

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' page of the 'Integrated Registration Services Customer Support Application'. The page has a red header bar with the application name. On the left is a sidebar with links: 'CSA Home', 'Block', 'Unblock', and 'Employer Address Search'. The main content area is titled 'CSA Home' and includes a 'Help CS001' link. Below the title, it says 'Enter any one of the items below to search for an employer or user.' There are three search sections: 'Search for Employer' with an 'EIN' input field and an 'Employer Search' button; 'Search for User' with 'SSN', 'or User ID', and 'or Rep ID' input fields, each with a corresponding search button ('SSN Search', 'User ID Search', 'Rep ID Search'); and 'Add Foreign User' with a description '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](#)
[User Information](#)
[Service Status](#)
[Select Suite](#)
[Add/Update Employer Information](#)
[Report of Contact](#)
[User History](#)
[Block](#)
[Unblock](#)
[Exclusive Special Services](#)
[Record ID Information](#)

IRESCSA

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

Integrated Registration Services		Customer Support Application	
		IRESCSA Record ID Information	
CSA Home User Information Record ID Information		Name: JOHN PUBLIC SSN: 999011234 User ID: 9K8278TG DOB: 01/01/1978 EIN: 020000000 Help CS092	
		<p>* indicates mandatory field.</p> <p>* Type of ID: <input type="text" value="Drivers License"/></p> <p>* Complete ID #: <input type="text"/></p> <p>* State: <input type="text" value="WA"/></p> <p><input type="button" value="Continue"/></p>	

Integrated Registration Services		Customer Support Application	
		IRESCSA Record ID Information	
CSA Home User Information Record ID Information		Name: JOHN PUBLIC SSN: 999011234 User ID: 9K8278TG DOB: 01/01/1978 EIN: 020000000 Help CS092	
		<p>* indicates mandatory field.</p> <p>* Type of ID: <input type="text" value="US Passport"/></p> <p>* Complete ID #: <input type="text"/></p> <p><input type="button" value="Continue"/></p>	


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

Integrated Registration Services		Customer Support Application				
	Name: JOHN PUBLIC	SSN: 999011234	User ID: 9K8278TG	Rep ID: R2SW44T3RG	DOB: 01/01/1979	EIN: 020000000
CSA Home	IRESCSA					Help CS093
User Information	Print Activation Code for eFolder					
Print Activation Code for eFolder	<div><p>Access Claimant's Electronic Folder role has been added successfully.</p><p>Select the Print Activation Code button to print the Access Claimant's Electronic Folder activation code.</p><p><input type="button" value="Print Activation Code"/></p></div>					

- 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 shows a web application interface for the Integrated Registration Services Customer Support Application. The header includes the SSA logo and user information: Name: JOHN PUBLIC, SSN: 999011234, User ID: 9K8278TG, DOB: 01/01/1979, EIN: 020000000. The main content area is titled 'Print Activation Code for eFolder' and displays the activation code 'AB65DRS9'. A 'Print' dialog box is open in the foreground, showing the 'General' tab with printer selection options and page range settings.

Integrated Registration Services Customer Support Application

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

Print Activation Code for eFolder

Access Claimant's Electronic Folder Activation Code

Access Claimant's Electronic Folder **Activation Code** is:

Activation Code: AB65DRS9

You can use the above Activation code to activate Access Claimant's Electronic Folder service.

Print Dialog Box:

- General tab selected
- Select Printer: 3S11-OPTRAT634 on S27ADF3
- Status: Ready
- Location: 3-S-11 Oper
- Comment: OSES - Eran Arnold
- Page Range: All
- Number of copies: 1
- Collate: ☒
- Buttons: Print, Cancel, Apply

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**

[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	
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	<p>IRESCSA Help CS003</p> <p>User Information for JOHN PUBLIC</p> <p>User ID Status: ACTIVE User ID Issue Date: 04/02/2009 Password Issue Date: 04/02/2009 Password Expiration Date: 07/01/2009</p> <p>Confirm / update information below with user :</p> <p>* indicates mandatory field.</p> <p>* First Name: <input type="text" value="JOHN"/></p> <p>Middle Name: <input type="text"/></p> <p>* Last Name: <input type="text" value="PUBLIC"/></p> <p>Suffix: <input type="text"/></p> <p>* Date of Birth: <input type="text" value="01011979"/></p> <p>* Address Line 1: <input type="text" value="TEST 1"/></p> <p>Address Line 2: <input type="text"/></p> <p>* City: <input type="text" value="WOODLAWN"/></p> <p>* State Abbreviation (for US)/Province: <input type="text" value="MD"/></p> <p>* Zip/Postal Code: <input type="text" value="21234"/> Zip Extension: <input type="text"/></p> <p>* Country: <input type="text" value="United States (default on registration)"/></p> <p>* Phone: <input type="text" value="1231231234"/> Ext: <input type="text"/></p> <p>Fax: <input type="text"/></p> <p>* Email: <input type="text" value="user@demoemployer.com"/></p> <p> <input type="button" value="Mail Temporary Password"/> <input type="button" value="Update"/> </p> <p> <input type="button" value="Add New/Pending User ID"/> </p>		

- 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

Integrated Registration Services		Customer Support Application			
Name: JOHN PUBLIC		SSN: 999011234	User ID: 9K3278TG	DOB: 01/01/1979	EIN: 020000000
CSA Home		IRESCSA			
User Information		View Activation Code for eFolder			
▶ View Activation Code for eFolder		<p>The Electronic Folder Activation Code is AB65DRS9</p> <p>Select the Print Activation Code button to print the activation code.</p> <p><input type="button" value="Print Activation Code"/></p>			

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