Operations, Maintenance, and Enhancements for OCSS Systems

System Framework

Portal User Page Flow
Version 4.1
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Administration for Children and Families
Office of Child Support Services
330 C Street SW, 5th Floor
Washington, DC 20201

Revision History

Date	Revision	Section	Author
3/14/2024	Updated instances of Office of Child Support Enforcement (OCSE) to Office of Child Support Services (OCSS), including web page images (figures). Template and editorial changes.	Version 4.1: Replaced figures	C. Stachlinski

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1   Registration

This document describes the processes to submit a request for user registration to access the Child Support Portal (CSP or Portal).
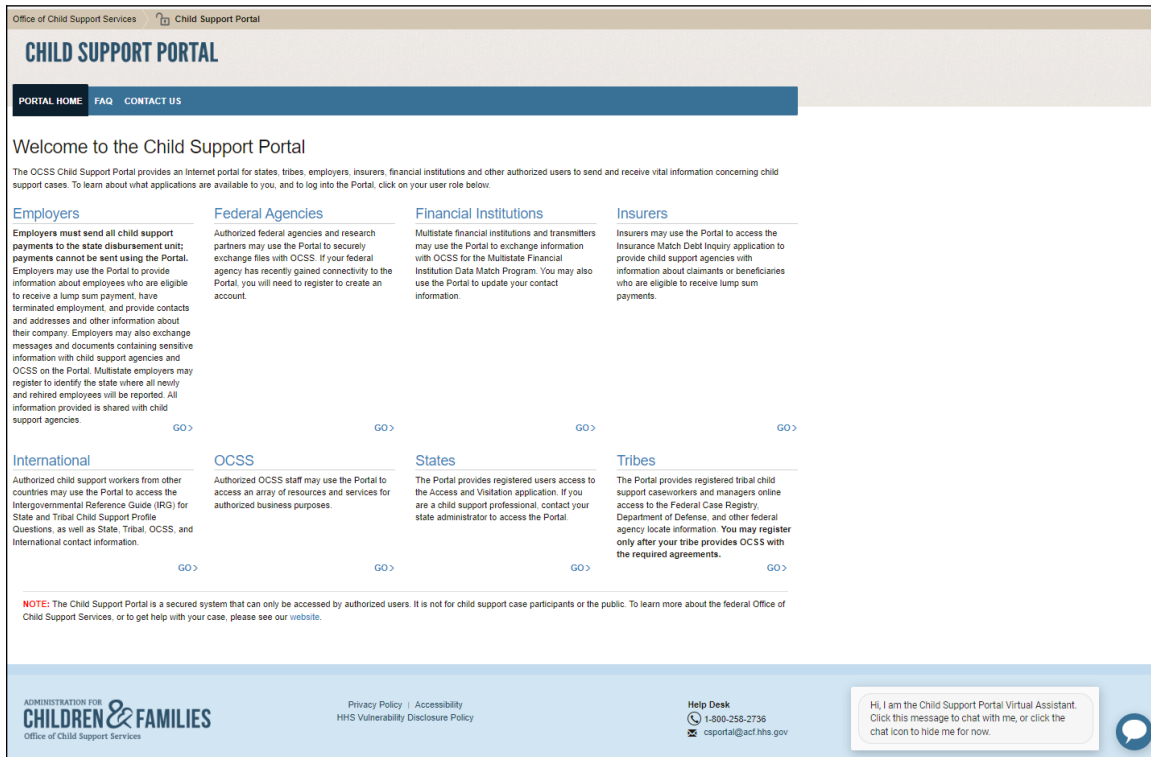
Figure 1-1: Welcome to the Child Support Portal

Notes:

- Figure 1-1 shows the header and footer for all CSP screens. The header may contain additional links (for example, Logout, Comments, FAQ, Contact Us, Print, Portal Home, and Chatbot); the footer may, too (for example, Office of Child Support Services, Privacy Policy, Accessibility, HHS Vulnerability Disclosure Policy, and the Help Desk email address).
- The footer also contains a small chat icon in the bottom right corner. This icon, which displays until the user accesses the Portal, offers help to the user to reset their password or unlock their account.
- To improve the readability of this document, the headers and footers on many web page images (figures) were excluded.

Chart 1-1 defines the functions available on the Welcome to the Child Support Portal page, including those in the header and footer.

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Chart 1-1: Welcome to Child Support Portal	
Link	Description
Portal Home	Indicates this is the home page for the Portal.
FAQ	Displays the Frequently Asked Questions (FAQ).
Contact Us	Displays the Help Desk Contact Page, which shows the phone number and email address for the Help Desk.
User Affiliations	Eight affiliations exist: **Employers**, **Federal Agencies**, **Financial Institutions**, **Insurers**, **International**, **OCSS**, **States**, and **Tribes**. The user selects the affiliation they want to register for. A list of functions for the selected affiliation displays.
Office of Child Support Services	Opens a web page with details about the Office of Child Support Services (OCSS).
Privacy Policy	Displays the Child Support Portal Privacy Policy.
Accessibility	Opens a web page with details on the Administration for Children and Families' commitment to making its websites accessible to the widest possible audience, including the disabled.
HHS Vulnerability Disclosure Policy	Opens a web page with details of the Health and Human Services Vulnerability Policy.
Help Desk	Shows the contact information for the Help Desk
GO	To select the user role the user is registering for, the user clicks **GO** in that user role's section; an applications list displays for the selected user role. All roles take the user to the This Portal Page Is For You If page. The registration form is not role-specific at this point.
Chatbot icon	An interactive system to help a user change their password or unlock their account without Help Desk staff assistance.

Users click one of the user affiliations or **GO** to navigate to the This Portal Page Is For You If page; for an example, see Figure 1 -2. On the left is a list of applications the user may be able to access, depending on the affiliation they select.

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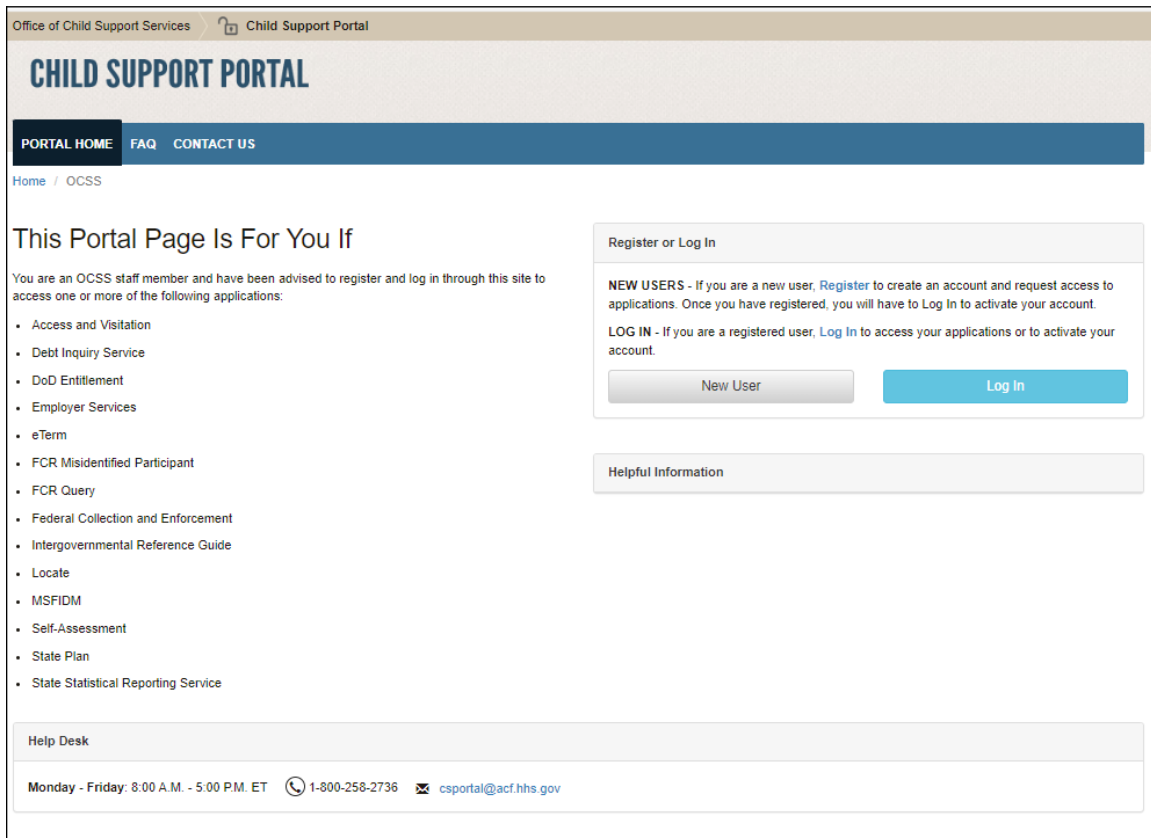
Figure 1-2: This Portal Page Is For You If

Chart 1-2 defines the functions available on the This Portal Page Is For You If page.

Chart 1-2: This Portal Page Is For You If Page	
Link	Description
This Portal Page Is For You If	Displays a list of functions available to the user role the user selected
New User	Opens the Child Support Portal User Registration page
Log In	Opens the Child Support Portal Log In page
Helpful Information	Displays links to documents or websites that may be helpful when using the Portal

In the **Register or Login** box, the user clicks **New User**. The Child Support Portal User Registration page opens; see Figure 1-3.

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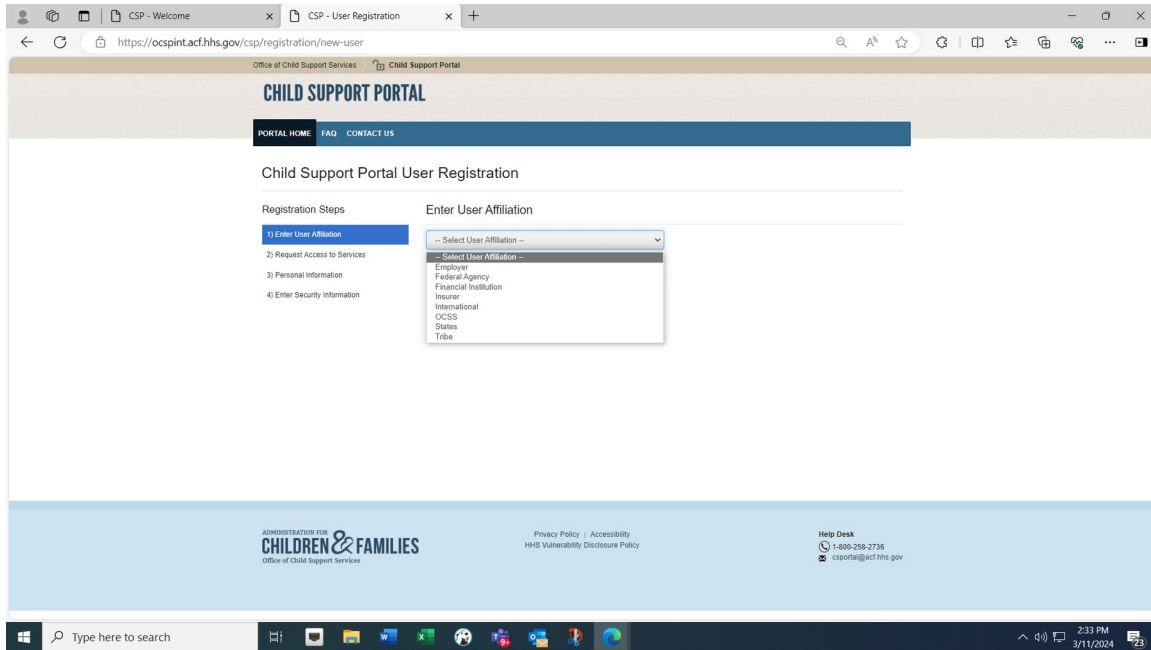
Figure 1-3: Child Support Portal User Registration, Step 1

To select an affiliation from the list of affiliations, the user clicks **Enter User Affiliation** to select the specific affiliation. For this example, the user clicked **OCSS**.

Depending on the affiliation selected, a new section with sub-groups may appear requesting more information. Continuing the above example, the **Enter OCSS Sub-Group Information** field displays; see Figure 1-4.
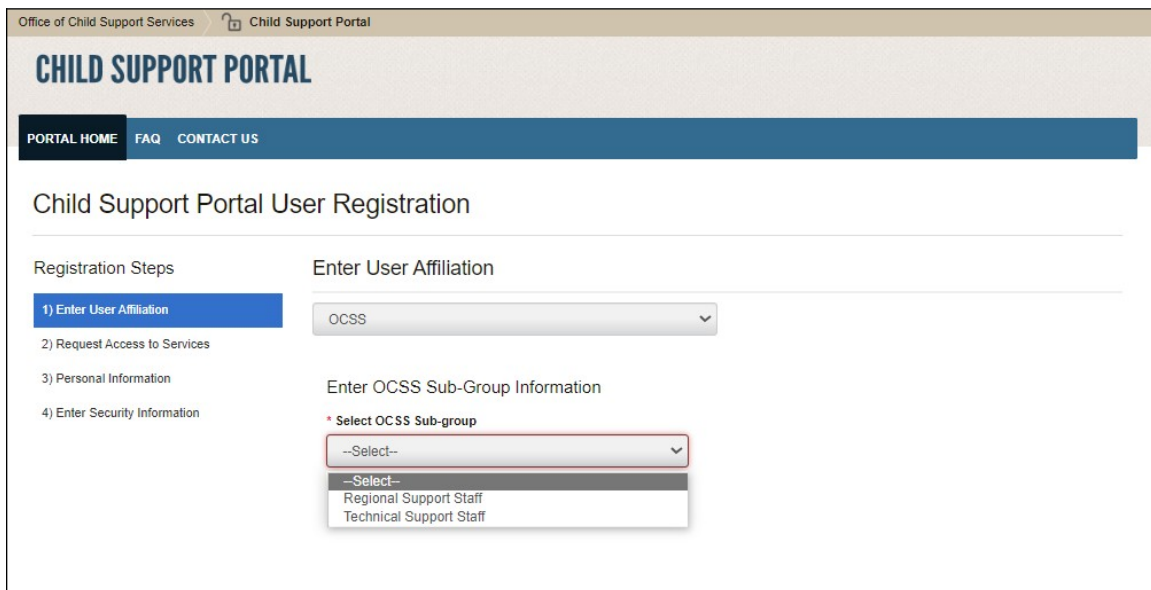
Figure 1-4: Child Support Portal User Registration, Step 2

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Chart   1 -3 defines the functions available on the Enter User Affiliation page.

Chart 1-3: Enter User Affiliation	
Link	Description
Enter User Affiliation	Opens a list of user affiliations.
Enter OCSS Sub-Group Information	In this OCSS user affiliation example above, clicks **Regional** or **Technical Support Staff**. Selections available for other affiliations vary from the example; see the next row.
Sub-Groups for Other Affiliations (Information requested for the other user types)	• **Employer**, **Insurer**, and **Financial Institution:** The user must enter the FEIN. • **Federal Agency:** The user must enter the agency name. • **Tribe:** The user must enter the tribe name. • **International:** The user must enter the country name. • **State:** The user must enter the state name.

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After the user makes selections in the affiliation list, the page expands to display a list of functions in the Request Access to Services section; Figure 1-5 shows an example of this page.

Figure 1-5: Child Support Portal User Registration, Step 3

The user clicks the functions they want to access. The next section the user completes is Enter Personal Information and Work Location; see Figure 1-6.

Required fields have red asterisks (*) before their labels.

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☐ Self-Assessment System is a software application used by the OCSS Division of Performance and Statistical Analysis (DPSA) staff to track OCSS Self-Assessment Reports and Regional Review Reports submitted annually by state and regional offices. (Self-Assessment)

☐ States may submit their State Plans and OCSS may review and approve State Plans. (State Plan)

☐ The State Profile Administration service allows authorized users to update a state's CSP profile and contacts. (State Profile Administration)

☐ Access state semi-annual reports and monthly New Hire and Multistate Employer Registry reports. (State Statistical Reports)

Enter Personal Information and Work Location

* First Name
[Enter your first name]

MI
[ ]

* Last Name
[Enter your last name]

* Address Line 1
[Enter number and street]

Address Line 2
[additional info]

Address Line 3
[additional info]

* City
[Enter City]

* State
[-Select- ⌄]

* Zip Code
[12345]

Zip Code Ext
[1234]

* Phone Number
[XXX-XXX-XXXX]

Phone Ext
[ ]

* Email Address
[username@company.com]

* My FEIN   Where do I find this?
[XXXXXXXXX]

* My Employer Name   Where do I find this?
[Enter Employer Name]

* Last 4 of SSN
[XXXX]

* Date of Birth
[MM/DD/YYYY 🗓]

* Access Code

For additional security, the system will ask you to provide an access code each time you log into the portal.

You can elect to receive the access code via voice or text message.

At the end of the registration process, the system will ask you to verify if the phone successfully received the call or text message.

◉ Voice   ○ Text

* Phone Number
[Enter Work Phone Number]

Phone Ext:
[ ]

Figure 1-6: Child Support Portal User Registration, Step 4

The user completes the required fields in the Access Code sub-section. For enhanced security, OCSS requires users to enter an access code each time they log in. Users can select one of two options to receive the access code: **Voice**, a phone call, or **Text**, a text message on their cell phone.

The user also completes the required Security Information fields; Figure 1-7 shows an example of this page.

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Figure 1-7: Child Support Portal User Registration, Step 5

To submit their registration, the user clicks **Submit**.

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Figure 1 -8 shows a summary of the entered information.

Figure 1-8: Child Support Portal User Registration, Step 6

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To update any information, the user clicks **Return to Make Changes** and then makes the changes.

To receive a call or text message to enter an access code, the user clicks **Request**:

1. As part of two-factor authentication, the system calls the user (**Voice** option) or sends a text message (**Text** option) with an access code to the phone number selected on the Child Support Portal User Registration page; see Figure 1 -6.
2. The user must enter the access code to complete the registration process.
3. When the user clicks **Confirm**, the Child Support Portal User Registration Request Submitted page displays to inform the user their registration is complete; Figure 1 -9 shows an example of this page.
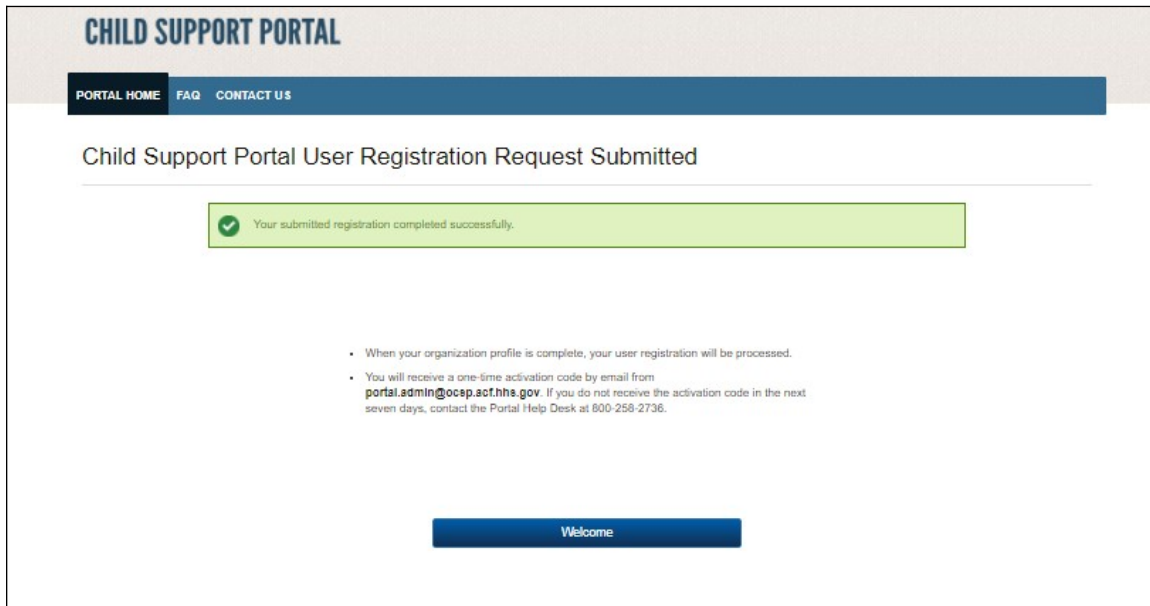
Figure 1-9: Child Support Portal User Registration Request Submitted

When the user clicks **Welcome**, the Welcome to the Child Support Portal page opens. The next part, "Activation," covers activating the user's account.

This portion of registration is complete. The Help Desk emails the user an access code so that the user can complete the activation process and log into the Portal.

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2   Activation

On the **Portal Home** tab on the Welcome to the Child Support Portal Page (see Figure   1 -1), the user clicks a user affiliation to open the This Portal Page Is For You If page. Figure   1 -2 on page 3 shows this page; Chart   1 -2 on page 3 defines the functions available.

In the **Register or Login** box, the user clicks **Log In**; the Log In Certification page opens. Figure   2 -10 shows this page.

Figure 2-10: Log-In Certification

The user takes the following steps:

1. Selects the **I Accept** check box to accept the terms of the agreement
2. Enters their user ID
3. Clicks **Enter**

Chart   2 -4 defines the functions available on the Log In Certification page.

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Chart 2-4: Log In Certification	
Element	Description
I Accept	Certifies the user agrees to the terms of the agreement
Log In using User ID	Allows the user to access the Portal by entering a user ID
Forgot User ID?	Opens the Forgot User ID page
Log In using PIV card	Allows the user to access the Portal using a PIV card (internal users only)
Cancel	Cancels the login attempt and returns to the This Portal Page Is For You If page
i (information link)	Provides more information about PIV card access

When the user clicks **Enter**, the User Activation page opens for the user to complete their account activation. Figure 2-11 shows this page.

Figure 2-11: User Activation

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Chart 2 -5 defines the functions available on the User Activation page.

Chart 2-5: User Activation	
Element	Description
User ID	Displays a system-generated user ID
Activation Code	Allows the user to enter the activation code the Portal sent
Password	Allows the user to enter a password
Forgot/Change Password	Opens the Forgot/Change Password page to reset the password
Challenge Questions	Requires the user to answer the questions

When the user clicks **Submit**, the Activation Confirmation page opens. Figure 2 -12 shows an example with a message confirming the user's account is activated.
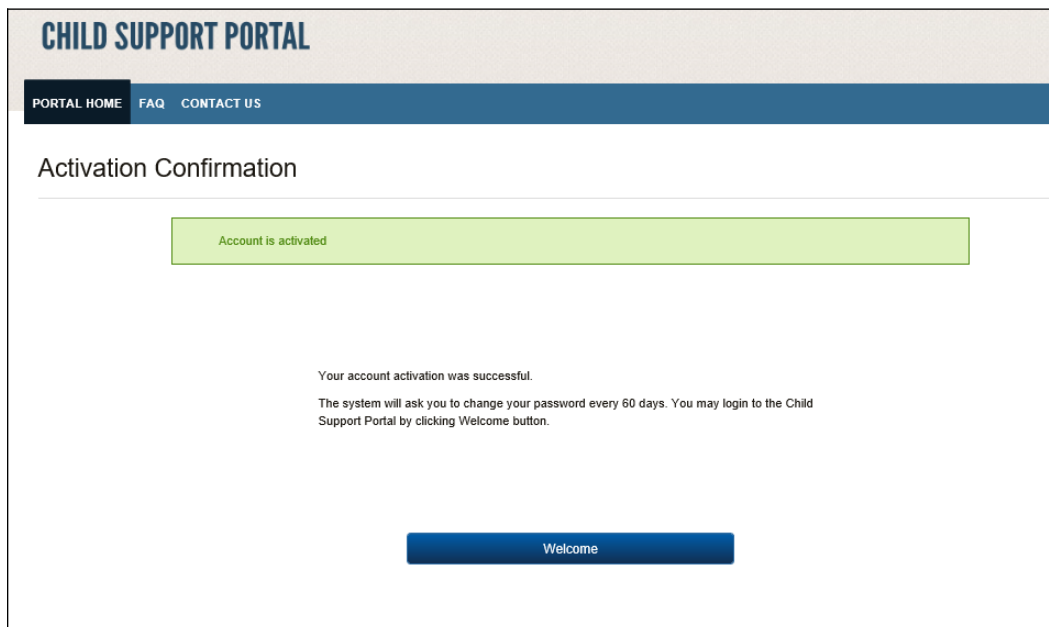
Figure 2-12: Activation Confirmation

When the user clicks **Welcome**, the Welcome to the Child Support Portal page opens.

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3   Log In

This Portal Page is for You If page is where the user initiates the logging-in process. Figure   1 -2 on page Error: Reference source not found shows this page; Chart   1 -2 on page 3 defines the functions available on this page.

In the **Register or Log In** section, when the user click **Log In**, the Log In Certification page opens. Figure   2 -10 on page 1 shows this page; Chart   2 -4 on page 2 defines the functions available on this page.

The user takes the following steps:

1. Selects the **I Accept** check box to accept the terms of the agreement
2. Enters their user ID
3. Clicks **Enter**

When the user clicks **Enter**, the Log In page opens. Figure   3 -13 shows an example of this page.
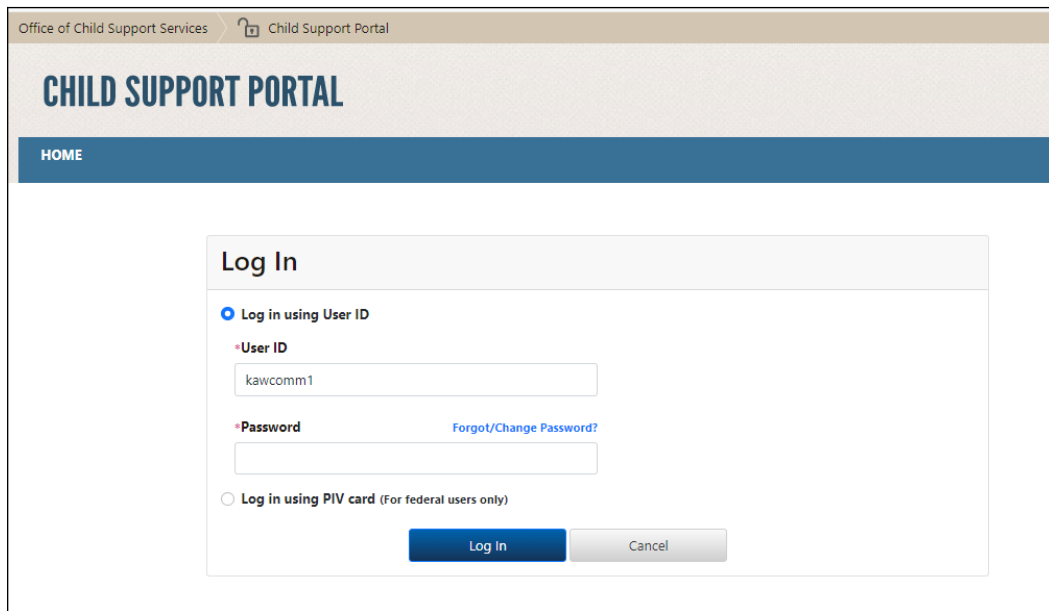
Figure 3-13: Log In

Chart   3 -6 defines the functions available on the Log In page.

Chart 3-6: Log In	
Element	Description
User ID	Shows the user ID from the This Portal Page Is For You If page (see Figure 1 -2); the user can change this

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Chart 3-6: Log In	
Element	Description
Password	Enters a password
Forgot/Change Password?	Opens the Forgot/Change Password page

The user enters their password and then clicks **Log In**.

Figure   3 -13 shows the Log In – Enter Access Code page.
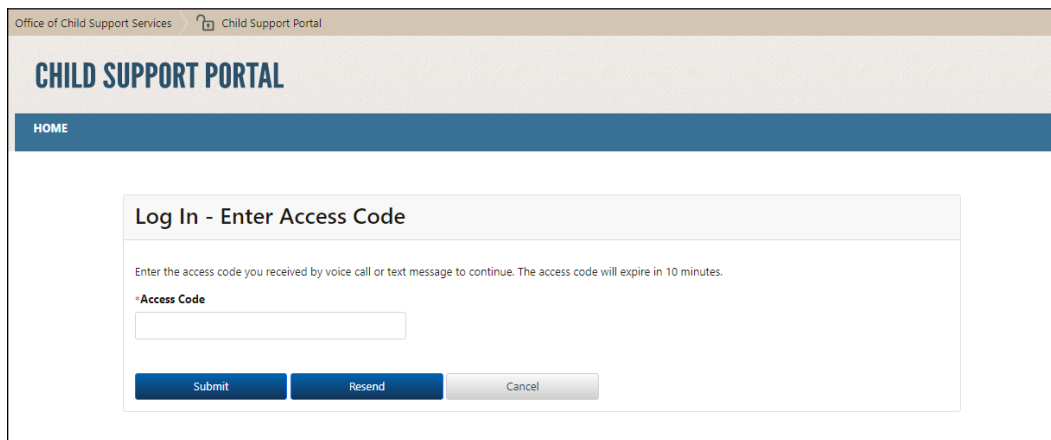
Figure 3-14: Log In – Enter Access Code

Chart   3 -7 Error: Reference source not found defines the function available on the Log In – Enter Access Code page.

Chart 3-7: Log In – Enter Access Code	
Element	Description
Access Code	Enters the access code received by email or text (chosen during registration)

The user enters their access code received by voice (phone call) or a text message and then clicks **Submit**.

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The Child Support Portal Home page opens; Figure 3-15 shows an example of this page.
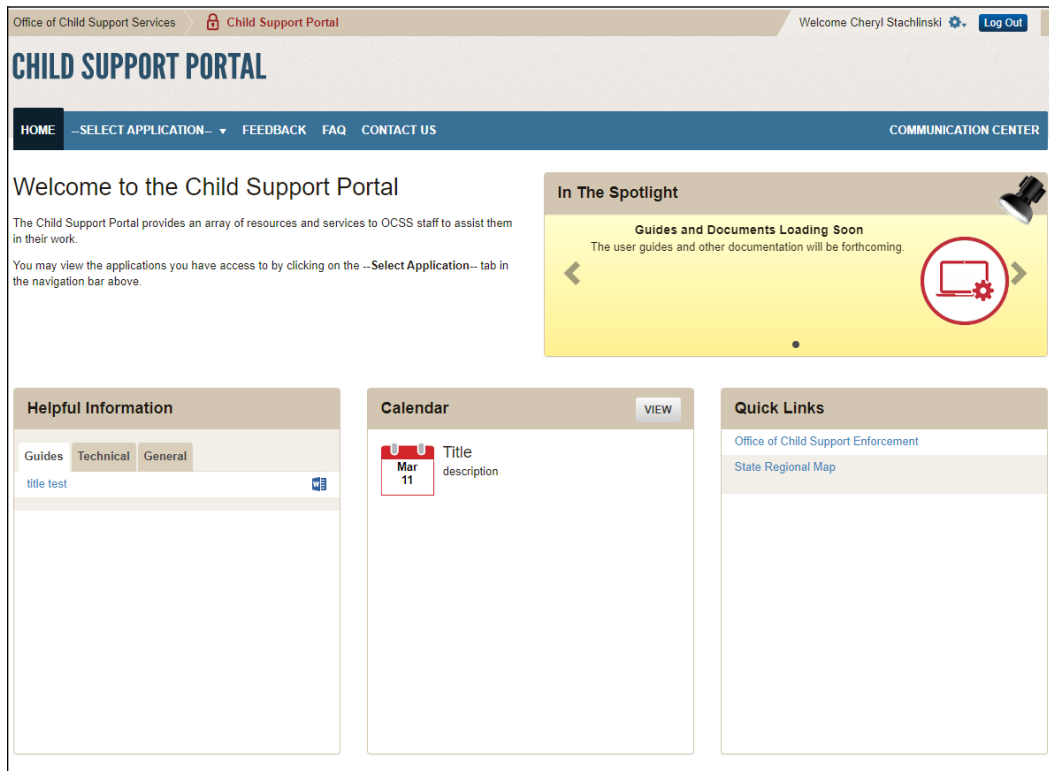
Figure 3-15: Child Support Portal Home Page

Chart 3-8 defines the functions available on this page.

Chart 3-8: Child Support Portal Home Page	
Element	**Description**
Welcome <User Name>	Allows users to update their account profile
Broadcast Messages	Shows messages of interest for Portal users of all affiliations, such as availability, upcoming maintenance, and changes
Secure Home	Labels the Portal Home Page
Select Application	Lists Portal application the user has privileges for and can select
Feedback	Submits feedback about the Portal or a Portal application
FAQ	Displays FAQs about the Portal
Contact Us	Displays Help Desk contact information
In the Spotlight	Displays information about new items or events on the Portal
Helpful Information	Shows documents provided for more information

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Chart 3-8: Child Support Portal Home Page	
Element	Description
Calendar	Displays events of interest to users
Quick Links	Provides links to reference information

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4   Profile Updates

When the user clicks **Profile Update** on the left menu of the Child Support Portal Home page (see Figure   3 -15 on page 3), the Profile Update page opens; Figure   4 -16 shows an example of this page.

Figure 4-16: Profile Update

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Chart   4 -9 defines the information a user can add or update on this page.

Chart 4-9: Profile Update	
Element	**Description**
Update Personal Information and Work Location Section	Displays the user's personal and work location information
Update Security Information Section	Displays the challenge questions the user selected and the responses the user provided
User Access Control Section	Displays access code options – **Voice** or **Text** – used for two-factor authentication
Request	Requests an access code
Update	Saves and confirms the account update
Reset	Resets fields to the previously saved information or, if nothing was saved, blank fields
Cancel	Cancels the transaction and opens the Welcome to Child Support Portal page
Inactivate Account	Disables the account

Figure   4 -17 shows the Profile Update Confirmation page displayed when the user updates their account.
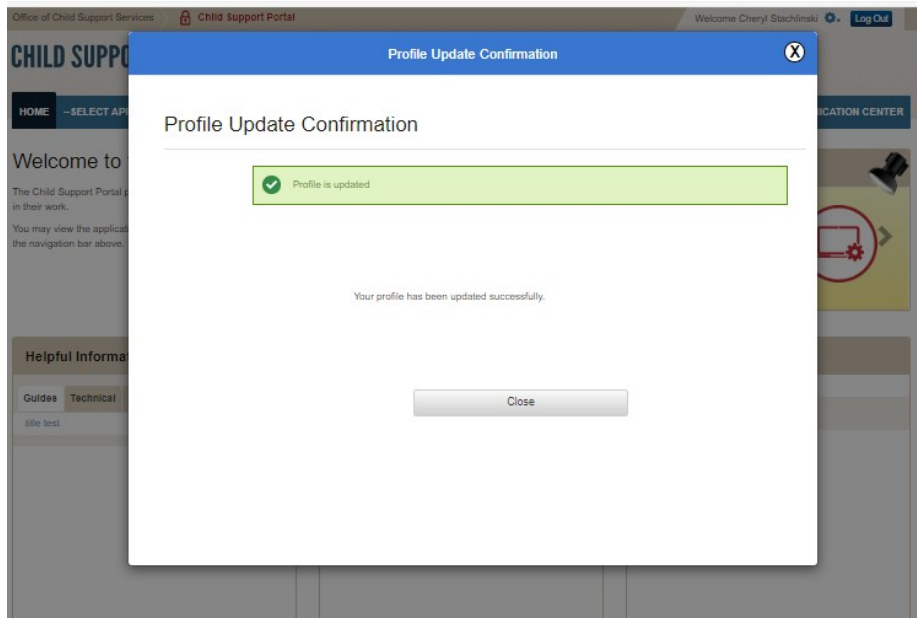
Figure 4-17: Profile Update Confirmation
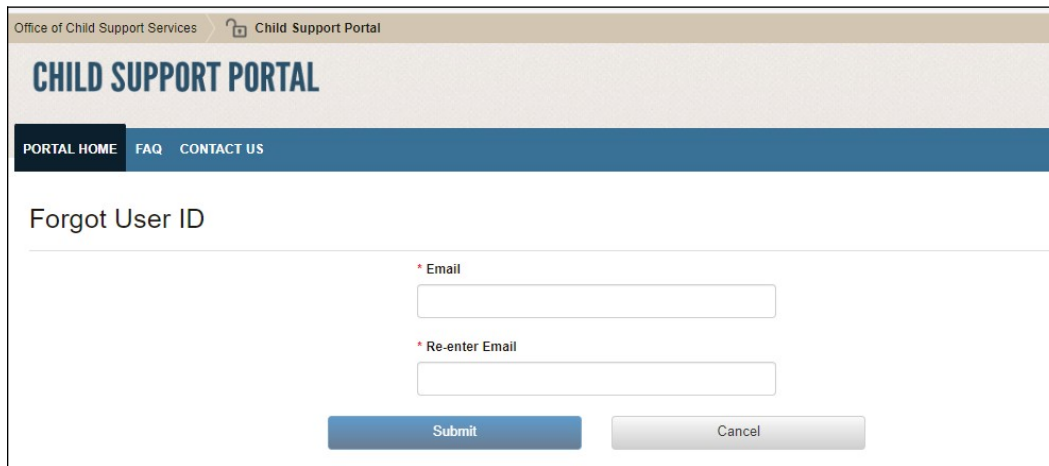
When the user clicks **Close**, the Welcome to the Child Support Portal page reopens.

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5 Credential Management

Each time the user wants to access the Portal, they go to the Log In Certification page. Figure 2 -10 on page 1 shows this page; Chart 2 -4 on page 2 defines the functions available on this page.

To accept the terms of the agreement, the user selects the **I Agree** check box.

If the user does not remember their user ID, they click **Forgot User ID?** Figure 5 -18 displays the Forgot User ID page. They can also use the chatbot; for instructions, see Part 7, "Chatbot."

Figure 5-18: Forgot User ID

Chart 5 -10 defines the functions available on this page.

Chart 5-10: Forgot User ID	
Element	Description
Email Address	Enters an email address to request the user ID
Re-enter Email Address	Re-enters the email address to confirm it

When the user clicks **Submit**, the Credential Management – Forgot User ID Confirmation page opens. Figure 5 -19 shows this page with the message confirming to the user the system sent the user ID to their email account.

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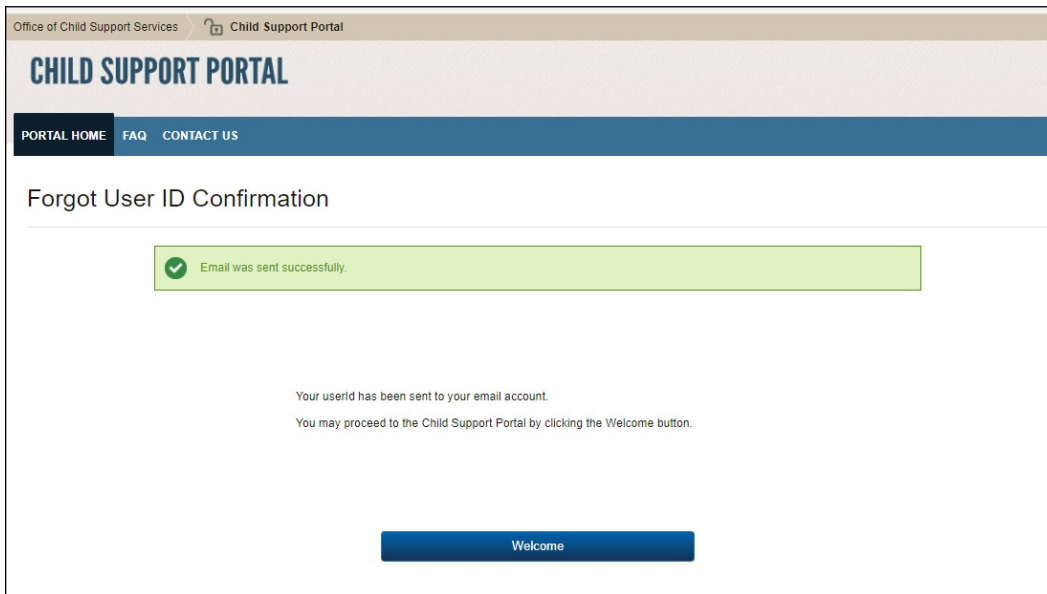
Figure 5-19: Credential Management – Forgot User ID Confirmation

To restart the log-in progress, the user clicks **Welcome**.

The Log In page is also where the user can change their password. Figure 5 -20 shows an example of this page.
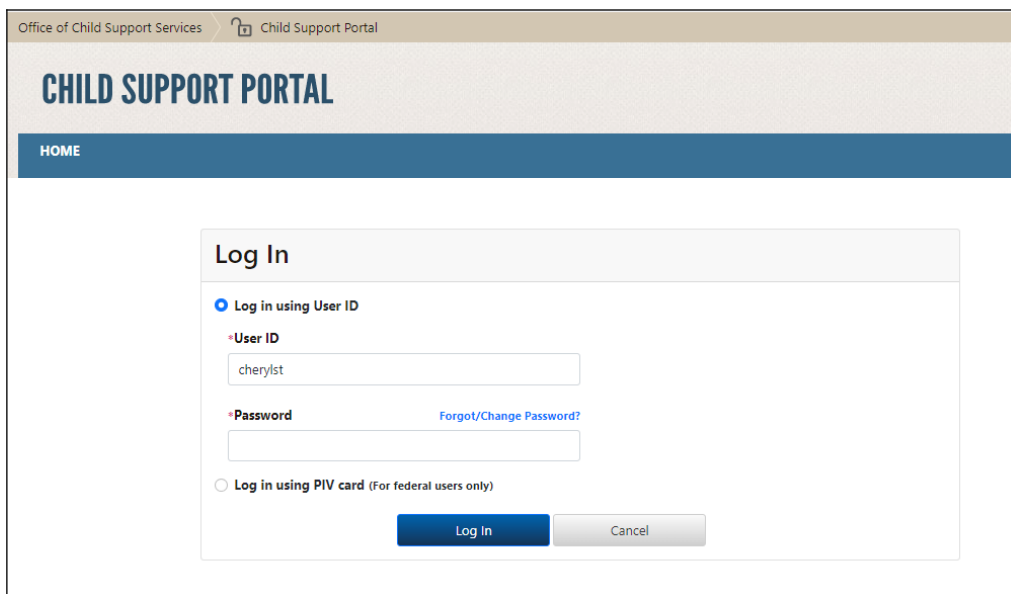
Figure 5-20: Log In – Forgot/Change Password

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Chart   5 -11 defines the functions available on the Log In – Forgot User ID page.

Chart 5-11: Log In – Forgot/Change Password	
Element	Description
Password	Enters a password
Forgot/Change Password?	Opens the Forgot/Change Password page
Access Code	Enters the access code received by phone call or text (selected during registration)
Cancel	Returns to the Welcome to the Child Support Portal page

The user clicks **Forgot/Change Password?**

The user clicks **Log In** to authenticate the password.

If the user forgot or wants to change their password, they click **Forgot/Change Password?** The Forgot/Change Password page opens; Figure   5 -21 shows an example of this page.
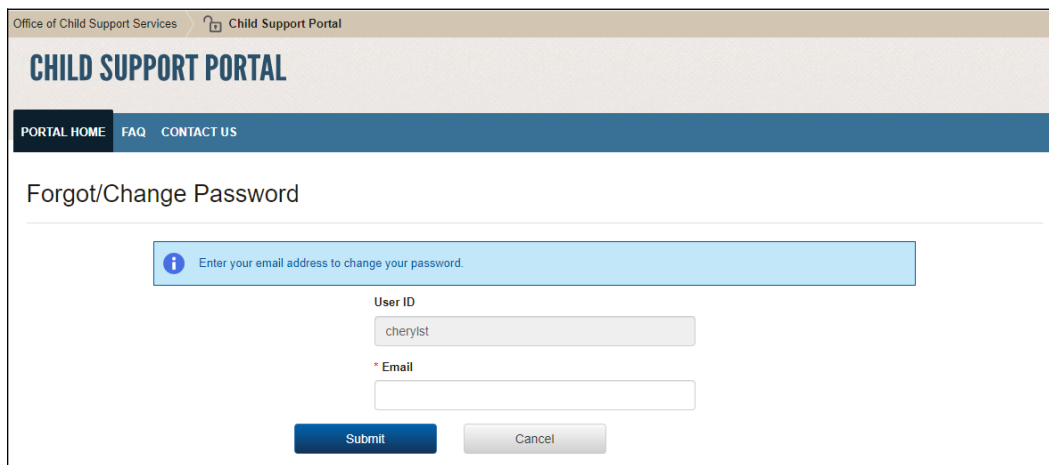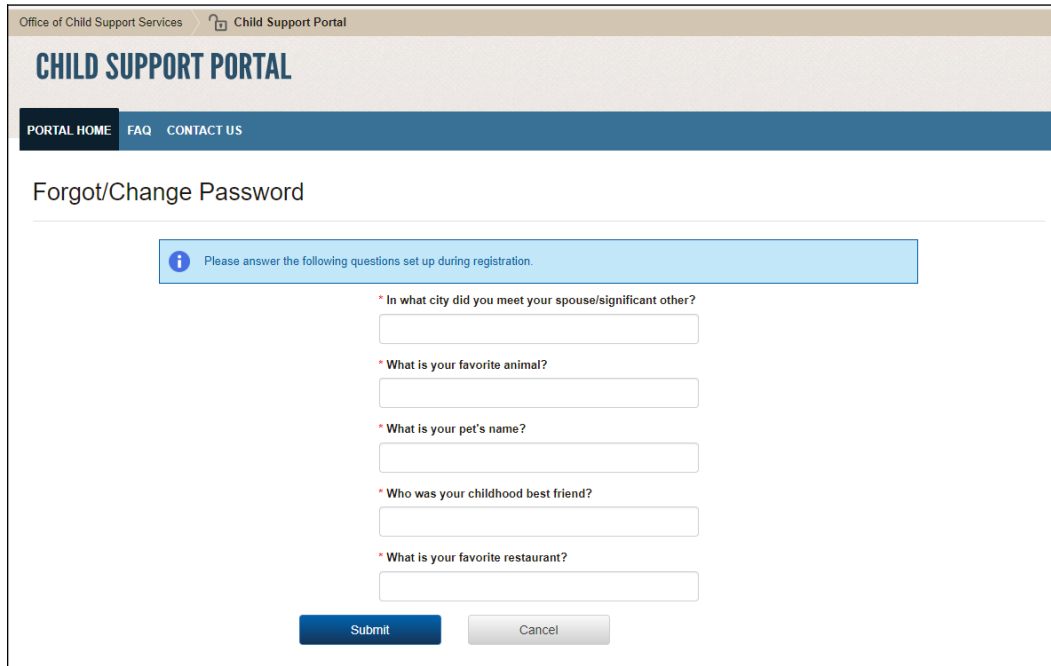
Figure 5-21: Forgot/Change Password

Chart   5 -12 defines the functions available on the Forgot/Change Password page.

Chart 5-12: Log In Forgot/Change Password	
Element	Description
User ID	Displays a system-generated user ID
Email	Enters an email address associated with the user ID
Submit	Sends the request to change the user's password
Cancel	Returns to the Welcome to the Child Support Portal page

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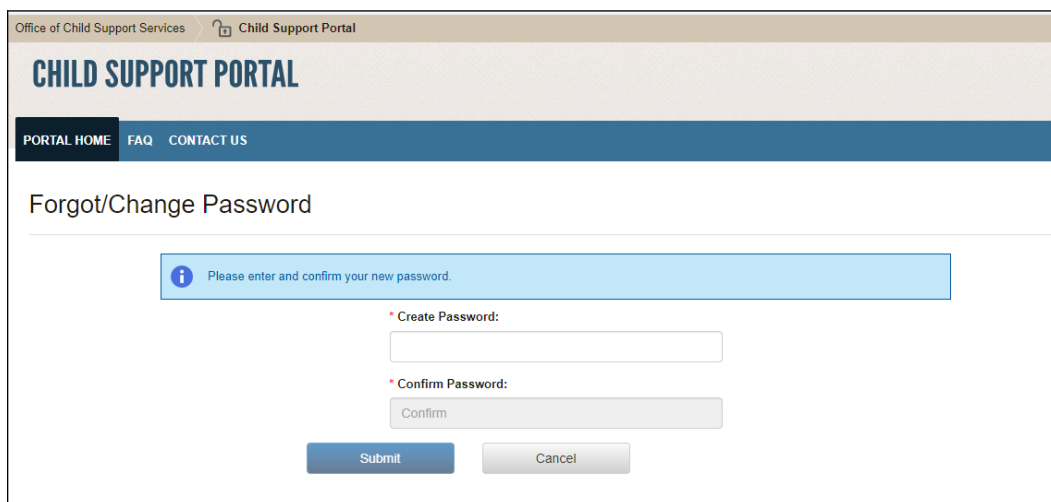
The user enters an email address to access to the password reset page and then clicks **Submit**. The Forgot/Change Password – Challenge Questions page opens. Figure 5 -22 shows an example of the page where the user answers the challenge questions they selected on the Profile Update page; see Figure 4 -16 on page 1.

Figure 5-22: Forgot/Change Password – Challenge Questions

The user answers the challenge questions, and then clicks **Submit** to open the Forgot/Change Password –Reset Password page. Figure 5 -23 shows an example of this page.

Figure 5-23: Forgot/Change Password – Reset Password

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Chart   5 -13 defines the functions available on this page.

Chart 5-13: Forgot/Change Password (Reset Password)	
Element	Description
Create Password	Enables the user to enter a new password
Confirm Password	Enables the user to confirm the new password
Submit	Submits the reset password request

The user enters a new password, enters it again to confirm it, and then clicks **Submit**. The Change Password Confirmation page opens; Figure   5 -24 shows an example of this page with the password change confirmation message.
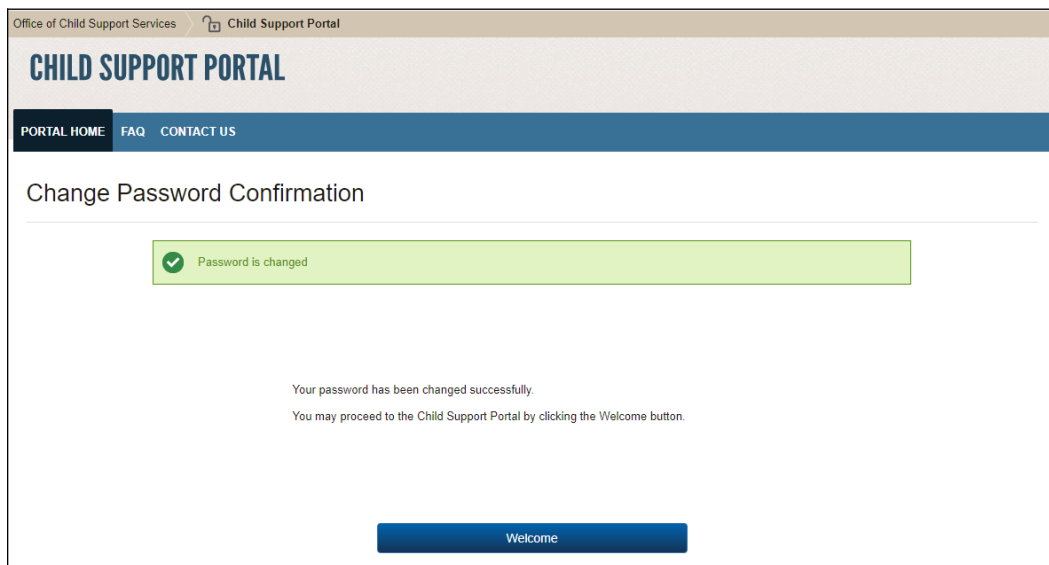
Figure 5-24: Change Password Confirmation

When the user clicks **Welcome**, the Welcome to the Child Support Portal page reopens.

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6   General Pages

Figure   6 -25 displays the timeout warning message.
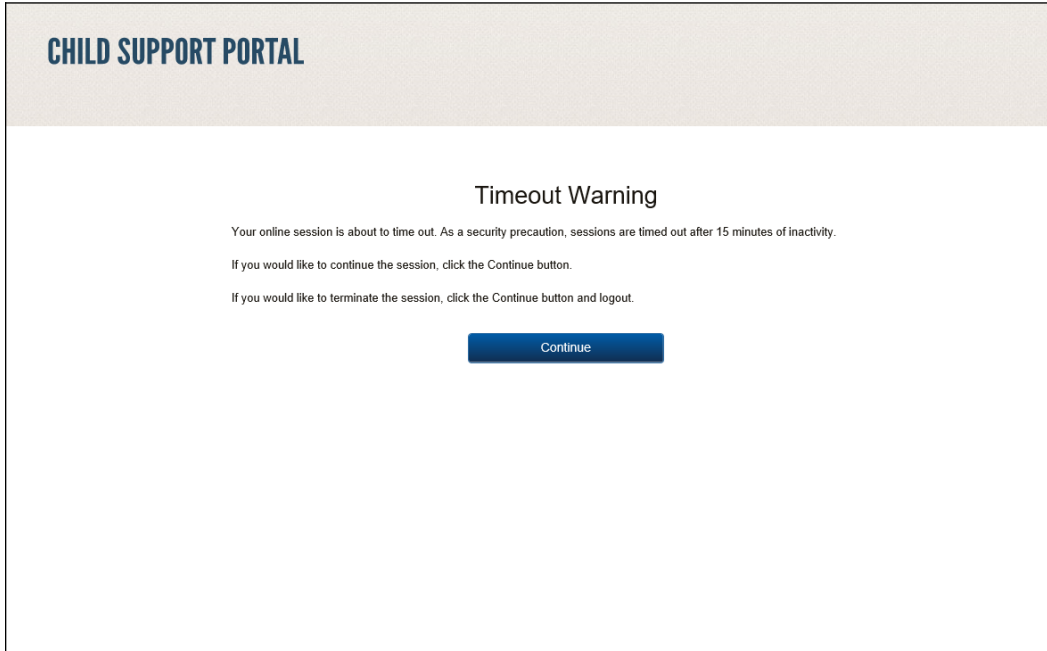
Figure 6-25: Timeout Warning

To refresh the session, close the browser, and return to the previously displayed page, the user clicks **Continue**.

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Figure   6 -26 displays the Session Timed Out message. When the user receives this message, they must log in again.
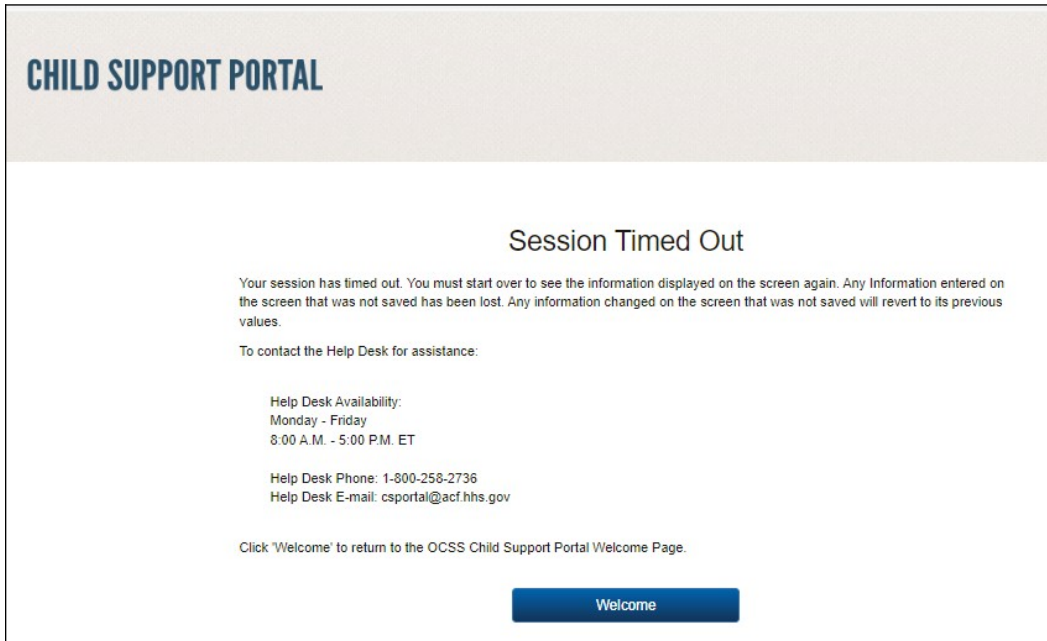
Figure 6-26: Session Timed Out

When the user clicks **Welcome**, the Welcome to the Child Support Portal page reopens.

Figure   6 -27 displays an example of a system error page.

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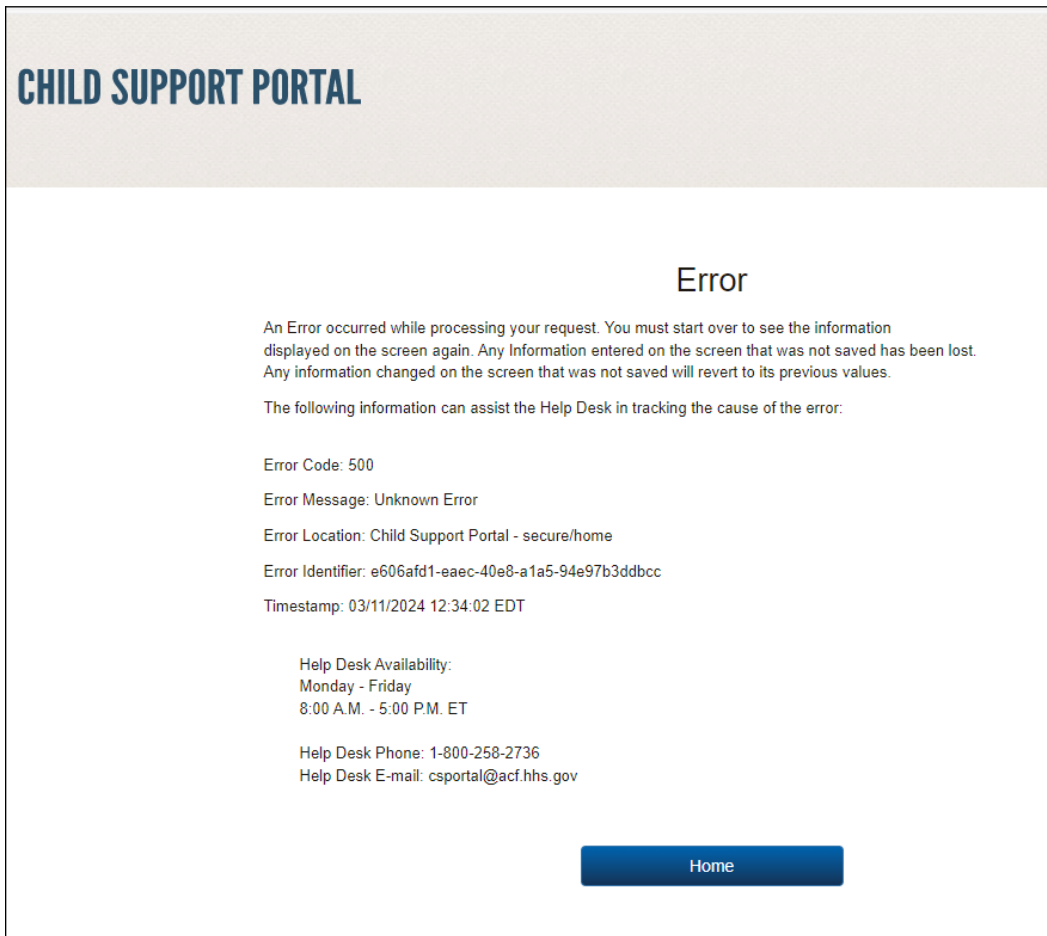
Figure 6-27: System Error

When the user clicks **Home**, the Welcome to the Child Support Portal page reopens.

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Figure 6-28 displays a message informing the user that the system locked their account because of the number of invalid log-in attempts. To unlock their account, the user must contact the Help Desk or use the chatbot. (For instructions, see Part 7, "Chatbot.")
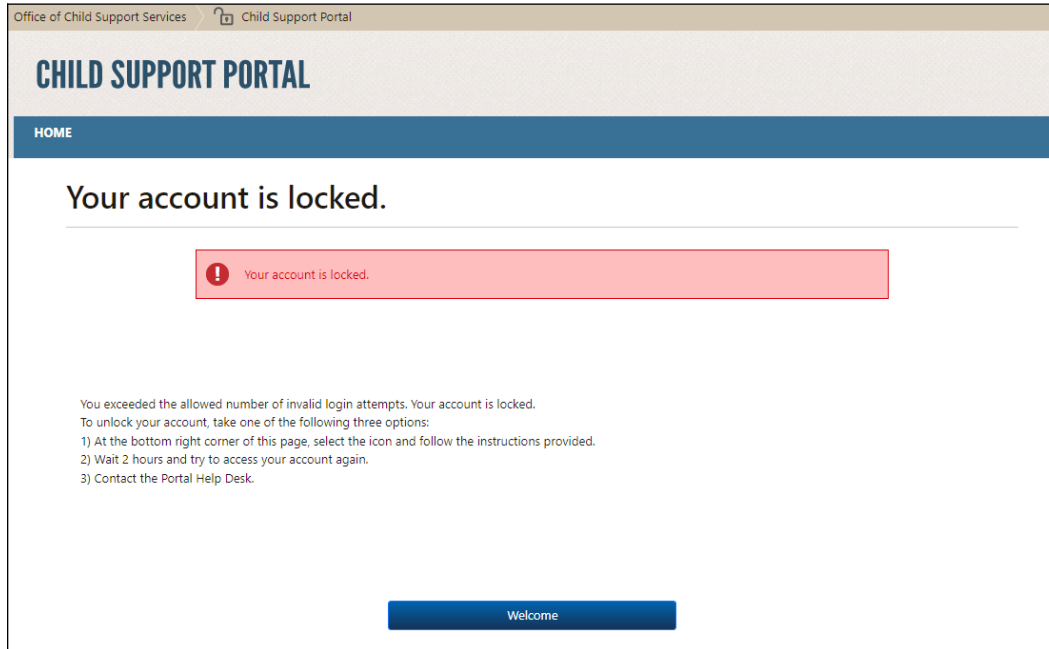
Figure 6-28: Account Locked (Credential Management and Activation Page)

When the user clicks **Welcome**, the Welcome to the Child Support Portal page reopens.

Figure 6-29 displays the Frequently Asked Questions (FAQ) page with answers to frequently asked questions about Portal applications. The link for this page is on the header of all applications that have an associated FAQ page; not all applications do. Figure 5-18 on page 1 shows an example of the FAQ link.

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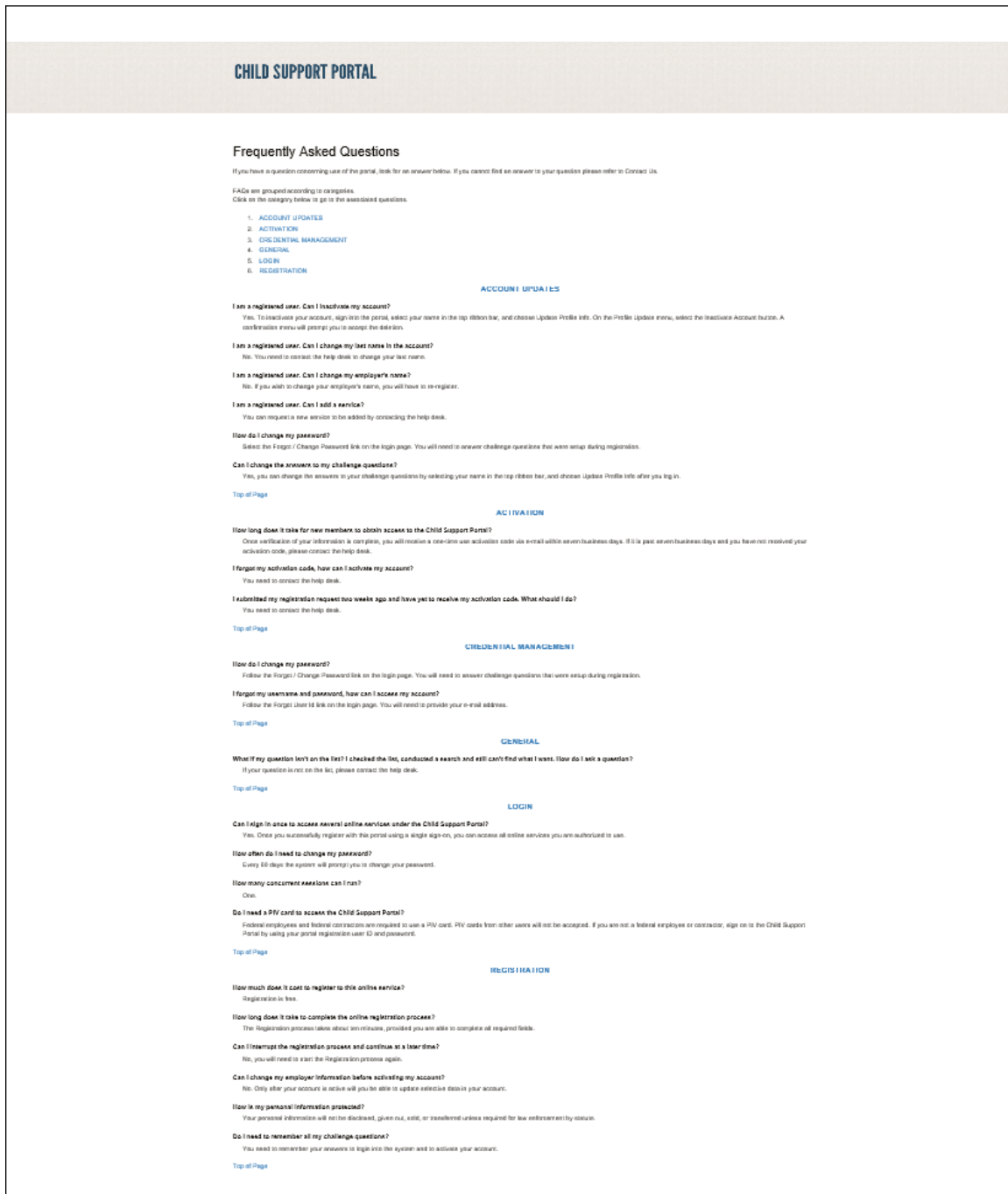
Figure 6-29: Frequently Asked Questions

Chart 6 -14 defines the functions available on the Frequently Asked Questions page.

Chart 6-14: Frequently Asked Questions	
Element	Description
Category List	Displays the FAQ in that section

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Chart 6-14: Frequently Asked Questions	
Element	Description
Top of Page	Returns to the top of the page

Figure 6 -30 displays the Contact Us information for the Portal Help Desk.

Figure 6-30: Contact Us

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Expires: xx/xx/xxxx
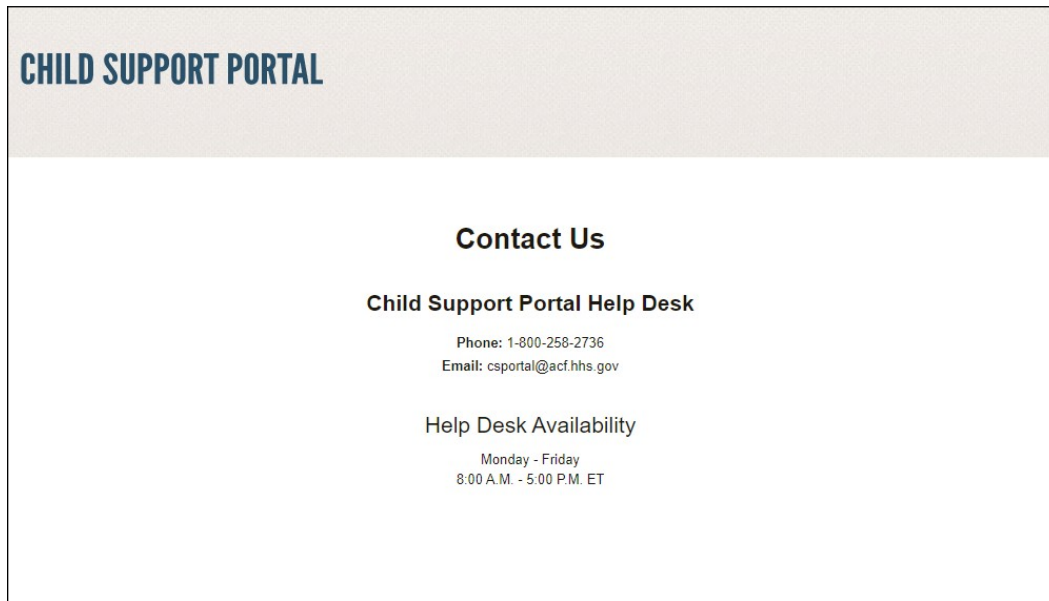
Figure   6 -31 shows the security alert message displayed when the user's system has an issue with the site security.

Figure 6-31: Security Alert – User Accepts Certificate

The user takes one of the following actions:

- To open the Welcome to Child Support Portal, clicks **Yes**.

- To cancel the current operation, clicks **No**.

- To open the certificate information, clicks **View Certificate**.

Figure   6 -32 shows the message the system sends the user before inactivating their account.

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Expires: xx/xx/xxxx
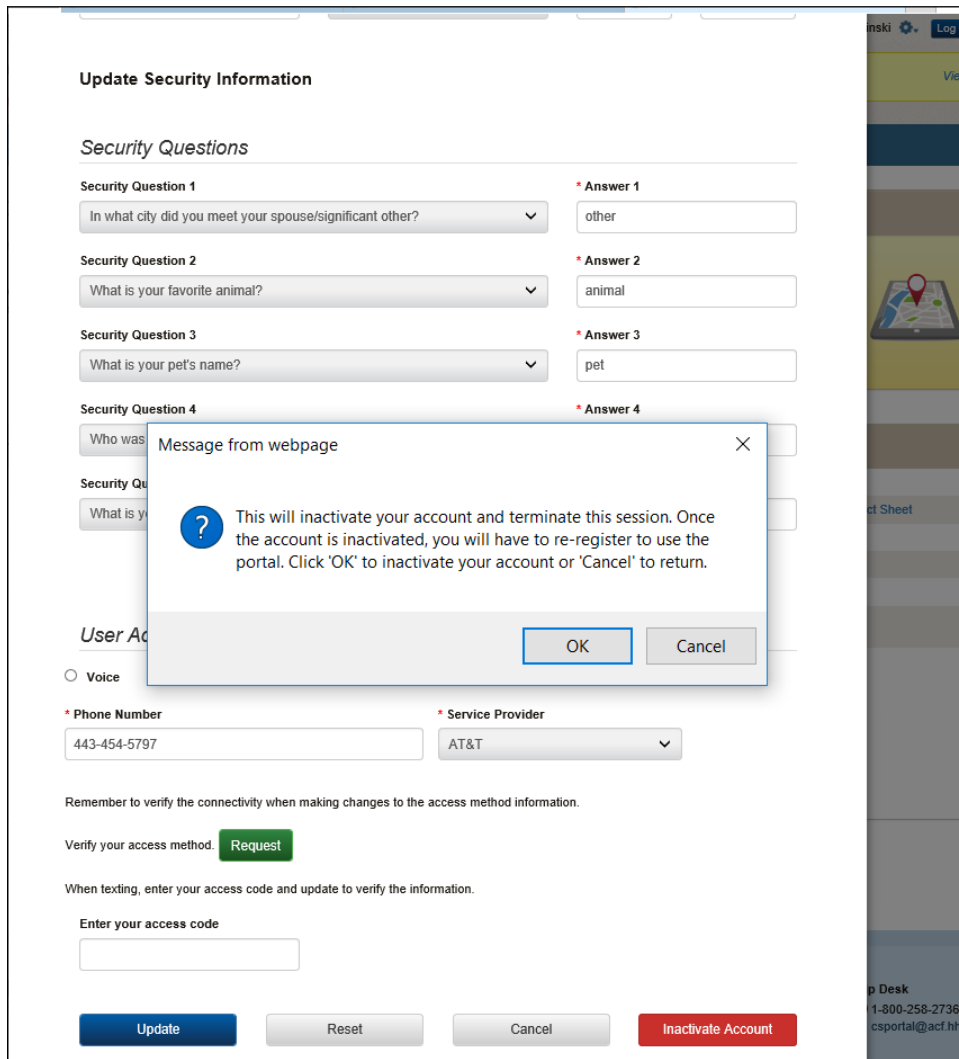
Figure 6-32: Disable Account Message

To inactivate their account, the user clicks **OK.**

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7 Chatbot

A chatbot is an interactive chat system that helps the user to reset their password or unlock their account without Help Desk intervention.

Before accessing the Portal, when the user hovers over the chatbot icon in the bottom right corner of the footer, the message in Figure 7 -33 displays in the information box.
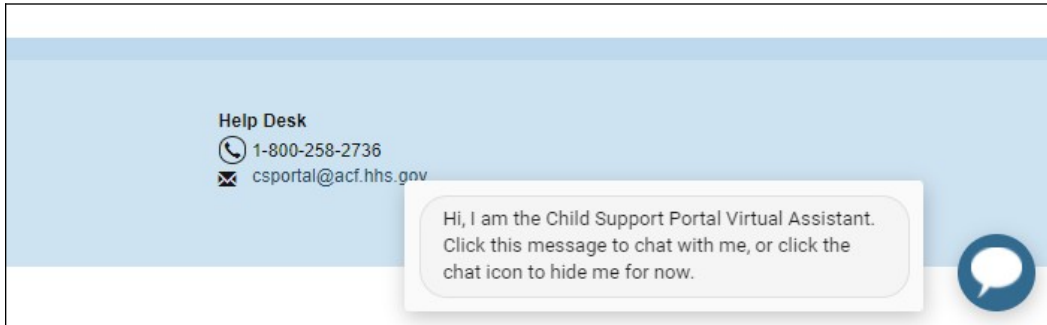
Figure 7-33: Chatbot Icon

To open the Child Support Portal Virtual Assistance pop-up, the user clicks inside the information box; Figure 7 -34 shows the first Portal Virtual Assistant pop-up.

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Expires: xx/xx/xxxx
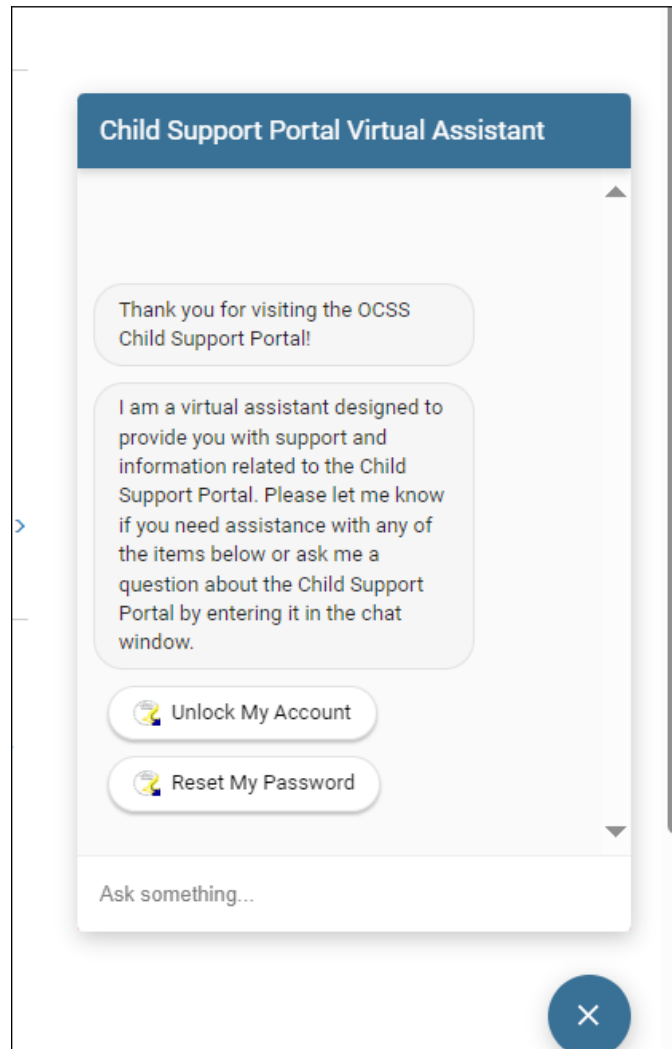
Figure 7-34: Portal Virtual Assistant

To start the process to unlock their Portal account, the user clicks **Unlock My Account**.

The virtual assistant asks the user to enter their Child Support Portal user ID; Figure 7-35 shows this request.

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Version 4.1
Expires: xx/xx/xxxx
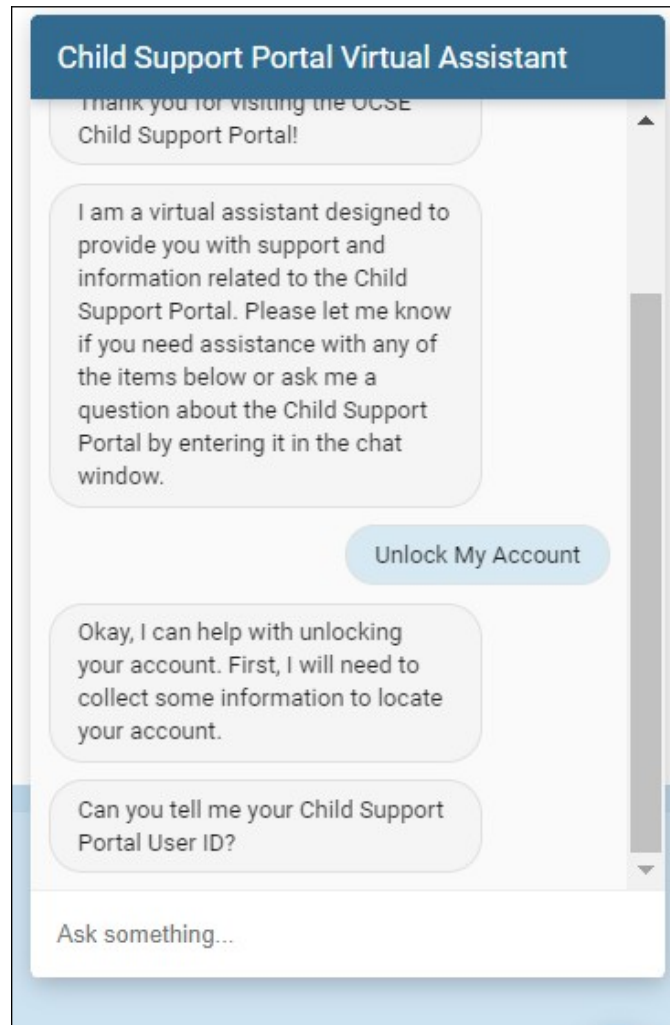
Figure 7-35: Portal Virtual Assistant, Account Unlock – User ID

The user enters their user ID and clicks **Enter**.

The virtual assistant prompts the user for the email address associated with their user ID; Figure 7 -36 shows this request.

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Expires: xx/xx/xxxx
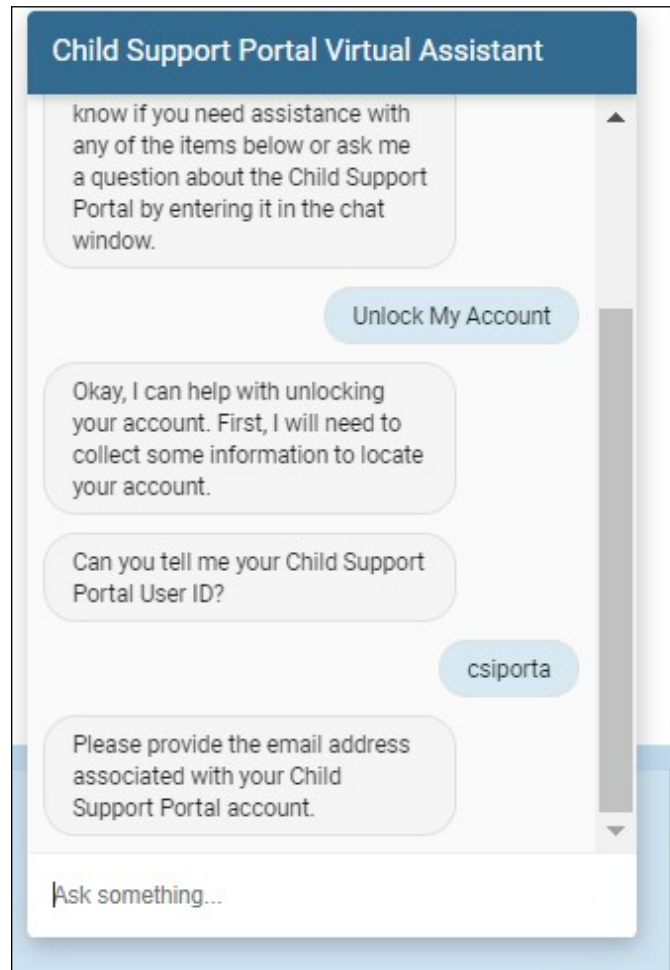
Figure 7-36: Portal Virtual Assistant, Account Unlock – Email Address

The user enters the email address associated with their Portal account and clicks **Enter**.

The virtual assistant informs the user that their Portal account was located (that is, verified) and asks whether they want to continue. Figure 7 -37 shows the verification, the prompt, and the user's options.

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Expires: xx/xx/xxxx
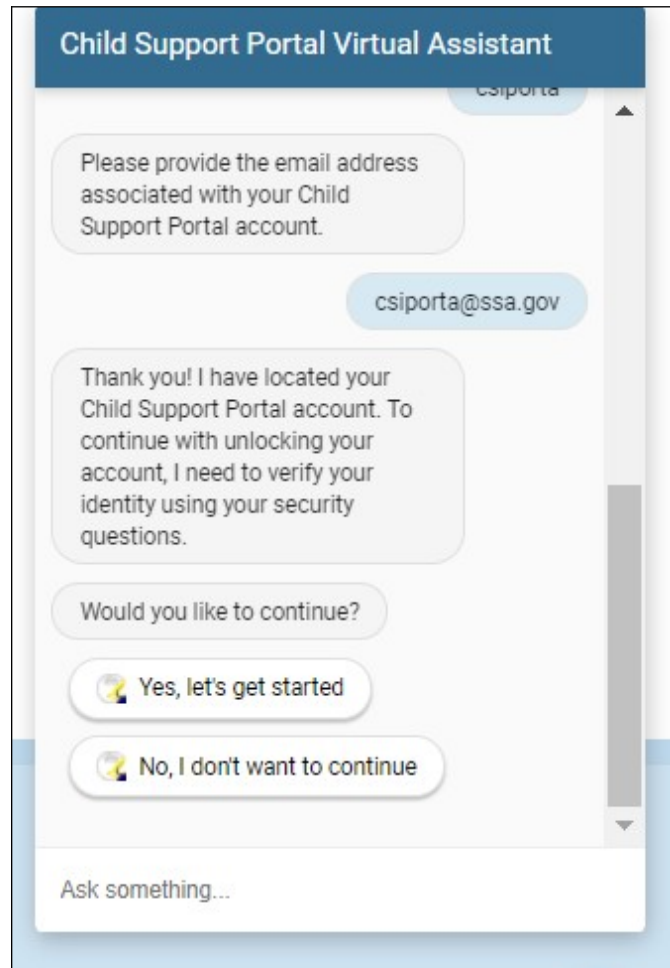
Figure 7-37: Portal Virtual Assistant, Account Unlock – Get Started

The user clicks **Yes, let's get started**. The virtual assistant asks the user to answer the challenge questions they created when they registered their account. Figure 7 -38 shows several example questions and answers.

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Portal User Page Flow
Version 4.1
Expires: xx/xx/xxxx
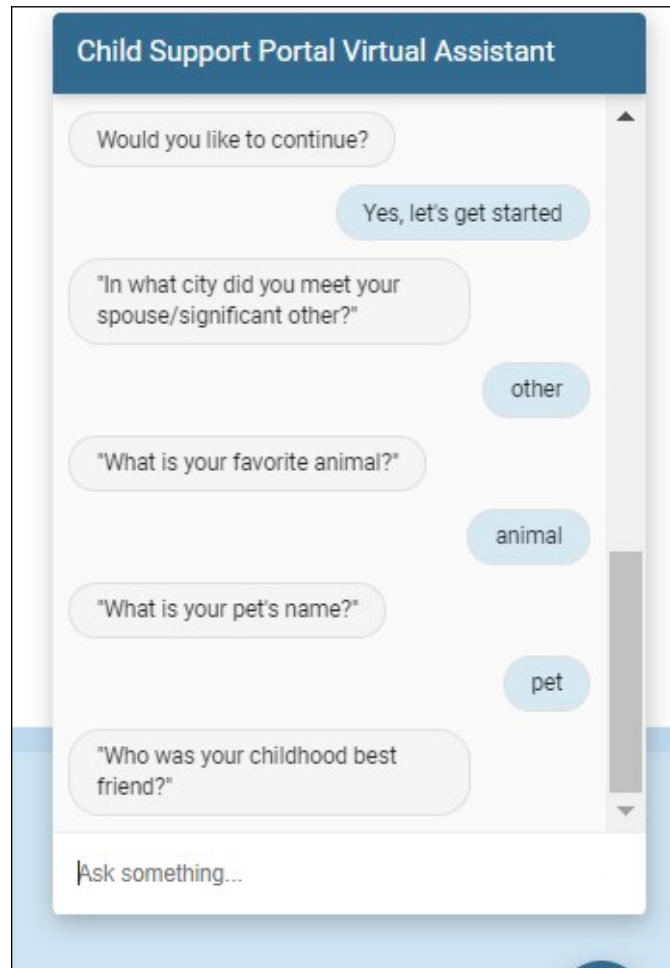
Figure 7-38: Portal Virtual Assistant, Account Unlock – Challenge Questions

If the user answers three or four of the five challenge questions correctly, the virtual assistant asks the user to enter their date of birth and SSN; Figure 7-39 shows this prompt.

Note: If the user answers less than three challenge questions correctly, the user must start over.

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Portal User Page Flow
Version 4.1
Expires: xx/xx/xxxx
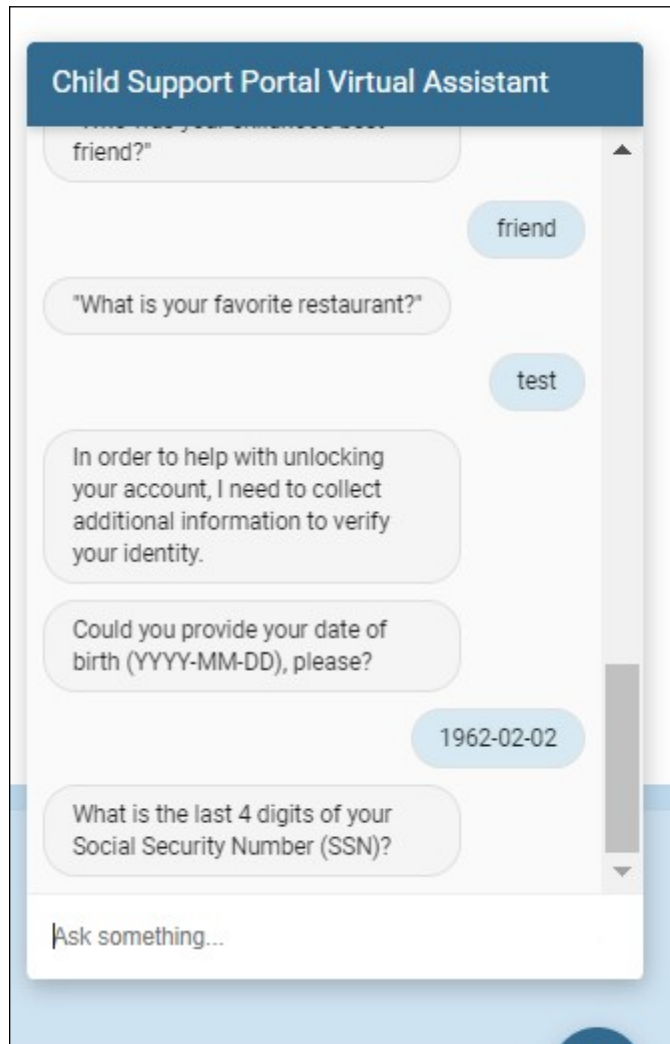
Figure 7-39: Portal Virtual Assistant, Account Unlock – Challenge Questions 3-4 Correct

When the user answers all five challenge questions correctly or enters their correct date of birth and SSN when prompted, their account is unlocked. Figure 7 -40 shows how the virtual assistant informs the user that their account is unlocked and prompts them whether they want to change the password for their Portal account.

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Portal User Page Flow
Version 4.1
Expires: xx/xx/xxxx
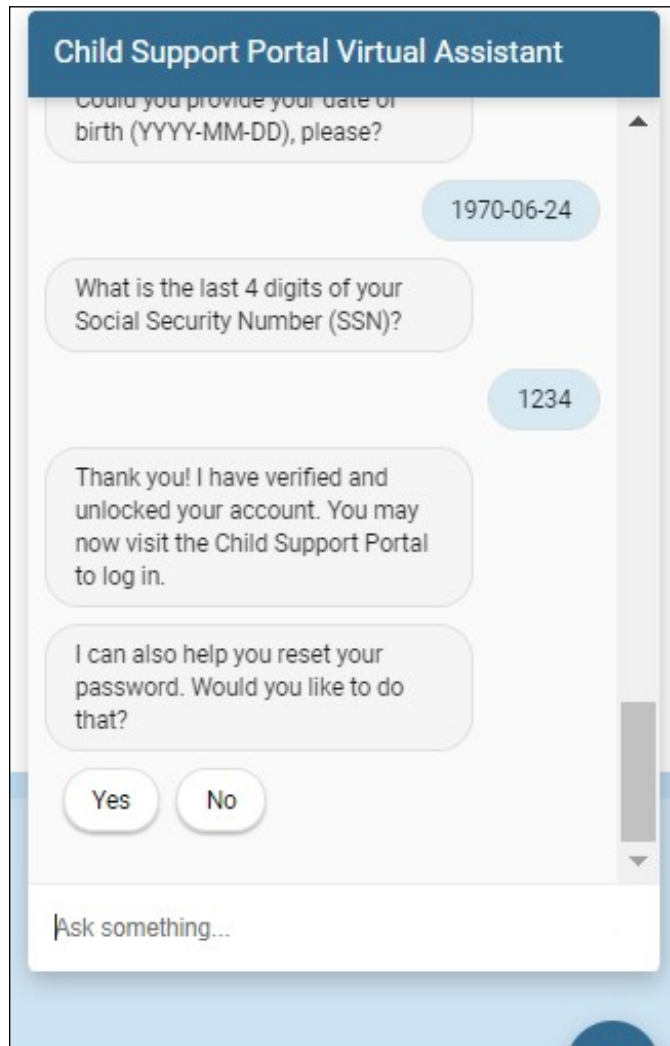
Figure 7-40: Portal Virtual Assistant, Account Unlock – Account is Unlocked

To start the process to reset the user's password, the user clicks **Yes**. When the virtual assistant displays the **Reset My Password** option, the user clicks this option.

The virtual assistant asks the user to enter their Child Support Portal user ID; Figure 7 -41 shows this request.

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Portal User Page Flow
Version 4.1
Expires: xx/xx/xxxx
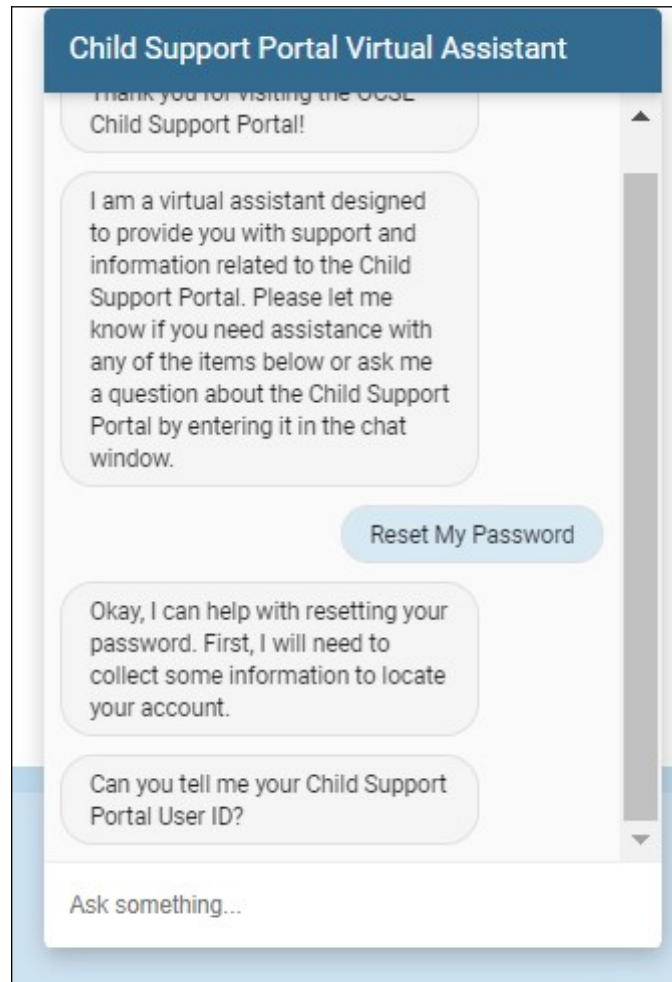
Figure 7-41: Portal Virtual Assistant, Password Reset – User ID

The user enters their user ID and clicks **Enter**.

The virtual assistant prompts the user for the email address associated with their user ID; Figure 7 -42 shows this request.

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Portal User Page Flow
Version 4.1
Expires: xx/xx/xxxx
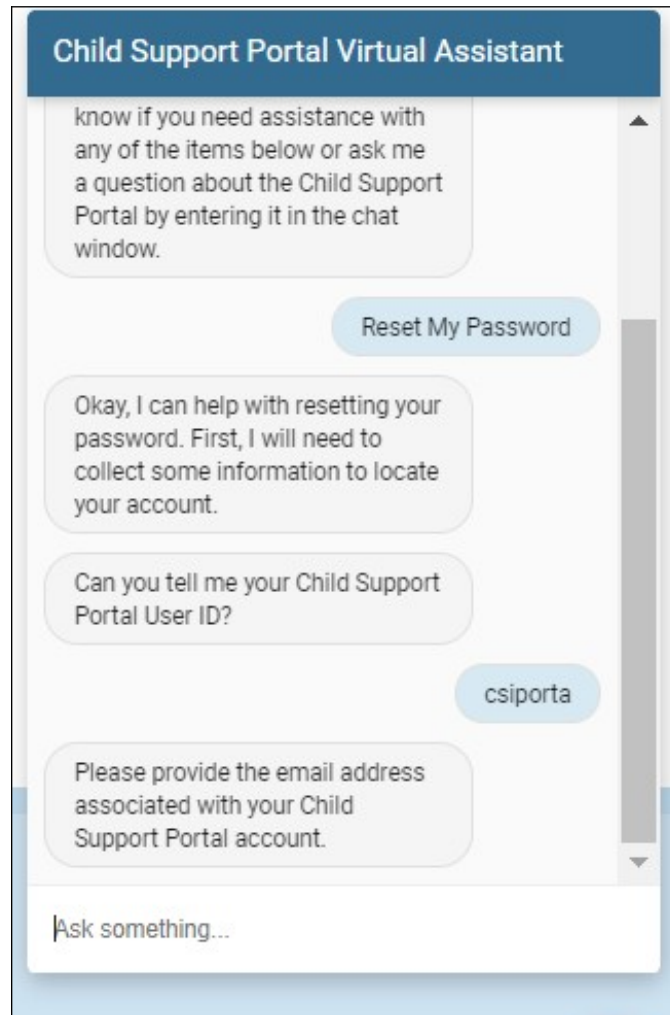
Figure 7-42: Portal Virtual Assistant, Password Reset – Email Address

The user enters the email address associated with their Portal account and clicks **Enter**.

The virtual assistant informs the user that their Portal account was located and asks whether they want to continue. Figure   7 -43 shows the verification, the prompt, and the user's options.

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Portal User Page Flow
Version 4.1
Expires: xx/xx/xxxx
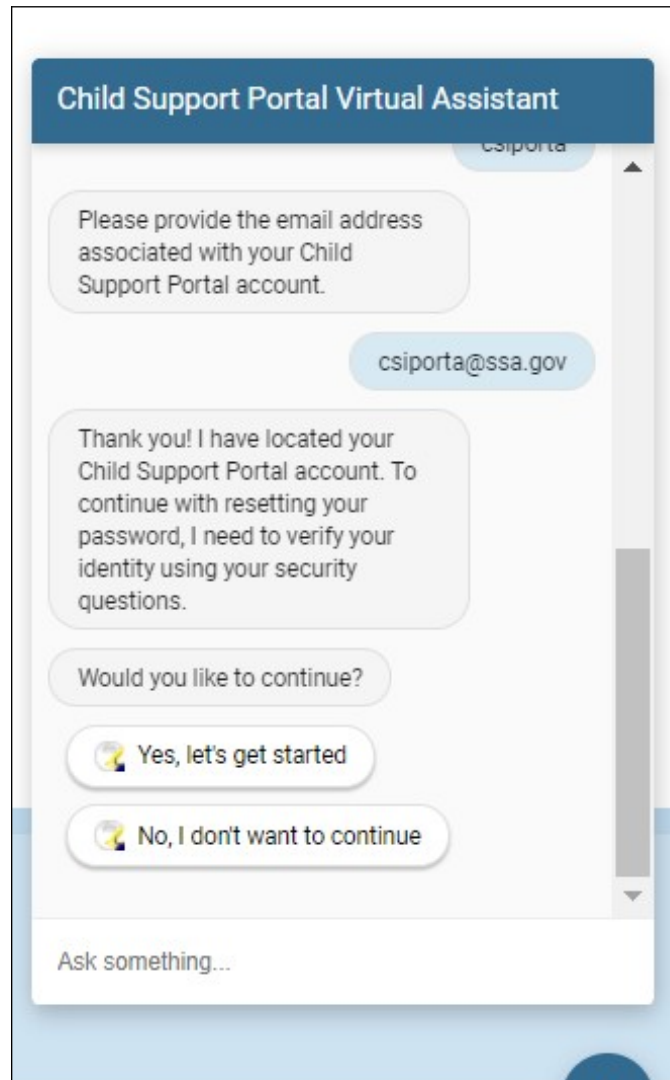
Figure 7-43: Portal Virtual Assistant, Password Reset – Get Started

The user clicks **Yes, let's get started**.

The virtual assistant asks the user to answer challenge questions they created when they registered their account. Figure 7 -44 shows some example questions and answers.

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Version 4.1
Expires: xx/xx/xxxx
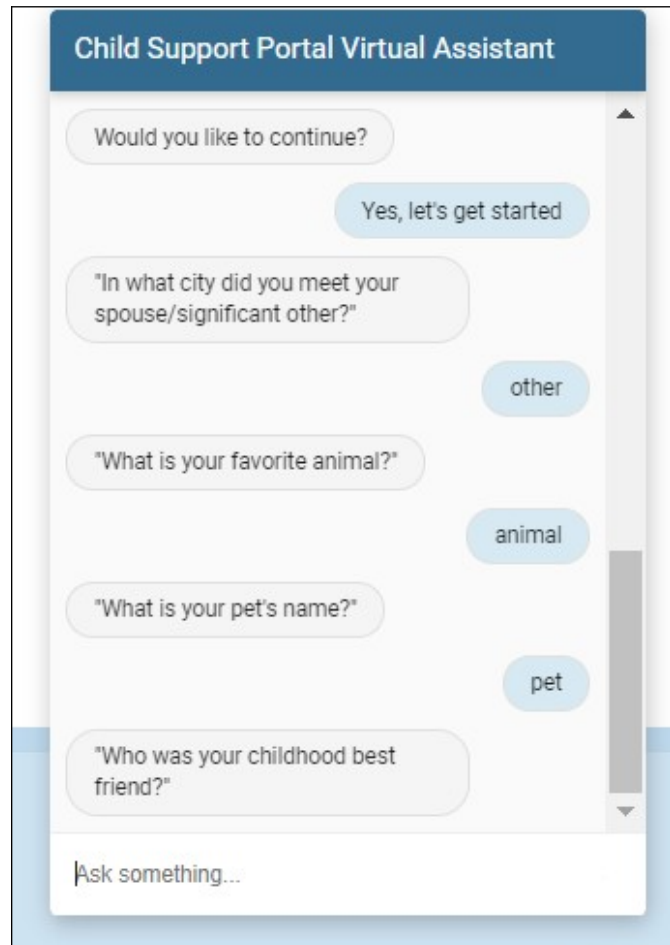
Figure 7-44: Portal Virtual Assistant, Password Reset – Challenge Questions
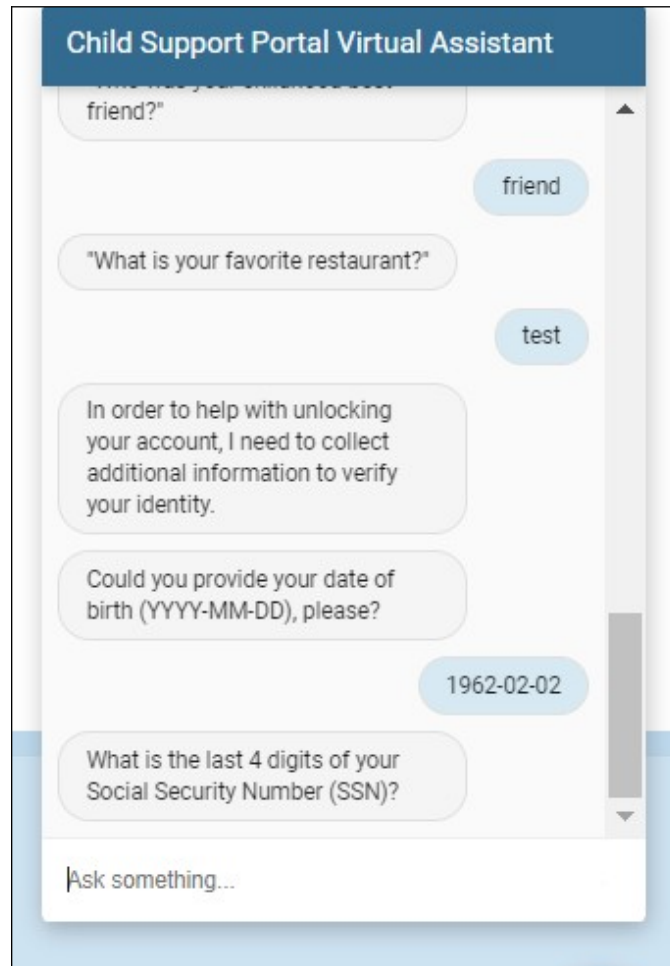
If the user correctly answers three or four of the five challenge questions, the virtual assistant prompts the user to enter their date of birth and SSN. Figure 7 -45 shows these prompts.

Note: If the user answers less than three challenge questions correctly, the user must start over.

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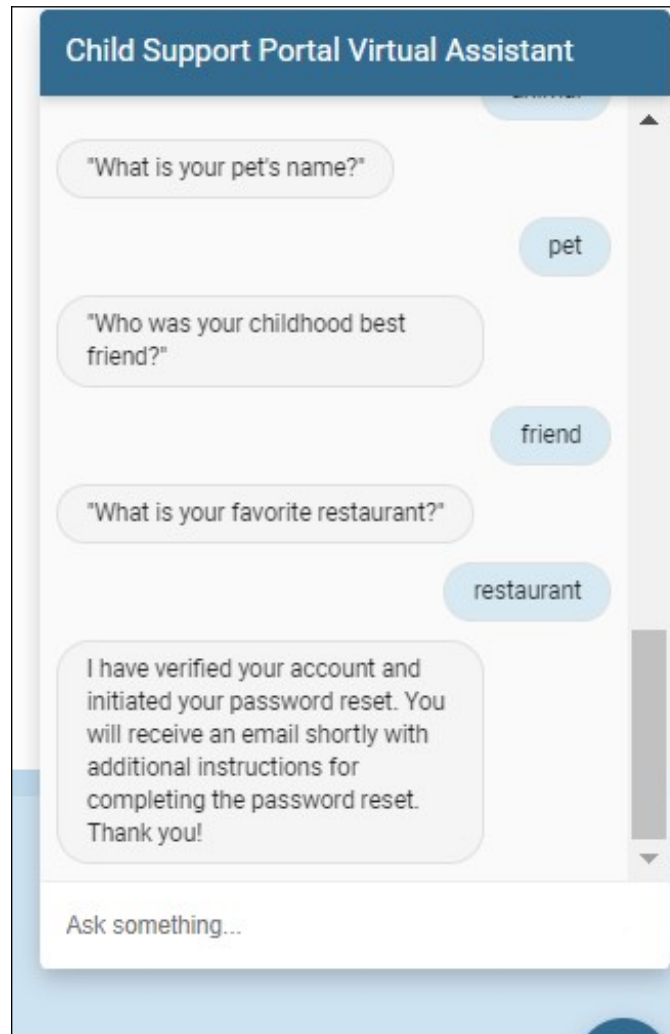
Portal User Page Flow
Version 4.1
Expires: xx/xx/xxxx

Figure 7-45: Portal Virtual Assistant, Password Reset – Challenge Questions 3-4 Correct

If the user answers all five challenge questions correctly or enters their correct date of birth and SSN, the virtual assistant tells them they will receive an email with instructions to reset their password; see Figure 7 -46.

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Portal User Page Flow
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Expires: xx/xx/xxxx

Figure 7-46: Portal Virtual Assistant, Password Reset – User Sent Email to Reset Password

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