

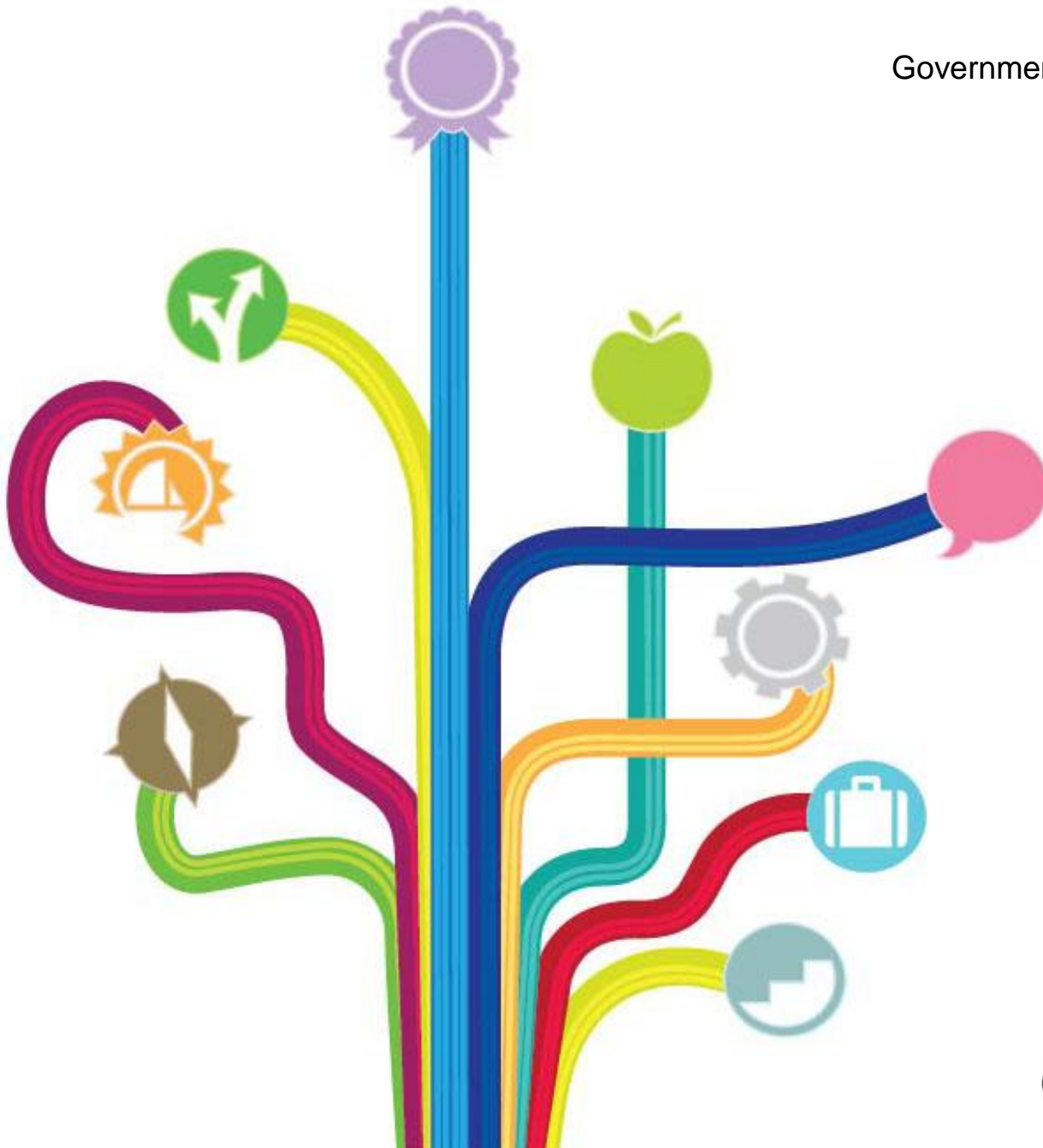


## Service Canada College@HRSDC

# View and Update Personal Information (VUPI) - Internet

## Participant's Guide

Government Online (GOL)





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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
May 2013	Update, new format, and new images because of website change	General update, new images from changed website, new format	VUPI	all



# Working with this Training Guide

## Purpose

This training guide has been designed to familiarize you with View and Update Personal Information (VUPI), Service Canada's online method of requesting a change to personal information currently in the Canada Pension Plan (CPP) and Old Age Security Pension (OAS) records. 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 their application.

## Audience

This Training Guide is primarily intended for staff expected to answer questions related to viewing and making changes to personal information. This includes employees working in:

- Service Canada Call Centres;
- Service Canada Mail Processing Centres; and
- Service Canada Centres.

## Learning Objective

Upon completion of this guide, you will have a basic understanding of the VUPI Internet service and be able to respond effectively to client enquiries about this service.

Specifically, you will be able to respond to enquiries about:

- viewing/changing an address;
- viewing/changing a payment destination;
- viewing/changing a telephone number; and
- viewing payment amounts.

## Using this Guide

This guide has been designed to demonstrate how the VUPI application functions. Since you are already able to respond to client enquiries, we will only focus on how this application will affect your daily functions.

Included are examples of screen shots with detailed explanations of the new process and other related information. Although you will not actually use the internet component of VUPI, you will be better equipped to answer a client's questions relating to it.

## Completion Time

It will take approximately 2 hours to complete this self-directed learning module.

## 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 View and Update Personal Information

## Background

The Government of Canada is committed to making government programs and services more accessible and convenient to clients via the Internet. As part of its Modernizing Service for Canadians (MSC) initiative, the former Social Development Canada (SDC) (now known as Human Resources and Skills Development Canada) introduced a new electronic service that allows recipients of Canada Pension Plan (CPP), Old Age Security (OAS), and clients whose first OAS payment is pending who live in Canada to view and update CPP and OAS address, telephone number and payment destination, view their net payment amounts and Opt-out of Old Age Security online. The development of this system focused on providing self-service options to clients that would result in an increased level of satisfaction and choice.

## Objective

The objective of this online service is to make it possible for an authenticated CPP and OAS client to perform the following activities:

- view and change their payment destination (cheque or direct deposit) for CPP and/or OAS;
- view and change their address and telephone number;
- view their monthly payment amount; and
- opt-out of Old Age Security.

## Benefit

The benefit of this online service is that it allows recipients of Canada Pension Plan (CPP), Old Age Security (OAS), and clients whose first OAS payment is pending who live in Canada to view and update CPP and OAS address, telephone number and payment destination, view their net payment amounts and Opt-out of Old Age Security online, thereby reducing costs for Service Canada. Specifically, this service offers:

- an alternate method of service to a client;
- a secure and convenient method of viewing and changing their personal information; and
- reduced number of change requests processed by CPP/OAS staff.

## Effects of Change

As clients become aware of and use the VUPI service, we are anticipating client enquiries about this online service regarding:

- VUPI and other Internet services; and
- activities related to Personal Access Codes, GCKey, and Sign-In Partner.

## Prerequisites

As this guide only deals with the functional requirements of this application, it is expected that you will already have extensive background knowledge related to CPP/OAS online services, and registration and authentication.

Ensure that you have completed these modules before you begin the VUPI training:

- [Introduction to NTP modules](#);
- [Orientation to Income Security Programs \(ISP\)](#);
- [Worktools Overview](#);
- [CPP/OAS Common Maintenance](#);
- [Registration and Authentication \(R&A\) training for online services](#);
- [My Service Canada Account Computer Based Training](#);

- Specific training related to Citizen Service Officers; and
- [Training for SDA Assist.](#)

## Who Can Use This Service

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

- The client must have a valid prime SIN.
- The client must not be deceased.
- The account must not be under the control of a Trustee.
- The Account must not be paid through bulk pay.
- All current and future addresses and payment destinations are domestic, including IBFA (International Agreement) accounts and DD. (A client who lives, or has lived outside of Canada, or who has their benefits deposited to a foreign bank account, can view the information but cannot make online changes at this time).
- The client must have CPP and/or OAS in active pay, or pending first payment.
  - Active CPP Benefit in pay must be at least one of:
    - RTR
    - SVR
    - DSB
    - ASG
    - DCCB/ORP Child +18 (linked to contributor's SIN)
  - Active OAS Benefit in pay or pending first payment must be at least one of:
    - OAS
    - ALW
    - ALWS
    - Or a combination of OAS and GIS



**Take Note:** Only one of the same benefit types is in pay. Exceptions: +18 and -18 children can receive up to two benefits of the same type i.e. 2 ORP; a guardian parent, in receipt of SVR or DSB may receive multiple -18 children's benefits, depending on number of children in custody (must be linked to SVR or DSB SIN); however, the -18 benefit will not be used to determine if the a client is in pay.

If any one condition is not met, the client will be denied access.

In addition:

- The client will need to provide an Access Key or SecureKey Concierge; or
- A first time user will need a Personal Access Code (PAC) in order to validate their identity; and
- Use a computer that meets our minimum computer requirement.

# Internet Component Overview

## Getting Started

The View and Update Personal Information application is found on the Service Canada Internet site: <http://www.servicecanada.gc.ca>



VUPI can also be accessed through other sites such as Human Resources and Skills Development Canada under the Service Canada link: <http://www.hrsdc.gc.ca/en/home.shtml>, and CRA under Change your address: <http://www.cra-arc.gc.ca/menu-e.html>

First, the client must select their language of choice.

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 GCKey or Sign-In Partner and go through the Registration and Authentication process in order to gain access to My Service Canada Account.

If you need to refresh the steps on how to register for GCKKey/Sign-In Partner 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.)



**Take Note:** All online services within My Service Canada Account expires if it has been inactive for 15 minutes. After 14 minutes and 30 seconds of inactivity (no mouse clicks), a pop-up, lasting 30 seconds, will appear with an option to extend the session for another 15 minutes. If the client does not acknowledge, they will be presented with a logout page. If this occurs before a transaction record is produced, the initiated request will not take effect.

## Welcome Screen

After going through the registration and authentication process, clients will be directed to the home page for My Service Canada Account. They can access all services from this page. Notice that the client's name is displayed on this screen.

Government of Canada / Gouvernement du Canada | Canada.gc.ca | Services | Departments | Français

### My Service Canada Account

Canada

Home > >>>>>>

Welcome **JOHN DOE**  
Monday January 9, 2012  
Your last visit was December 12, 2011

Don't forget to **Log out** before leaving the site

#### MOST Popular

- View my EI messages
- View my current EI claim
- View my EI payment information
- View my Records of Employment
- Complete my EI report online

**eForms**  
This feature allows you to update and/or submit new information regarding your claim.

**Message Centre**  
Important notice

View/Print | Change | Apply for | Other links

#### Canada Pension Plan (CPP) / Old Age Security (OAS) Pension

- View my CPP Contributions
- View my payment information
- View my estimated monthly CPP benefits

#### Employment Insurance (EI)

- View my EI messages
- View my payment information
- View my current claim
- View my past claims
- View my Records of Employment
- View EI publications

#### Other

- View my tax slip (T4E, T4A, NR4)

Screen Identifier: MSCA M 001  
Date modified: YYYY-MM-DD

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healthycanadians.gc.ca | travel.gc.ca | servicecanada.gc.ca | jobbank.gc.ca | actionplan.gc.ca

Canada.gc.ca

From the Welcome screen, the client will need to select Change tab This will give them access to the view and change options:

View/Print	Change	Apply for	Other links
<b>Canada Pension Plan (CPP) / Old Age Security (OAS) Pension</b> <ul style="list-style-type: none"><li>• <a href="#">View / change my payment destination</a></li><li>• <a href="#">Delay receiving my OAS pension</a></li><li>• <a href="#">View / change my address</a></li><li>• <a href="#">View / change my telephone number</a></li></ul>			
<b>Employment Insurance (EI)</b> <ul style="list-style-type: none"><li>• <a href="#">Change or view my agreement status (self-employed)</a></li><li>• <a href="#">View / change my direct deposit</a></li><li>• <a href="#">View / change my mailing address and telephone number</a></li><li>• <a href="#">View / change my province of residence</a></li><li>• <a href="#">View / change my preferred language for written communication</a></li></ul>			
<b>Other</b> <ul style="list-style-type: none"><li>• <a href="#">View / change my tax slip (T4E, T4A, NR4) mailing options</a></li></ul>			



**Take Note:** The links within this online service should be used to navigate within the application. Using the browser's back button to return to a previously viewed screen may cause application errors.



**Take Note:** Canadian residents who have an International Agreement in their profile are not able to modify their information. They are only able to view their information. They must call in order to request a change.



# Address

## View/Change my Address

This screen displays the current and future (if applicable) client address. The address field is mandatory; therefore, the option to delete a current address is not available. Changes made here will not modify the payment destination. To view or change a payment destination, clients need to select the View/Change my Payment Destination link from the My Service Canada Account home page.

Featured Services
Accessibility
Help

Home > -----

**Address** Don't forget to [Log out](#) before leaving the site

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**MARY BROWN**

To view or change your cheque address or direct deposit, choose **View/Change My Payment Destination** from the My Service Canada Account home page.

**Note:** Changes to your address must be made at least one month in advance. When choosing a future effective date, you must ensure the date you are choosing is one month greater than the month you are currently in.

If you provide the information close to, or past the first day of the month, you might have missed the cut-off date. We suggest that you [contact us](#) to verify that your change will take effect on the desired date before making any changes.

The *Canada Pension Plan* and *Old Age Security Act* require that you report:

- a change in your marital status;
- the death of a benefit recipient;
- a change of custody of your child or children under the age of 18;
- your departure from Canada for more than one month;
- your return to Canada;
- your moving from one country to another

If any of the above situations apply to you, and you have not yet notified Service Canada, you must [contact](#) the Department for assistance. From outside North America, you must [contact](#) the Department in writing or through your embassy. **Failure to do so could result in an overpayment or non-receipt** of benefits to which you may have been entitled.

---

**Old Age Security (OAS)**

<p><b>Current Address</b></p> <p>111 NAME STREET OTTAWA Ontario K1K 1K1</p>	<p><b>Future Address</b> <b>Effective on YYYY-MM-DD</b></p> <p>000 NAME STREET OTTAWA Ontario A1A 1A1</p>
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**Canada Pension Plan (CPP)**

<p><b>Current Address</b></p> <p>111 NAME STREET OTTAWA Ontario K1K 1K1</p> <p style="text-align: center;"><a href="#" style="background-color: #ccc; padding: 5px 10px;">Change</a></p>	<p><b>Future Address</b> <b>Effective on YYYY-MM-DD</b></p> <p>000 NAME STREET OTTAWA Ontario A1A 1A1</p> <p style="text-align: center;"><a href="#" style="background-color: #ccc; padding: 5px 10px;">Change</a>   <a href="#" style="background-color: #ccc; padding: 5px 10px;">Delete</a></p>
--	--

[Return to My Service Canada Account home page](#)

To change an address:

- determine which address needs to be changed (current or future);
- select the Change button located under the address.



**Take Note:** VUPI is designed to accommodate only one current address of correspondence per client. If our existing records contain a different address for CPP and OAS, VUPI will display both addresses. Once an address change is made using the VUPI service, both addresses will be changed to the address entered in VUPI.

## Changing an Address

VUPI will guide the client through the three step change of address process described below:

- Step one: enter the postal code for your new address;
- Step two: enter your new address; and
- Step three: confirm your change of address.

### Enter Postal Code – Step One

The first Change Address screen requires that the postal code be entered.

To change an address:

- insert the new postal code; and
- select the Continue button.



**Take Note:** The client can select the *Look up your postal code* link if they do not know their new postal code.

### Change Address

---

Answers to fields and questions with an asterisk (\*) are mandatory

**Step 1 of 3 - Enter the postal code for your new address**

**Note:** If you are unsure of your postal code you can look it up on the [Canada Post Web site](#).

\* Postal Code:  
(Example: K1A 2B3)

[Return to My Service Canada Account home page](#)

## Postal Code Accuracy

After the postal code is entered, it is validated against the address accuracy software endorsed by Canada Post. If the postal code cannot be validated, but is in the correct format, the client will see a warning “The accuracy of this postal code cannot be verified. Your postal code may be too new to be recognized by our online service. However, if you are certain that the information is correct, it will be used.” The client is then asked to confirm the postal code.

If the client is sure that the postal code they have submitted is correct (perhaps they are moving to a new area), the client can select the Continue button and move to the next Change Address screen.



**Take Note:** *The Accuracy of this postal code link displays more information about the postal code requirements.*

If the postal code they have submitted is incorrect, the client can select the link to Re-enter your postal code. They will then enter a new postal code and select the Continue button.

## Enter Your New Address – Step Two

Based on the postal code entered, a screen similar to the one shown below will appear. Notice that many of the address fields have been pre-filled based on the postal code.

**Change Address** Log out

before leaving the site

---

Answers to fields and questions with an asterisk (\*) are mandatory

MARY BROWN

**Step 2 of 3 - Enter your new address**

**Please note:** You may retain only one address for both OAS and CPP; therefore, your new address will be automatically applied to both programs.

\* Street Number:

Number Suffix:

Unit/Suite/Apt:

Delivery Mode:

Route Number:

\* Street Name:

\* City/Town:

Province:

Postal Code:

**Enter the date when your new address will take effect. Please note that the date can be no later than DD MMM YYYY: <-(6 month to the date)**

Day:  Month/Year:

Is your new address different from the options provided above?  
If so, do you want to:

- enter a different postal code?
- enter a different address for this postal code?

[Return to My Service Canada Account home page](#)



**Take Note:** Changes must be made at least one month in advance. When choosing a future effective date, the date entered must be one month greater than the month we are currently in. If the information is provided close to, or past the first day of the month, the cut-off date might be missed. Future changes can be made up to 180 days in advance

To complete the change of address process:

- complete the mandatory fields identified with an asterisk (\*)
- enter the date the change is to take effect (if applicable);
- select the Continue button.



**Take Note:** *If the client selects to change their 'current' address when they have a 'future' address listed, the effective date of the change will automatically be the date of the transaction (the client will not have the option to change the date).*

### **Enter a Different Address – This page is for illustration purposes only.**

If the address displayed on the previous screen was not correct, the client can correct it by selecting the Enter a different address for this postal code link from the bottom of that screen.

To change the address details:

- complete the mandatory fields;
- enter the date the change is to take effect (if applicable); and
- select the Continue button.



**Take Note:** *The client is warned that the application may not be able to verify the accuracy of the address they wish to use.*

### **Suggested Address**

If the address entered cannot be verified, VUPI may suggest a valid alternate address using the software endorsed by Canada Post. VUPI will display the Suggested Address screen showing the Address entered and the Suggested address. The client is given the option to choose the Suggested address or continue with the address entered.

[Log out](#)  
before leaving the site

**Suggested Address**

Answers to fields and questions with an asterisk (\*) are mandatory

MARY BROWN

**Note:** Your address is compared against Canada Post information for accuracy. However, in some cases, the system may not be able to verify the address's accuracy, when it is in fact just too recent to be recognized by Canada Post's system. Use this address if you are certain it is correct.

<p><b>Address entered:</b></p> <div style="border: 1px solid gray; padding: 5px; background-color: #f0f0f0;">           111 NAME STREET            OTTAWA            Ontario K1K 1K1            Effective on YYYY-MM-DD         </div>	<p><b>Suggested address:</b></p> <div style="border: 1px solid gray; padding: 5px; background-color: #f0f0f0;">           000 NAME STREET            OTTAWA            Ontario A1A 1A1            Effective on YYYY-MM-DD         </div>
--	--

\* Choose the address you wish to use:

Use what I entered  
 Use suggested address

If neither of these addresses is correct, you should [re-enter your address](#).

[Return to My Service Canada Account home page](#)

To complete the change of address:

- select the Re-enter your address link if the addresses displayed are incorrect; or
- select the check box located next to the correct address; and
- select the Continue button.



**Take Note:** VUPI will accept addresses that cannot be verified; however, mistakes or inconsistencies could result in delays. We strongly recommend that the client verifies that the address is correct before making a change.

If the street number is entered incorrectly, the client can enter a different street number by selecting Enter a different address for this postal code, as demonstrated earlier.

## Address Accuracy

If the accuracy of the address cannot be validated against the address accuracy software endorsed by Canada Post, the address the client entered will be shown on the next screen. The client is given two options:

- select Re-enter your address link to change the address; or
- select the Continue button to use the address displayed on the screen.

## Confirm the Change of Address – Step Three

Finally, the Change Address Confirmation screen is presented. It displays the original address in the From block and the new address in the To block.

Featured Services Accessibility Help

Home > -----

Transaction Confirmation

Don't forget to [Log out](#) before leaving the site

MARY BROWN

Thank you! Your request has been completed.

Please take note of the confirmation number or print this page for your records.

Transaction Date: DD MMM YYYY, HH:MM:SS EDT

Confirmation Number: 6333

Change of Old Age Security (OAS) Address

<b>From:</b> 111 NAME STREET OTTAWA Ontario K1K 1K1	<b>To:</b> 000 NAME STREET OTTAWA Ontario A1A 1A1 Effective on YYYY-MM-DD
--	---

Change of Canada Pension Plan (CPP) Address

<b>From:</b> 111 NAME STREET OTTAWA Ontario K1K 1K1	<b>To:</b> 000 NAME STREET OTTAWA Ontario A1A 1A1 Effective on YYYY-MM-DD
--	---

Now that you have completed your transaction, we encourage you to [view your changes](#).

Please ensure that you also make any necessary changes to your telephone number or [payment destination](#), if applicable.

[Return to My Service Canada Account home page](#)

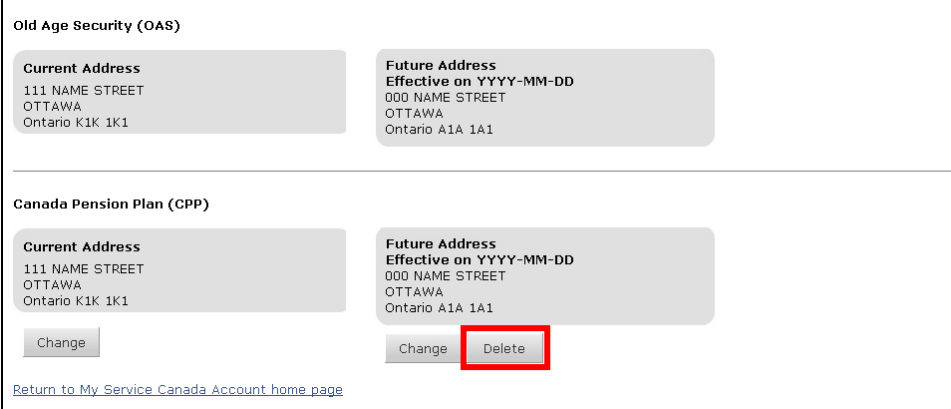
## Change of Address – Transaction Confirmation

Once the change request is confirmed, the following Transaction Confirmation screen will appear. The client should:

- verify that the information on the screen is correct;
- print the confirmation screen and keep it for their records;
- make applicable changes to the telephone number or payment destination.

## Delete Future Address

The future address for a client can be deleted by selecting the Delete button from the bottom of the Address screen displayed below.



The screenshot shows two sections: 'Old Age Security (OAS)' and 'Canada Pension Plan (CPP)'. Each section has a 'Current Address' and a 'Future Address' field. The 'Future Address' field includes an 'Effective on YYYY-MM-DD' date. Below the 'Future Address' field in the CPP section, there are two buttons: 'Change' and 'Delete'. The 'Delete' button is highlighted with a red box. At the bottom of the screenshot, there is a link: [Return to My Service Canada Account home page](#).

Next, a delete address confirmation screen will appear. The client can select either the Confirm or the Cancel button. Confirm will delete the future address. A confirmation page will then be displayed to confirm the deletion. The client can print this for their records.



**Take Note:** The same procedure described above is used to delete a future payment destination.



# Payment Destination

## View/Change my Payment Destination

The Payment Destination screen displays the current and future (if applicable) client payment destination. The delivery method for CPP and OAS benefits can be changed from this screen.



**Take Note:** Changes made in the Payment Destination screen will not modify the address. To view or change an address, the client must select the View/Change my address link located on the My Service Canada Account home page.

Featured Services Accessibility Help
Home > -----
Don't forget to [Log out](#) before leaving the site

MARY BROWN

To view or change your address, choose **View/Change My Address** from the My Service Canada Account home page.

**Note:** Changes to your payment destination must be made at least one month in advance. When choosing a future effective date, you must ensure the date you are choosing is one month greater than the month you are currently in.

For example, if you want your January payment to be sent to a new destination, you must have an effective date of no later than December 31.

If you provide the information close to, or past the first day of the month, you might have missed the cut-off date. We suggest that you [contact us](#) to verify that your change will take effect on the desired date before making any changes.

The *Canada Pension Plan* and *Old Age Security Act* require that you report:

- a change in your marital status;
- the death of a benefit recipient;
- a change of custody of your child or children under the age of 18;
- your departure from Canada for more than one month;
- your return to Canada;
- your moving from one country to another

If any of the above situations apply to you, and you have not yet notified Service Canada, you must [contact](#) the Department for assistance. From outside North America, you must [contact](#) the Department in writing or through your embassy. **Failure to do so could result in an overpayment or non-receipt** of benefits to which you may have been entitled.

---

**Old Age Security (OAS)**

<div style="border: 1px solid #ccc; padding: 5px; background-color: #f9f9f9;"> <p><b>Current Payment Destination</b> Branch Number: 30582 Institution Number: 0001 Account Number: 8510231</p> <p style="text-align: center;"><a href="#">Change</a></p> </div>	<div style="border: 1px solid #ccc; padding: 5px; background-color: #f9f9f9;"> <p><b>Future Payment Destination Effective on YYYY-MM-DD</b> Branch Number: 30582 Institution Number: 0001 Account Number: 8510232</p> <p style="text-align: center;"><a href="#">Change</a> <a href="#">Delete</a></p> </div>
---	---

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**Canada Pension Plan (CPP)**

<div style="border: 1px solid #ccc; padding: 5px; background-color: #f9f9f9;"> <p><b>Current Payment Destination</b> Branch Number: 30582 Institution Number: 0001 Account Number: 8510231</p> <p style="text-align: center;"><a href="#">Change</a></p> </div>	<div style="border: 1px solid #ccc; padding: 5px; background-color: #f9f9f9;"> <p><b>Future Payment Destination Effective on YYYY-MM-DD</b> Branch Number: 30582 Institution Number: 0001 Account Number: 8510232</p> <p style="text-align: center;"><a href="#">Change</a> <a href="#">Delete</a></p> </div>
---	---

[Return to My Service Canada Account home page](#)

To change the payment destination select the appropriate Change button.



**Take Note:** Different payment destinations and delivery methods may be used for each program.

## Selecting Delivery Method

The client has the choice of having their payment delivered to them via cheque or direct deposit.

**Change Payment Destination**

---

Answers to fields and questions with an asterisk (\*) are mandatory

**Select payment delivery method**

\* How do you wish to receive your payment? Choose **one** of the following options:

By direct deposit ▾

[Return to My Service Canada Account home page](#)

To change a payment destination:

- select the delivery method; and
- select the Continue button.

VUPI will display the Change Payment Destination screen for the selected method of delivery.

## Direct Deposit

Changing a payment destination is completed using the two step process described below:

- Step one: enter your new payment destination;
- Step two: confirm your change of payment destination.

In this instance, the method of payment selected is direct deposit. The payment destination for both programs can be changed by selecting the box located above the bank information.

To change the direct deposit destination, complete the following fields:

- Branch Number;
- Institution Number;
- Account Number;
- enter the date the change is to take place, if applicable; and
- select the Continue button.



**Take Note:** A client who wishes to change their method of payment in order to receive a cheque will be directed to the Change Payment Destination screens. The same process applies as described above.

## Account Number Accuracy

As per current business practices, domestic payments can be directly deposited to any Canadian bank. At times the following screen will be displayed to indicate that the account number format cannot be verified. Foreign payments are handled through our Foreign Service provider, the Bank of America.

Don't forget to  
**Log out**  
before leaving the site

MARY BROWN

**Please note:** The accuracy of this account number cannot be verified. If you are unsure of the correct banking information for your direct deposit, we strongly recommend that you contact your financial institution. Mistakes or inconsistencies could result in delays; therefore, we encourage you to review your new information carefully. However, if you are certain that the information is correct, it will be used.

**Requested change:**

Branch Number: 30582  
Institution Number: 0001  
Account Number: 8510232  
**Effective on YYYY-MM-DD**

Re-enter your direct deposit information

[Return to My Service Canada Account home page](#)

The client will have three choices. They can:

- Select the Continue button to acknowledge that they know the account format cannot be verified but that they wish to use it anyway. (The client must confirm the change and a record of the transaction will be created);
- Select the Re-enter your direct deposit information link to return to the Change Payment Destination screen to enter different direct deposit information; or
- Select the Cancel button to return to the Payment Destination screen.



**Take Note:** Mistakes or inconsistencies could result in delays; therefore, we strongly recommend that the client contact their financial institution if they are unsure of the correct banking information.

## Confirm Change to Payment Destination

Before the change is made, the old and new payment destination information is displayed and must be verified by the client.

Featured Services	Accessibility	Help
Home > -----		
<b>Change Payment Destination</b>		Don't forget to <input type="button" value="Log out"/> before leaving the site
<b>MARY BROWN</b>		
<b>Step 2 of 2 - Confirm</b>		
Please confirm that you wish to use the information displayed below. A record of your confirmation will be created.		
<b>Please Note:</b> The accuracy of this account number cannot be verified. If you are unsure of the correct banking information for your direct deposit, we strongly recommend that you contact your financial institution. Mistakes or inconsistencies could result in delays; therefore, we encourage you to review your new information carefully. However, if you are certain that the information is correct, it will be used.		
<b>Change of CPP Payment Destination</b>		
<b>From:</b> Branch Number: 30582 Institution Number: 0001 Account Number: 8510232	<b>To:</b> Branch Number: 30582 Institution Number: 0001 Account Number: 8510232 <b>Effective on YYYY-MM-DD</b>	
<b>Change of CPP Payment Destination</b>		
<b>From:</b> Branch Number: 30582 Institution Number: 0001 Account Number: 8510232	<b>To:</b> Branch Number: 30582 Institution Number: 0001 Account Number: 8510232 <b>Effective on YYYY-MM-DD</b>	
<input type="button" value="Confirm"/> <input type="button" value="Cancel"/>		
<a href="#">Return to My Service Canada Account home page</a>		

To complete the transaction and create a record of the change •select the Confirm button.

## Transaction Confirmation

Once the client has confirmed the change request, the Transaction Confirmation screen will appear as was shown above.

The client is reminded to:

- print the Confirmation screen and keep it for their records;
- select the view your changes link to display the Payment Destination
- screen with the changes; and
- make applicable changes to the telephone number or address.

# Telephone Number

## View/Change my Telephone Number

The client may view, change, add or delete a telephone number using the View/Change my telephone number link located on the My Service Canada Account home page. A telephone number is not mandatory; therefore, the client may also delete their telephone number.

**Telephone Number**

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**Current Telephone Number**  
(000) 000-0000  
Change Delete

**Future Telephone Number**  
(000) 000-0000  
Effective on YYYY-MM-DD  
Change Delete

**Current Telephone Number**  
There is no current telephone number on your file.  
Add Number

[Return to My Service Canada Account home page](#)

To change a telephone number simply select the Change button under the appropriate telephone number.

## Change Telephone Number

The ten digit telephone number should be entered in the field provided on the Change Telephone Number screen displayed below. VUPI will automatically format the telephone number entered.

To change a telephone number:

- Step 1 enter the new telephone number and enter the date the change is to take effect (if applicable); and
- Step 2 - select the Continue button.



**Take Note:** Future telephone number changes may be submitted up to 180 days in advance.

## Confirm Change of Telephone Number

This screen will display the original telephone number in the From block and the new telephone number in the To block. The client should review the new information and select the Confirm button to accept the change.

## Transaction Confirmation

Next, the Transaction Confirmation screen appears. The client should print this screen for their records.

## Delete Telephone Number

It is not necessary for a client to have a telephone number on file. In order to delete a telephone number simply select the Delete button located under the number you would like to remove.

Telephone Number	
<hr/>	
<b>Current Telephone Number</b> (000) 000-0000	<b>Future Telephone Number</b> (000) 000-0000 Effective on YYYY-MM-DD
<input type="button" value="Change"/> <input type="button" value="Delete"/>	<input type="button" value="Change"/> <input type="button" value="Delete"/>
<b>Current Telephone Number</b> There is no current telephone number on your file.	
<input type="button" value="Add Number"/>	
<a href="#">Return to My Service Canada Account home page</a>	

## Confirm Deletion of Telephone Number

The deletion is confirmed by selecting the Confirm button located on the screen.

## Transaction Confirmation

Next, the Transaction Confirmation screen appears. The client should retain this confirmation in their records.



# OAS Opt-out

## Delay receiving my OAS pension

If a client has received a Notification Letter (ISP-3009) and they do not wish to receive their Old Age Security (OAS) pension at this time, they may choose to delay receipt of their OAS pension. Once they have opted-out online, they will need to apply when they want to begin receiving their pension.

The screenshot shows a web form titled "OAS Pension" with a navigation bar at the top containing "Featured Services", "Accessibility", and "Help". A breadcrumb trail shows "Home > -----". On the right side, there is a "Log out" button and a reminder: "Don't forget to before leaving the site". Below the header, a note states: "Answers to fields and questions with an asterisk (\*) are mandatory". The user's name, "MARY BROWN", is displayed in the top right. The main content area is titled "Important Information:" and contains several paragraphs of text explaining the process of delaying the OAS pension, including a link to "www.servicecanada.gc.ca". A disclaimer states: "\*  By checking this box and clicking 'SUBMIT', you declare that you do not wish to receive the OAS pension at this time. You understand that should you wish to receive this pension in the future, you will need to apply and that any entitlement (including up to 11 months retroactive benefits if applicable) will be based on your information at that time." At the bottom of the form, there are "Submit" and "Cancel" buttons separated by the word "or".

If the client does not want to receive their Old Age Security pension at this time they may delay it by clicking the check box and selecting Submit.

## Confirm Delay of OAS Pension

The action is confirmed by selecting the Confirm button located on the screen below

### Confirm

---

Are you sure you want to delay receiving your OAS pension?

or

[Return to My Service Canada Account home page](#)

## Transaction Record

Next, the Transaction Record screen appears. As always, the client should retain this transaction in their records.

### Transaction Record

before leaving the site

**MARY BROWN**

**Thank you! Your request has been submitted.**

You have now delayed receipt of your OAS Pension. Should you wish to receive your pension in the future, you will need to apply. Any entitlement (including up to 11 months retroactive benefits if applicable) will be based on your information at that time.

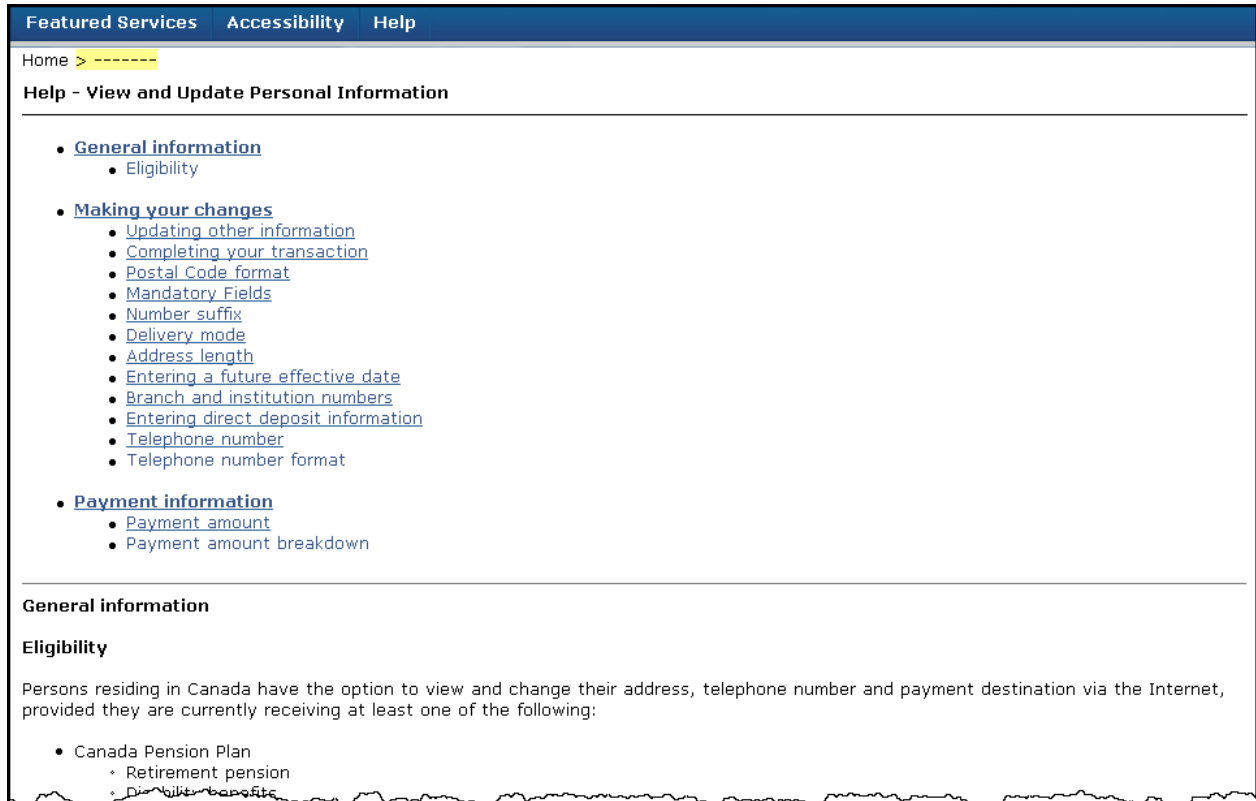
**Transaction Date:** DD MM YYYY, HH:MM:SS EDT

Your online benefit status may take 4 to 6 weeks to be updated. **Please print this page for your records.**

[Return to My Service Canada Account home page](#)

# Online Help

Selecting the Help link located at the top of each screen within the VUPI application will open the following window. Simply scroll down to the required topic and select the link to display the desired information.



The screenshot shows a web interface with a dark blue header containing the links "Featured Services", "Accessibility", and "Help". Below the header, a breadcrumb trail reads "Home > -----". The main heading is "Help - View and Update Personal Information". The content is organized into three main sections, each with a blue bullet point and a bolded title:

- General information**
  - Eligibility
- Making your changes**
  - Updating other information
  - Completing your transaction
  - Postal Code format
  - Mandatory Fields
  - Number suffix
  - Delivery mode
  - Address length
  - Entering a future effective date
  - Branch and institution numbers
  - Entering direct deposit information
  - Telephone number
  - Telephone number format
- Payment information**
  - Payment amount
  - Payment amount breakdown

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**General information**

**Eligibility**

Persons residing in Canada have the option to view and change their address, telephone number and payment destination via the Internet, provided they are currently receiving at least one of the following:

- Canada Pension Plan
  - Retirement pension
  - Disability benefits

# Logout

The client should **always** logout of the application using the Logout link located on the top navigation bar. This option is available from each screen within the application.



***Take Note:*** It is important for the client 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 1

## MSCA Call Centre Roles and Responsibilities

Call Centre	Roles and Responsibilities
<p>GC Key Client Service Centre (CSC)</p> <p><b>Toll-free: 1-855-438-1102 (Canada &amp; US)</b></p> <p><b>Toll-free TTY: 1-855-438-1103</b></p> <p><b>Outside Canada and US</b> <b>1-800-2318-6290</b> <i>*Dial the international dialing code followed by the number</i></p> <p><b>Hours of service: 24 hours / 7 days</b></p>	<p><b>To assist users with any items related to GCKey credential (e.g. GCKey login, GCKey registration, GCKey service browser requirements, etc.).</b></p> <p><b>To refer users to the SecureKey Concierge User Help Desk for difficulties with Secure Key Concierge and Sign-in Partner credentials.</b></p> <p><b>To refer users to R&amp;A Help Desk for assistance with the online registration and authentication process only. This phone number appears as required in R&amp;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&amp;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.</b></p> <p><b>To refer users to the Employment Insurance (EI) Call Centers if they require program related assistance or need to obtain an EI access code.</b></p> <p><b>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).</b></p> <p><b>To refer users back to My Service Canada Account once they are able to login with GCKey.</b></p>
<p>SecureKey Concierge User Help Desk (UHD)</p> <p><b>Toll-free: 1-855-433-5397</b></p>	<p><b>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.</b></p> <p><b>To refer banking clients to their banking institutions as required.</b></p> <p><b>To refer users to R&amp;A Help Desk for assistance with the online</b></p>

<p><b>Toll-free TTY: 1-855-224-1714</b></p> <p>Outside Canada and the United States</p> <p><b>Toll-free: 1-800-7328-7358</b></p> <p><i>*Dial the international dialing code followed by the number</i></p> <p><b>Hours of service: 24 hours / 7 days</b></p>	<p>registration and authentication <b>process</b> only. <b>This phone number appears as required in R&amp;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&amp;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.</b></p> <p><b>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.).</b></p> <p><b>To refer users to the Employment Insurance (EI) Call Centers if they require program related assistance or need to obtain an EI access code.</b></p> <p><b>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).</b></p>
<p>Registration and Authentication (R&amp;A) Help Desk</p> <p><b>Toll-free: 1-866-279-5238</b></p> <p>Outside Canada and the United States: <b>1-506-548-7009</b></p> <p>Hours of service: <b>Monday to Friday, 8:30 a.m. to 4:30 p.m. (caller's local time)</b></p>	<p><b>To assist users through the online registration and authentication process only. This phone number appears as required in R&amp;A online error messages when a user is unsuccessful during the Service Canada registration process (e.g. first login).</b></p> <p><b>On the first login, an attempt can be unsuccessful for the following reasons:</b></p> <ul style="list-style-type: none"> <li>- a Social Insurance Register (SIR) record mismatch,</li> <li>- a user has tried 5 unsuccessful attempts to gain access and their SIN is now locked for 24 hours,</li> <li>- the wrong EI access code or PAC (for EI or CPP/OAS) was entered.</li> </ul> <p><b>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.</b></p> <p><b>To refer users to the Employment Insurance (EI) Call Centers if they require program related assistance or need to obtain an EI access code.</b></p> <p><b>To refer users to the Canada Pension Plan and Old Age Security (CPP/OAS) Call Centers if they require program related</b></p>

**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**

<p>Employment Insurance (EI) Call Centres</p> <p><b>Toll-free : 1 800 206-7218</b></p> <p><b>Toll-free TTY: 1 800 529-3742</b></p> <p>Hours of service: <b>Monday to Friday, 8:30 a.m. to 4:30 p.m. (caller's local time)</b></p>	<p><b>National Service Desk as outlined in the Common Reference Tool.</b></p> <p><b>To assist clients with program specific questions regarding Employment Insurance programs, online service options and to obtain an Access Code.</b></p> <p><b>To assist clients with general online support issues such as navigation and troubleshooting of MSCA and MEIIO Online services.</b></p> <p><b>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).</b></p> <p><b>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.).</b></p> <p><b>To refer users to the SecureKey Concierge User Help Desk for difficulties with Secure Key Concierge and Sign-in Partner credentials.</b></p> <p><b>To refer users to R&amp;A Help Desk for assistance with the online registration and authentication process only. This phone number appears as required in R&amp;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&amp;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.</b></p> <p><b>To report Service Canada systems technical issues to the IT National Service Desk as outlined in the Common Reference Tool and SDA Assist.</b></p>
<p>Canada Pension Plan and Old Age Security (CPP/OAS) Call Centres</p> <p><b>Toll-free (English service): 1-800-277-9914</b></p> <p><b>Toll-free (French</b></p>	<p><b>To assist clients with program specific questions regarding Canada Pension Plan and Old Age Security programs</b></p> <p><b>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).</b></p> <p><b>To request a Personal Access Code (PAC) on the client's behalf.</b></p>



<p><b>service): 1-800-277-9915</b></p> <p><b>From outside Canada and the United States:</b></p> <p><b>1-613-957-1954 (collect calls accepted)</b></p> <p><b>Toll-free TTY: 1-800-255-4786</b></p> <p>Hours of service: <b>Monday to Friday, 8:30 a.m. to 4:30 p.m. (caller's local time)</b></p>	<p><b>To refer users to the Employment Insurance (EI) Call Centers if they require program related assistance or need to obtain an EI access code.</b></p> <p><b>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.).</b></p> <p><b>To refer users to the SecureKey Concierge User Help Desk for difficulties with Secure Key Concierge and Sign-in Partner credentials.</b></p> <p><b>To refer users to R&amp;A Help Desk for assistance with the online registration and authentication process only. This phone number appears as required in R&amp;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&amp;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</b></p> <p><b>To report Service Canada systems technical issues to the IT National Service Desk as outlined in the Common Reference Tool and SDA Assist.</b></p>
<p>1 800 O-Canada</p> <p><b>Toll-free: 1-800-622-6232</b></p> <p><b>Toll-free TTY: 1-800-926-9105</b></p> <p><b>Outside Canada and the United States:</b> <b>List of Toll free numbers available:</b> <a href="http://www.servicecanada.gc.ca/eng/common/contactus/phone.shtml">http://www.servicecanada.gc.ca/eng/common/contactus/phone.shtml</a></p> <p><b>Hours of service:</b></p>	<p><b>To assist callers with general enquiries regarding Government of Canada programs and services.</b></p> <p><b>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.).</b></p> <p><b>To refer users to the SecureKey Concierge User Help Desk for difficulties with Secure Key Concierge and Sign-in Partner credentials.</b></p> <p><b>To refer users to R&amp;A Help Desk for assistance with the online registration and authentication process only. This phone number appears as required in R&amp;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&amp;A pages – e.g. after the</b></p>

<p><b>Monday to Friday, 8 a.m. to 8 p.m. (caller's local time)</b></p>	<p><b>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</b></p> <p><b>To refer users to the Employment Insurance (EI) Call Centers if they require program related assistance or need to obtain an EI access code.</b></p> <p><b>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).</b></p> <p><b>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.</b></p>
<p>Social Insurance Number Registration Liaison and Enquiries Help Desk</p> <p><b>Toll-free: 1-800-206-7218, Option 3</b></p> <p><b>Outside Canada: 1-506-548-7961</b></p> <p><b>Hours of service: Monday to Friday, 8:30 a.m. to 4:30 p.m. (caller's local time)</b></p>	<p><b>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).</b></p> <p><b>To refer users to the Employment Insurance (EI) Call Centers if they require program related assistance or need to obtain an EI access code.</b></p> <p><b>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)</b></p>
<p>National Service Desk (NSD)</p> <p><b>Toll-free: 1-800-268-0408</b></p>	<p><b><i>For Service Canada Employees only. This number must not be given out to callers. NSD will not return calls to citizens.</i></b></p> <p><b>To receive requests from internal clients/agents</b></p> <p><b>To refer Service Canada system or application problems reports to IITB for resolution.</b></p>