automatically timeout if left idle for more than 15 minutes. If this occurs before a transaction record is produced, the initiated request will not take effect.*

My Service Canada Account Welcome Page

Once the client has successfully completed the Registration and Authentication procedure, they will find themselves on the home page for My Service Canada Account. This is where they can access all the services that are available to them. The client's name and the date of their last login are displayed on the top of the page.

To access the CPP Earnings and Contributions screen, the client will need to select *View my Canada Pension Plan (CPP) contributions* link as seen above.

CPP Earnings and Contributions

The CPP Earnings and Contributions screen will list:

- The client's SIR name and date of birth;

- The date the earnings and contributions were last updated;

- The years the client contributed to the plan;

- The amount of the contributions;

- The client's pensionable earnings; and

- Notes associated with the contributions for that year.

If there is no data for a few consecutive years, the rows will be collapsed into one entry and the range of years will be shown in the year column, as seen in the screen shot below.

Take note: Since May 18, 2009, clients with a credit split are able to view their SOC online.

MARY BROWN

Date of Birth: *MMM YYYY*

Your CPP Earnings and Contributions provide a history of your earnings and contributions to the CPP (and to the Quebec Pension Plan, if you have contributed to both plans).

Earnings and contributions last updated on *DD MMM YYYY*

Year	Your contributions	Your pensionable earnings	Notes
2000	$1,045.44	$30,306.00	CS
2001	$1,496.40	$38,300.00	S, M
2002	$1,444.17	$39,100.00	M
2003	$1,309.80	$29,960.00	M
2004	$1,831.50	$40,500.00	B
2005	$1,861.20	$41,100.00	B, M
2006	$1,910.70	$42,100.00	M
2007	$1,861.20	$41,100.00	S, M
2008	$1,309.80	$29,960.00	S
2009	$1,496.40	$38,300.00	S
2010	$1,861.20	$41,100.00	S, M
2011	$1,496.40	$42,100.00	B
2012	$1,861.20	$42,100.00	M
2013	$1,910.70	$42,100.00	M
2013	$295.87	$42,100.00	P

Legend for Notes:
B – Below basic exemption | M – Maximum | P – Post-Retirement benefit | S – Self-Employed earnings | CS – Credit Split

Note:
- If any of this information is incorrect, please send us a correction.
- If you have filed your income tax return, your earnings and contributions for the current year may not yet be posted.
- Request a Statement of Contributions by mail

Return to My Service Canada Account home page

The client can select the *send us a correction* link which provides instructions on how to go about correcting their earnings and contributions information.

The client can print an official copy of their Statement of Contributions by selecting the printer icon on top of the page or in their toolbar.

Request a Statement of Contributions by Mail

The client can also request that a Statement of Contributions be mailed to them by selecting the *Request Statement of Contributions by Mail* link.

The client will be directed to the following page, informing them of the step they are about to take:

After the client selects the *Request Official Statement of Contributions by Mail* link, they are presented with the following page:

By selecting Submit, the client confirms that they would like a SOC mailed to them at the address shown. If the client wants to update their address, the client can select the *Is this address incorrect* link and they will be presented with directions on how to change their address.

View Estimated Monthly CPP Benefits

Now that the client has seen how much they have contributed each year, they will want to know how that translates into monthly amounts. To view their estimated monthly CPP Benefits amounts, they will need to return to the My Service Canada Account home page. To do this, they can select the *Return to My Service Canada Account Home page* link or select Home in the top navigation bar.

Estimated Monthly CPP Benefits

The client can then select the *View my estimated monthly CPP benefits* link if they wish to see an estimate of their monthly benefits based on their contributions.

The client will then be shown estimates of the CPP benefits they would receive if they were eligible to receive them today. The calculations are based on the individual's circumstance and the contributions made to date. If additional contributions are made, these estimates may change.

Featured Services   Accessibility   Help

Home > -------

Estimated Monthly CPP Benefits

Don't forget to
Log out
before leaving the site

MARY BROWN

Date of Birth: *DD MMM YYYY*

You are eligible for Canada Pension Plan (CPP) benefits because you have contributed to the CPP or to both the CPP and the Quebec Pension Plan. The amount of your benefits depends on how much, and for how long, you have contributed to these Plans. Your age when you start receiving your pension is also considered.

The monthly estimates below are based on our records to date and what you would receive if you were eligible to receive CPP benefits today. Please remember your estimates are based on your CPP earnings and contributions.

Estimated Monthly CPP Benefits as of *DD MMM YYYY*

Retirement pension

The maximum retirement pension monthly amount at age 65 for this year is: $960.00

If your pension were to begin next month,

- you could receive a monthly retirement pension of: **$433.60**

If *you* were 65 today,

- you could receive a monthly retirement pension of: **$716.43**

If *you* apply at the age of 60,

- you could receive a monthly retirement pension of: **$551.10**

If *you* apply at the age of 70,

- you could receive a monthly retirement pension of: **$931.36**

Notes:

- Your monthly retirement pension is based on your average earnings since January 1, 1966 or when you reached age 18, whichever is later. If your earnings or contribution changes, your monthly retirement pension amount may vary.
- You may apply to start receiving a retirement pension any time between the ages of 60 and 70.
- If you wish, you may use the Canadian Retirement Income Calculator. It will give you information on Canada's public pensions and help you estimate how much income you may need for your retirement, according to your personal financial situation.

Disability benefits

If you were determined by CPP to have a severe disability,

- you could receive: **$951.40**
- each of your dependent children could receive: **$208.77**

Survivor benefits

In the event of your death,

- your survivor 65 years of age or older could receive: **$429.86**
- your survivor between the ages of 45 and 65, or under 45 and either severe disabled or having dependent children, could receive: **$430.22**
- each of your dependent children could receive: **$208.77**
- your estate could receive a **one-time lump-sum** death benefit of: **$2,500.00**

Notes:

- The above monthly benefit amounts are estimates only. To receive a CPP benefit, you must apply 🖵.
- An accurate calculation of your benefits can only be made when we process your application.
- If you receive a CPP disability benefit or retirement pension combined with a survivor's pension, the amount will be adjusted. You cannot receive two full benefits.
- If you had children born after December 31, 1958, your estimates may increase provided you stopped working or reduced your earnings. If so, you may be eligible for CPP's child rearing provision which must be applied for at the same time as you apply for CPP benefits.

Return to My Service Canada Account home page

The client can view additional information from this screen by selecting the appropriate links. To return to the My Service Canada home page they

must select *Return to My Service Canada Account Home page* link located at the bottom of the page, or select Home in the top navigation bar.

Online Help

If the client needs additional information or explanation, they can select the *Help* link located at the top of each screen.

Selecting Help will provide the client with information related to the application they are currently using.

A new window will open and the client simply needs to scroll down to the required topic and select the link to display the desired information.

Here is an example of the SOC Help screen:

The client can select the title that corresponds to the additional information they are seeking. They will then be shown the answer or explanation.

Logout

The client should always log out of the application using the *Logout* link located on the top right of the screen. This option is available from each screen within the application.
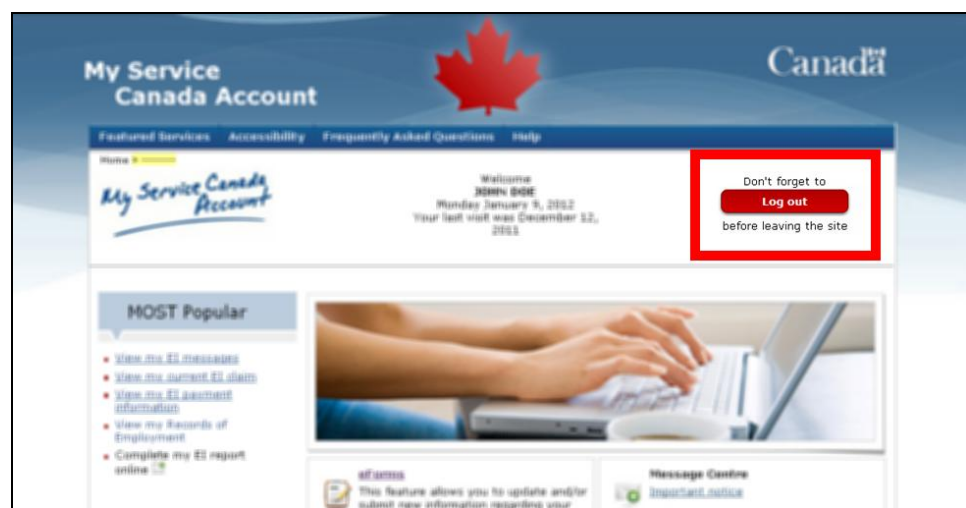
Take Note*: It is important for clients to fully logout of the application, clear their browser's cache, and close down their browser to ensure that no one else can access any personal information they may have entered.*

Appendix A

MSCA Call Centre Roles and Responsibilities

Call Centre	Roles and Responsibilities
GC Key Client Service Centre (CSC) **Toll-free: 1-855-438-1102 (Canada & US)** **Toll-free TTY: 1-855-438-1103** **Outside Canada and US** **1-800-2318-6290** ***Dial the international dialing code followed by the number** **Hours of service**: **24 hours / 7 days**	**To** assist **users with any items related to GCKey credential (e.g. GCKey login, GCKey registration, GCKey service browser requirements, etc.).** **To** refer **users to the SecureKey Concierge User Help Desk for difficulties with Secure Key Concierge and Sign-in Partner credentials.** **To** refer **users to R&A Help Desk for assistance with the** online registration and authentication **process** only**. This phone number appears as required in R&A online error messages when a user is** unsuccessful **during the Service Canada registration process (e.g. first login). This phone number is only meant for online authentication user support for the R&A pages – e.g. after the GCKey login/registration steps and should only be provided after it has been confirmed that the client requires assistance after successfully completing the GCKey and SecureKey Concierge registration or sign-in.** **To** refer **users to the Employment Insurance (EI) Call Centers if they require program related assistance or need to obtain an EI access code.** **To** refer **users to the Canada Pension Plan and Old Age Security (CPP/OAS) Call Centers if they require program related assistance or need to obtain a Personal Access Code (PAC).** **To** refer **users back to My Service Canada Account once they are able to login with GCKey.**
SecureKey Concierge User Help Desk (UHD) **Toll-free**: **1-855-433-5397** **Toll-free TTY**: **1-855-**	**To** assist **users who experience difficulties with Secure Key Concierge and Sign-in Partner credentials and answer their questions on the service and its partners.** **To** refer **banking clients to their banking institutions as required.** **To** refer **users to R&A Help Desk for assistance with the** online registration and authentication **process** only**. This phone number**

224-1714 Outside Canada and the United States **Toll-free: 1-800-7328-7358** ***Dial the international dialing code followed by the number*** **Hours of service: 24 hours / 7 days**	appears as required in R&A online error messages when a user is unsuccessful **during the Service Canada registration process (e.g. first login). This phone number is only meant for online authentication user support for the R&A pages – e.g. after the GCKey login/registration steps and should only be provided after it has been confirmed that the client requires assistance after successfully completing the GCKey and SecureKey Concierge registration or sign-in.** **To** refer **users to the GCKey Client Service Centre for any issues related to GCKey credential (e.g. GCKey login, GCKey registration, GCKey browser requirements, etc.).** **To** refer **users to the Employment Insurance (EI) Call Centers if they require program related assistance or need to obtain an EI access code.** **To** refer **users to the Canada Pension Plan and Old Age Security (CPP/OAS) Call Centers if they require program related assistance or need to obtain a Personal Access Code (PAC).**
Registration and Authentication (R&A) Help Desk **Toll-free: 1-866-279-5238** **Outside Canada and the United States: 1-506-548-7009** Hours of service: **Monday to Friday, 8:30 a.m. to 4:30 p.m. (caller's local time)**	**To** assist **users through the** online registration and authentication **process** only**. This phone number appears as required in R&A online error messages when a user is** unsuccessful **during the Service Canada registration process (e.g. first login).** **On the first login, an attempt can be unsuccessful for the following reasons:** **- a Social Insurance Register (SIR) record mismatch,** **- a user has tried 5 unsuccessful attempts to gain access and their SIN is now locked for 24 hours,** **- the wrong EI access code or PAC (for EI or CPP/OAS) was entered.** **On a return visit, during an identity validation attempt, an unsuccessful attempt can occur due to a restriction (also known as a flag) on the SIR.** **To** refer **users to the Employment Insurance (EI) Call Centers if they require program related assistance or need to obtain an EI access code.** **To** refer **users to the Canada Pension Plan and Old Age Security (CPP/OAS) Call Centers if they require program related assistance or need to obtain a Personal Access Code (PAC).**

To refer **users to the GCKey Client Service Centre for any issues related to GCKey credential (e.g. GCKey login, GCKey registration, GCKey browser requirements, etc.).**

To refer **users to the SecureKey Concierge User Help Desk for difficulties with Secure Key Concierge and Sign-in Partner credentials.**

To report **Service Canada systems technical issues to the IT National Service Desk**

NOTE: **There are some combined MSCA and ROE Web pages such as error codes, help link, etc. that Bathurst may receive calls from ROE Web users, please note that Bathurst is just to refer those users to the ECC, contact information listed below:**

Employer Contact Centre (ECC)

Toll-free : 1 800 367-5693

Toll-free TTY: 1-855-881-9874

Hours of service:
Monday to Friday, 7 a.m. to 8 p.m. (caller's local time) To assist clients with program specific questions regarding records of employment (ROE) and ROE Web online service options and to obtain an Activation Code

To assist clients with online support issues such as navigation and technical troubleshooting of ROE Web online products services.

To refer users to the GCKey Client Service Centre for any issues related to GCKey credential (e.g. login, registration, browser requirements, etc.).

To refer users to the SecureKey Concierge User Help Desk for difficulties with the Sign-in Partner login.

To report Service Canada systems technical issues to the IT National Service Desk as outlined in the Common Reference Tool.

Employment Insurance (EI) Call Centres	**To** assist **clients with program specific questions regarding Employment Insurance programs, online service options and to obtain an Access Code.**
Toll-free : 1 800 206-7218 **Toll-free TTY: 1 800 529-3742** Hours of service: **Monday to Friday, 8:30 a.m. to 4:30 p.m. (caller's local time)**	**To** assist **clients with general online support issues such as navigation and troubleshooting of MSCA and MEIIO Online services.** **To** refer **users to the Canada Pension Plan and Old Age Security (CPP/OAS) Call Centers if they require program related assistance or need to obtain a Personal Access Code (PAC).** **To** refer **users to the GCKey Client Service Centre for any issues related to GCKey credential (e.g. GCKey login, GCKey registration, GCKey browser requirements, etc.).** **To** refer **users to the SecureKey Concierge User Help Desk for difficulties with Secure Key Concierge and Sign-in Partner credentials.** **To** refer **users to R&A Help Desk for assistance with the** online registration and authentication **process** only**. This phone number appears as required in R&A online error messages when a user is** unsuccessful **during the Service Canada registration process (e.g. first login). This phone number is only meant for online authentication user support for the R&A pages – e.g. after the GCKey login/registration steps and should only be provided after it has been confirmed that the client requires assistance after successfully completing the GCKey and SecureKey Concierge registration or sign-in.** **To** report **Service Canada systems technical issues to the IT National Service Desk as outlined in the Common Reference Tool and SDA Assist.**
Canada Pension Plan and Old Age Security (CPP/OAS) Call Centres **Toll-free (English service): 1-800-277-9914** **Toll-free (French service): 1-800-277-**	**To** assist **clients with program specific questions regarding Canada Pension Plan and Old Age Security programs** **To** assist **clients with general online support issues such as navigation and troubleshooting of MSCA and CPP and OAS Online services (VUPI, TISO, SOCV, RTRa, PAC, CRIC).** **To** request **a Personal Access Code (PAC) on the client's behalf.**

9915 **From outside Canada and the United States:** **1-613-957-1954 (collect calls accepted)** **Toll-free TTY: 1-800-255-4786** Hours of service: **Monday to Friday, 8:30 a.m. to 4:30 p.m. (caller's local time)**	**To** refer **users to the Employment Insurance (EI) Call Centers if they require program related assistance or need to obtain an EI access code.** **To** refer **users to the GCKey Client Service Centre for any issues related to GCKey credential (e.g. GCKey login, GCKey registration, GCKey browser requirements, etc.).** **To** refer **users to the SecureKey Concierge User Help Desk for difficulties with Secure Key Concierge and Sign-in Partner credentials.** **To** refer **users to R&A Help Desk for assistance with the** online registration and authentication **process** only**. This phone number appears as required in R&A online error messages when a user is** unsuccessful **during the Service Canada registration process (e.g. first login). This phone number is only meant for online authentication user support for the R&A pages – e.g. after the GCKey login/registration steps and should only be provided after it has been confirmed that the client requires assistance after successfully completing the GCKey and SecureKey Concierge registration or sign-in** **To** report **Service Canada systems technical issues to the IT National Service Desk as outlined in the Common Reference Tool and SDA Assist.**
1 800 O-Canada **Toll-free: 1-800-622-6232** **Toll-free TTY: 1-800-926-9105** **Outside Canada and the United States**: **List of Toll free numbers available:http://www.servicecanada.gc.ca/eng/common/contactus/phone.shtml** **Hours of service**: **Monday to Friday, 8**	**To** assist **callers with general enquiries regarding Government of Canada programs and services.** **To** refer **users to the GCKey Client Service Centre for any issues related to GCKey credential (e.g. GCKey login, GCKey registration, GCKey browser requirements, etc.).** **To** refer **users to the SecureKey Concierge User Help Desk for difficulties with Secure Key Concierge and Sign-in Partner credentials.** **To** refer **users to R&A Help Desk for assistance with the** online registration and authentication process only. This phone number appears as required in R&A online error messages when a user is unsuccessful **during the Service Canada registration process (e.g. first login). This phone number is only meant for online authentication user support for the R&A pages – e.g. after the GCKey login/registration steps and should only be provided after**

a.m. to 8 p.m. (caller's local time)	it has been confirmed that the client requires assistance after successfully completing the GCKey and SecureKey Concierge registration or sign-in **To** refer **users to the Employment Insurance (EI) Call Centers if they require program related assistance or need to obtain an EI access code.** **To** refer **users to the Canada Pension Plan and Old Age Security (CPP/OAS) Call Centers if they require program related assistance or need to obtain a Personal Access Code (PAC).** **To** refer **users to other Government of Canada departmental programs for questions that relate to the use or access of their online services and client validation.**
Social Insurance Number Registration Liaison and Enquiries Help Desk **Toll-free: 1-800-206-7218, Option 3** **Outside Canada: 1-506-548-7961** **Hours of service: Monday to Friday, 8:30 a.m. to 4:30 p.m. (caller's local time)**	**To** assist **users on all questions related to the confirmation of a SIN, Proof of Identity requirements to obtain one, lost or stolen SIN and/or identity, errors, amendments or omissions to the Social Insurance Register (SIR) database including any restrictions, release of information to various individuals, agencies (both federal and provincial) as well as private sectors (i.e. employers and banks).** **To** refer **users to the Employment Insurance (EI) Call Centers if they require program related assistance or need to obtain an EI access code.** **To** refer **users to the Canada Pension Plan and Old Age Security (CPP/OAS) Call Centers if they require program related assistance or need to obtain a Personal Access Code (PAC)**
National Service Desk (NSD) **Toll-free: 1-800-268-0408**	*For Service Canada Employees only. This number must not be given out to callers. NSD will not return calls to citizens.* **To** receive **requests from internal clients/agents** **To** refer **Service Canada system or application problems reports to IITB for resolution.**