

## Intranet IRES (CSA) Screen Flow

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## Scenario 1: SSA Representative successfully proofs Appointed Rep (who only has one User ID) and Rep is on the “green list”.

- SSA Representative logs on to CSA.
- The System displays “CSA Home.”

### CSA Home

The screenshot shows the 'CSA Home' interface. At the top, there is a red header with the text 'Integrated Registration Services Customer Support Application'. Below this is a dark blue navigation bar with the text 'IRES/CSA' and a 'Help: CS001' link. On the left side, there is a grey sidebar with a 'CSA Home' menu item and three sub-items: 'Block', 'Unblock', and 'Employer Address Search'. The main content area is titled 'CSA Home' and contains the following sections:

- Search for Employer:** A text input field labeled 'EIN:' followed by an 'Employer Search' button.
- Search for User:** Three text input fields labeled 'SSN:', 'or User ID:', and 'or Rep ID:' with corresponding search buttons: 'SSN Search', 'User ID Search', and 'Rep ID Search'.
- Add Foreign User:** A text input field with the label 'User lives and works outside U.S. and does not have an SSN' and an 'Add' button.

The SSA Representative:

- Enters Rep SSN .
- Selects SSN Search.

The System performs the search.

- If the search is not successful (SSN is not found or the user does not have an Appointed Rep ID), a blank “New User Information” screen is displayed. New user information should NOT be entered, since the information from the processed 1699 should have been displayed. The SSA Representative follows manual procedures to resolve.
- If the search is successful, the “User Information for [First Name] [Last Name]” is displayed. The information on this screen is from the 1699 (the address is the home address).

## User Information for [First Name] [Last Name]

Integrated Registration Services
Customer Support Application

Name: JOHN PUBLIC
SSN: 999011234
User ID: 9K8278TG
DOB: 01/01/1979
 EIN: 020000000

[CSA Home](#)
IRESCSA
[Help](#) CS003

- User Information
- Service Status
- Select Suite
- Add/Update Employer Information
- Report of Contact
- User History
- Block
- Unblock
- Exclusive Special Services
- Record ID Information

### User Information for JOHN PUBLIC

User ID Status: ACTIVE  
 User ID Issue Date: 04/02/2009  
 Password Issue Date: 04/02/2009  
 Password Expiration Date: 07/01/2009

Confirm / update information below with user :

\* Indicates mandatory field.

\* First Name:

Middle Name:

\* Last Name:

Suffix:

\* Date of Birth:

\* Address Line 1:

Address Line 2:

\* City:

\* State Abbreviation (for US)/Province:

\* Zip/Postal Code:  Zip Extension:

\* Country:

\* Phone:  Ext:

Fax:

\* Email:

## The SSA Representative:

- Updates Name and DOB with information from the Gov't ID, if different than what is displayed.
- The address SHOULD NOT be updated.
- Select "Update " button.

## The System performs the Numident Check on the updated information.

- If the Numident check fails, a message "Numi Failed" is displayed. If there was a typing error, the SSA Representative should update the information and select "Update" again (no limit on attempts to check Numident).

If the Numident check is successful, the SSA Representative selects the "Record ID Information" link on the left side of the screen. The "Record ID Information" screen is displayed.

## Record ID Information

The screenshot shows the 'Record ID Information' form in the 'Customer Support Application'. The header includes the 'Integrated Registration Services' logo and the title 'Customer Support Application'. Below the header, user information is displayed: Name: JOHN PUBLIC, SSN: 999011234, User ID: 9K8278TG, DOB: 01/01/1979, EIN: 020000000. A 'Help CS092' link is in the top right. The left sidebar contains navigation links: 'CSA Home', 'User Information', and 'Record ID Information' (which is highlighted). The main content area is titled 'Record ID Information' and contains the following fields: a note '\* indicates mandatory field.', a dropdown menu for 'Type of ID' with 'Drivers License' selected, a text input field for 'Complete ID #', and a dropdown menu for 'State' with 'WA' selected. A 'Continue' button is located at the bottom of the form.

The screenshot shows the 'Record ID Information' form in the 'Customer Support Application'. The header includes the 'Integrated Registration Services' logo and the title 'Customer Support Application'. Below the header, user information is displayed: Name: JOHN PUBLIC, SSN: 999011234, User ID: 9K8278TG, DOB: 01/01/1979, EIN: 020000000. A 'Help CS092' link is in the top right. The left sidebar contains navigation links: 'CSA Home', 'User Information', and 'Record ID Information' (which is highlighted). The main content area is titled 'Record ID Information' and contains the following fields: a note '\* indicates mandatory field.', a dropdown menu for 'Type of ID' with 'US Passport' selected, a text input field for 'Complete ID #', and a 'Continue' button is located at the bottom of the form.

The SSA Representative:

- Records type of ID and the ID #. If the ID type is one issued by a state, the state must be selected; if not state-issued, the state selection is not shown.
- Selects the "Continue button."

The System:

- Adds the AR Pilot (ARP) role, the Level 2 (LV2) role, and the Electronic Folder (EFR) pending role (generates activation code). If one or more of these roles already exists, it will not add a second one.
- Displays the “Print Activation Code for eFolder” screen.

## Print Activation Code for eFolder

The screenshot displays the 'Integrated Registration Services Customer Support Application' interface. At the top, a red header bar contains the application title. Below it, a dark blue navigation bar shows user information: Name: JOHN PUBLIC, SSN: 999011234, User ID: 9K8278TG, Rep ID: R2SW44T3RG, DOB: 01/01/1979, and EIN: 020000000. A 'Help CS093' link is visible in the top right. The left sidebar contains navigation links: 'CSA Home', 'User Information', and 'Print Activation Code for eFolder' (which is highlighted with a red arrow). The main content area, titled 'IRESCSA', displays a yellow success message: 'Access Claimant's Electronic Folder role has been added successfully. Select the **Print Activation Code** button to print the Access Claimant's Electronic Folder activation code.' A 'Print Activation Code' button is centered below the message.

- The SSA Representative selects the “Print Activation Code” button.
- The System displays a preview of the screen and a print window.

## Activation Code Print-Out

The screenshot displays the IRES CSA Customer Support Application interface. The top navigation bar includes the SSA logo and the text "Integrated Registration Services Customer Support Application". Below this, user information is listed: Name: JOHN PUBLIC, SSN: 999011234, User ID: 9K8278TG, DOB: 01/01/1979, and EIN: 020000000. The main content area shows a sidebar with "Print Activation Code for eFolder" selected. The central pane displays the "Print Activation Code for eFolder" page, which features a red header with the SSA logo and the text "Access Claimant's Electronic Folder Activation Code". Below the header, it states "Access Claimant's Electronic Folder Activation Code is:" followed by the code "Activation Code: AB65DRS9". A note below the code reads: "You can use the above Activation code to activate Access Claimant's Electronic Folder service." A Windows Print dialog box is overlaid on the bottom right, showing a list of printers, including "3S11-LexC772 on s27adf3" and "3S11-OPTRAT634 on S27ADF3". The dialog is configured to print 1 collated page.

The SSA Representative prints the activation code and gives it to the Appointed Rep.

## Scenario 2: Appointed Rep calls OCO for eFolder Activation Code

### CSA Home

Integrated Registration Services **Customer Support Application**

CSA Home

Block  
Unblock  
Employer Address Search

IRESCSA [Help CS001](#)

**CSA Home**

Enter any one of the items below to search for an employer or user.

**Search for Employer**

EIN:

---

**Search for User**

SSN:

or User ID:

or Rep ID:

---

**Add Foreign User**

User lives and works outside U.S. and does not have an SSN

OCO:

- Confirms identity (following existing procedures).
- Enters Rep ID or SSN.
- Selects Search.

The System performs the search.

- If the search is not successful (SSN is not found or the user does not have an Appointed Rep ID), a blank "New User Information" screen is displayed. New user information should NOT be entered, since the information from the processed 1699 should have been displayed. The SSA Representative follows manual procedures to resolve.
- If the search is successful, the "User Information for [First Name] [Last Name]" is displayed. The information on this screen is from the 1699 (the address is the home address).



## User Information for [First Name] [Last Name]

Integrated Registration Services
Customer Support Application

Name: JOHN PUBLIC
SSN: 999011234
User ID: 9K8278TG
DOB: 04/04/1979
EIN: 020000000

[CSA Home](#)

**▶ User Information**

[Service Status](#)

[Select Suite](#)

[Add/Update Employer Information](#)

[Report of Contact](#)

[User History](#)

[Block](#)

[Unblock](#)

[Exclusive Special Services](#)

[View Activation Code for eFolder](#)

IRESCSA [Help](#) CS003

### User Information for JOHN PUBLIC

User ID Status: ACTIVE  
 User ID Issue Date: 04/02/2009  
 Password Issue Date: 04/02/2009  
 Password Expiration Date: 07/01/2009

Confirm / update information below with user :

\* indicates mandatory field.

\* First Name:

Middle Name:

\* Last Name:

Suffix:

\* Date of Birth:

\* Address Line 1:

Address Line 2:

\* City:

\* State Abbreviation (for US)/Province:

\* Zip/Postal Code:  Zip Extension:

\* Country:

\* Phone:  Ext:

Fax:

\* Email:

- OCO selects the “View Activation Code for eFolder” link on the left side of the screen.
- The System displays the “View Activation Code for eFolder” screen.

## View Activation Code for eFolder

The screenshot shows a web application interface. At the top, there is a red header with the text "Integrated Registration Services" and "Customer Support Application". Below this, a dark blue bar contains user information: "Name: JOHN PUBLIC", "SSN: 999011234", "User ID: 9K8278TG", "DOB: 01/01/1979", and "EIN: 020000000". On the left side, there is a navigation menu with options: "CSA Home", "User Information", and "View Activation Code for eFolder" (which is highlighted with a red arrow). The main content area is titled "View Activation Code for eFolder" and contains a yellow box with the following text: "The Electronic Folder Activation Code is **AB65DRS9**. Select the **Print Activation Code** button to print the activation code." Below the text is a button labeled "Print Activation Code".

- OCO recites the activation code to the Appointed Rep.
- OCO may print the activation code by selecting the "Print Activation Code" button.