Human Resources and Skills Development Canada

Ressources humaines et Développement des compétences Canada

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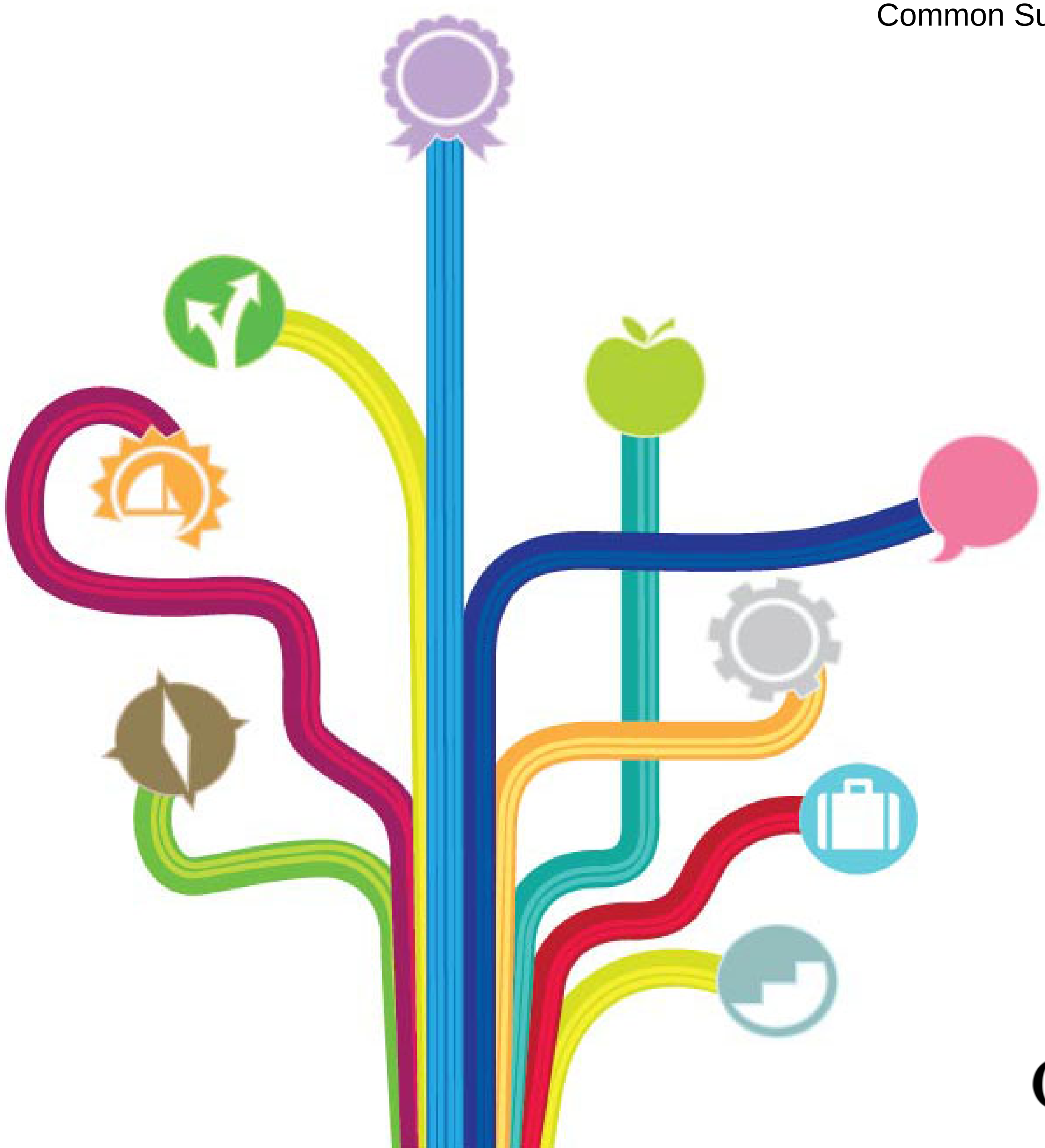
Excellence in Everything We Do

Service Canada College@HRSDC

View Access History - Intranet

Participant's Guide

Common Support Services



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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
September 2013	Update, new format, and new images because of website change	General update, new images from changed website, new format	View Access History	all

About this Training Guide

Purpose

This training guide will provide you all of the tools to assist clients when they navigate My Service Canada Account applications, The Access history screens are important because they show where the client has been and identifies points within the My Service Canada Account applications where they are experiencing problems. You will be able to assist clients by guiding them through the applications.

Audience

The intended audience is for those who respond to My Service Canada Account clients who experience navigation or access issues while using any of the My Service Canada Account applications such as VUPI and SOC.

Learning Objective

After completing this guide, you will be able to:

- describe the purpose of the View Access History
- illustrate how to navigate View Access History
- identify and resolve My Service Canada Account issues for the client.

Using this Guide

In order for you to get a good working knowledge of this tool, this guide will emphasize the importance of actually View History Access.

This guide will take you approximately one hour to complete.

For more information, please contact the Operational Training Group at: http://intracom.hq-ac.prv/isp-psr/learning/general/evaluateform_e.shtml

Learning Report

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.

Hand in your completed learning report form to your administrative person once you have completed this guide. Your training for will be input into, and tracked, in the Financial and Corporate Management Systems (CMS).

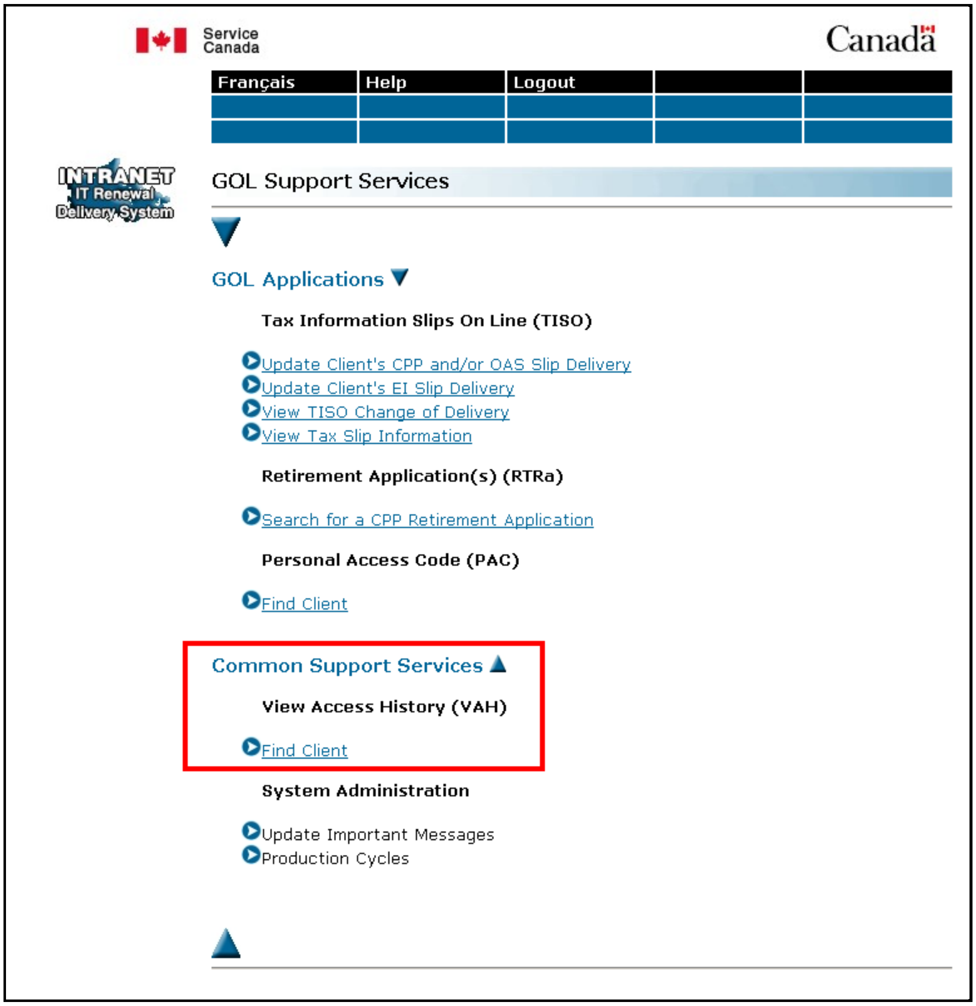
Common Support Services Section

View Access History

View Access History is the Government Online GOL intranet support service that displays data for each client using the Service Canada Online Services, View and Update Personal Information (VUPI) and Statement of Contribution (SOC).

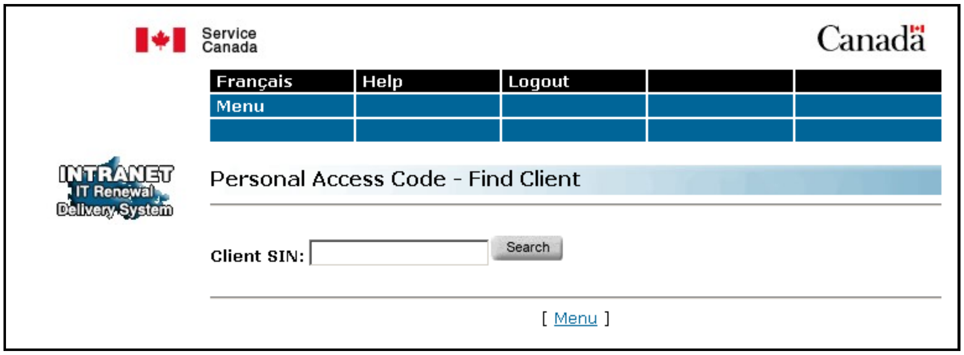
This service will enable you to respond to client inquiries regarding their access attempts into these applications.

To access the client history screen, select the Find Client link under the Common Support Services section:



View Access History – Find Client

Next, the View Access History–Find Client screen shown below will be displayed.



To display the client's record:

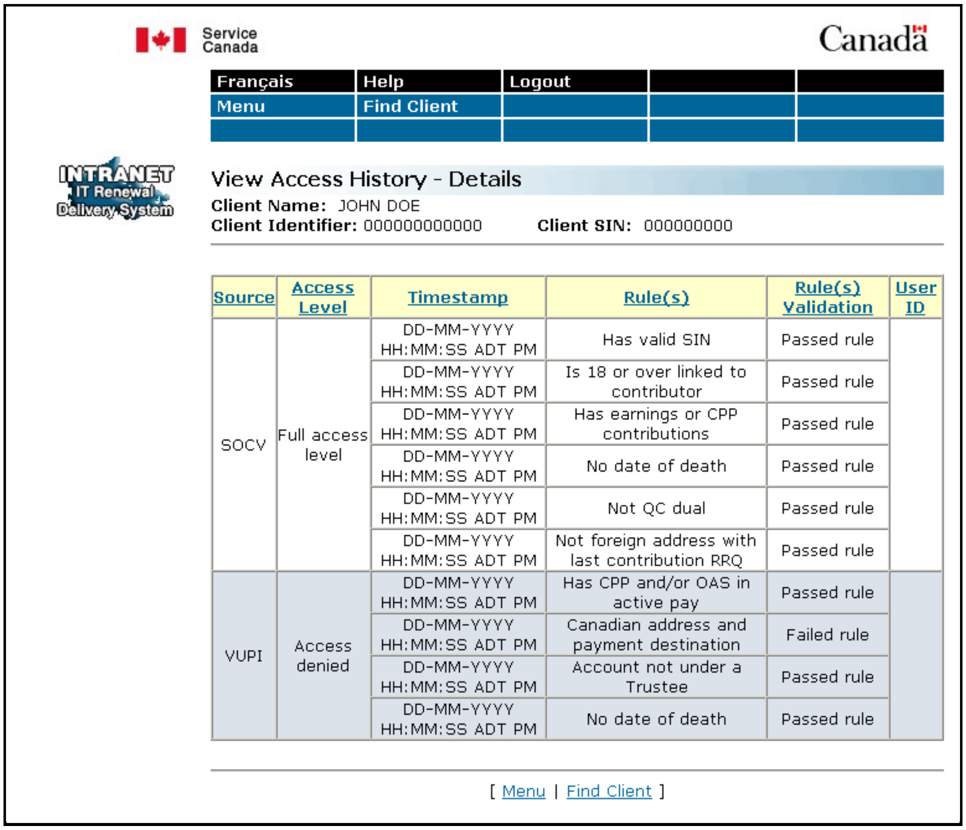
1. enter the client's SIN; and

2. select the SEARCH button.

View Access History - Details

The View Access History – Details screen shown below will appear. Notice that this screen includes the following information pertaining to the client:

- the client's SIR name;
- the client's identifier; and
- their SIN.


Service Canada
Canadä
Français | Help | Logout
Menu | Find Client
INTRANET IT Renewal Delivery System

View Access History - Details

Client Name: JOHN DOE
Client Identifier: 000000000000 **Client SIN:** 000000000

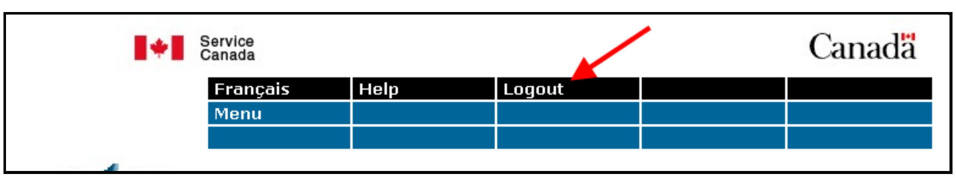
Source	Access Level	Timestamp	Rule(s)	Rule(s) Validation	User ID
SOCV	Full access level	DD-MM-YYYY HH:MM:SS ADT PM	Has valid SIN	Passed rule	
		DD-MM-YYYY HH:MM:SS ADT PM	Is 18 or over linked to contributor	Passed rule	
		DD-MM-YYYY HH:MM:SS ADT PM	Has earnings or CPP contributions	Passed rule	
		DD-MM-YYYY HH:MM:SS ADT PM	No date of death	Passed rule	
		DD-MM-YYYY HH:MM:SS ADT PM	Not QC dual	Passed rule	
		DD-MM-YYYY HH:MM:SS ADT PM	Not foreign address with last contribution RRQ	Passed rule	
VUPI	Access denied	DD-MM-YYYY HH:MM:SS ADT PM	Has CPP and/or OAS in active pay	Passed rule	
		DD-MM-YYYY HH:MM:SS ADT PM	Canadian address and payment destination	Failed rule	
		DD-MM-YYYY HH:MM:SS ADT PM	Account not under a Trustee	Passed rule	
		DD-MM-YYYY HH:MM:SS ADT PM	No date of death	Passed rule	

[Menu | Find Client]

To see what each heading means, you can click on the link or go to Appendix A. As well, Appendix B will give you more details on the different levels of access that a client may have to the various applications.

Logout of the View Access History session

For security reasons, you are required to exit the application at the end of each session. To do this, simply select the Logout link located at the top of the page when you are ready to exit the system.



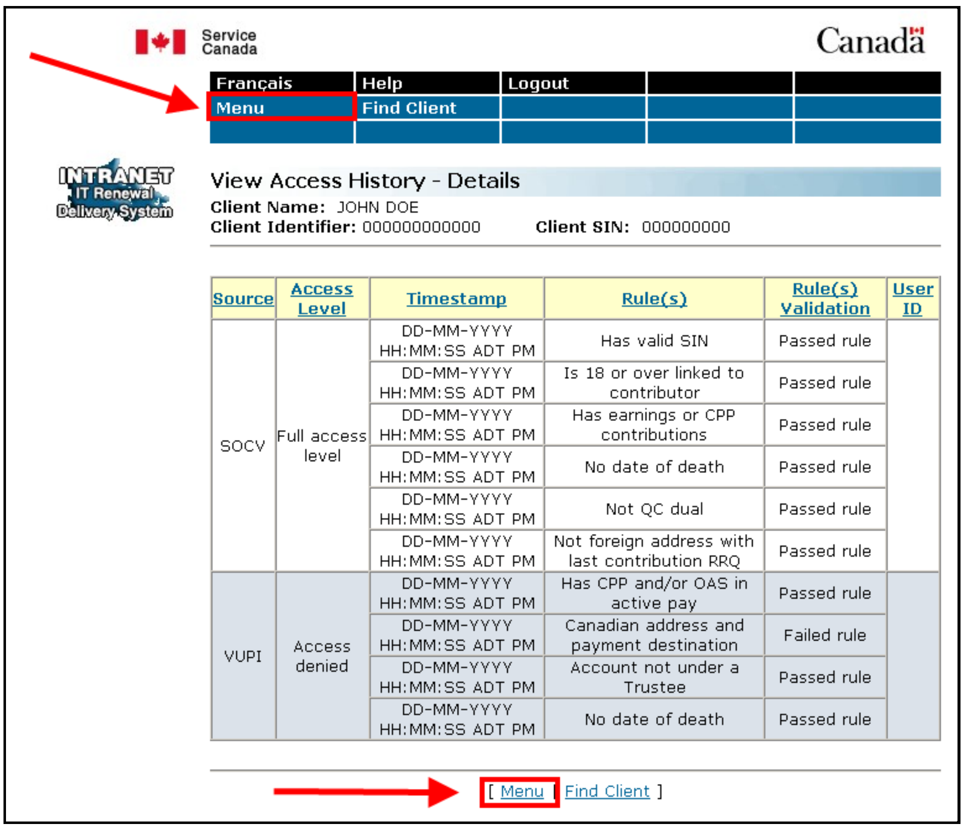
GOL Support Services Logout

When you exit successfully, the GOL Support Services Logout screen will be displayed.

Take Note: *If you leave the system idle for more than 20 minutes, you will automatically be logged out. If you logout before you have completed your transaction, the initiated change will be lost.*

GOL Support Services Menu

You can return to the GOL Support Services menu by selecting the Menu link on the Institutional Menu or the link located at the bottom of the page.



Source	Access Level	Timestamp	Rule(s)	Rule(s) Validation	User ID
SOCV	Full access level	DD-MM-YYYY HH:MM:SS ADT PM	Has valid SIN	Passed rule	
		DD-MM-YYYY HH:MM:SS ADT PM	Is 18 or over linked to contributor	Passed rule	
		DD-MM-YYYY HH:MM:SS ADT PM	Has earnings or CPP contributions	Passed rule	
		DD-MM-YYYY HH:MM:SS ADT PM	No date of death	Passed rule	
		DD-MM-YYYY HH:MM:SS ADT PM	Not QC dual	Passed rule	
		DD-MM-YYYY HH:MM:SS ADT PM	Not foreign address with last contribution RRQ	Passed rule	
VUPI	Access denied	DD-MM-YYYY HH:MM:SS ADT PM	Has CPP and/or OAS in active pay	Passed rule	
		DD-MM-YYYY HH:MM:SS ADT PM	Canadian address and payment destination	Failed rule	
		DD-MM-YYYY HH:MM:SS ADT PM	Account not under a Trustee	Passed rule	
		DD-MM-YYYY HH:MM:SS ADT PM	No date of death	Passed rule	

You can return to the GOL Support Services menu at any time you are in one of the Support Services by selecting the Menu link.

Appendix A

View Access History – Details screen: Headings and Descriptions

Heading	Description
Source	This column indicates the application to which the access history details are related
Access Level	Indicates whether the client's access level was Full, Limited or Denied. See Appendix B for access level details.
Timestamp	Represents the date and time that the access attempt was made. This information is listed in chronological order with the most recent attempt appearing first.
Rule(s)	This column indicates the specific rule that was checked by the system to verify the reason the client's access level was Limited or Denied.
Rule(s) Validation	This column indicates that the: • specific rule passed or failed the verification by the system; • client timed out of the application; or • client accepted or declined the Request To Access page.
User ID	This column indicates the user ID of the Agent that made the transaction. Note: this column will be blank when the transaction is completed by the client on- line.

Appendix B

VUPI - Access Levels

Access to view and update your personal information functionalities is determined by the client's CPP/OAS benefit record. The record then gives the conditions for the 3 types of access available to a client: full, limited and denied.

Full Access:

The client can view their payment amounts as well as change their address, telephone number and/or direct deposit information. For clients to have full access, all of the following conditions must be present:

1. Client must have a valid prime SIN;
2. Client must not be deceased;
3. Account must not be under the control of a Trustee;
4. Account must not be paid through bulk pay; and
5. Must have a CPP and/or OAS in active pay and/or OAS Benefit is pending:
    a) One and only one of the same benefit types are in active pay;
    b) Active CPP benefit in pay must be at least one of:
        i. RTR;
        ii. SVR;
        iii. DSB
        iv. ASG; or
        v. DCCB/ORP Child +18 (linked to the contributor's)
    c) Active OAS benefit in pay must be at least one of:
        i. OAS;
        ii. ALW;

iii. ALWS; or

iv. a combined OAS and GIS benefit.

6. All current and future addresses and payment destinations were or are domestic:

    a) Including IBFA (International Agreement) accounts; and

    b) Including direct deposit accounts.

Take Note*: There are exceptions to 5a:*

i. +18 and (-)18 children can receive up to two benefits of the same type (i.e. 2 ORP); and
ii. a guardian parent, in receipt of SVR or DSB may receive multiple -18 children's benefits, depending on the number of children in their custody (must be linked to SVR or DSB SIN).

However, the (-)18 benefit will not be used to determine if a client is in pay.

Limited Access:

The client can view records only; no modifications are allowed.

For the client to have limited access, all of the rules of full access apply except for rule 6 which becomes: all current and future addresses and payment destinations were or are *international*:

a) Including IBFA (International Agreement) accounts; and

b) Including direct deposit accounts.

Denied Access:

Denied access occurs when the client cannot access the system.

If any of the conditions for either full or limited access is not met, the client will be denied access to the system.

SOC - Access Levels

Access to view or print your statement of contributions functionalities is determined by the client's CPP benefit record. The record then gives the conditions for 2 levels of access: full and denied.

Full Access:

The client can view and print their statement of contributions or estimated monthly CPP benefits. For clients to have full access, *all* of the following conditions must be met:

- client must have a valid prime SIN;
- client must be over the age of 18;
- client must not be deceased;
- client must not have SIN fraud;
- client must have earnings or CPP Contributions in the contributory period;
- client must not live in Quebec if the client has any RRQ Contributions;
- client must have an address on file; and
- client must not have a foreign address if the client's last contribution was made to RRQ.

Denied Access:

The client cannot access the system.

If any of the conditions for full access is not met, the client will be denied access to the system.