

Tax and Revenue Administration Client Self-Service (TRACS)

Login Instructions

Last Modified: February 2007

Table of Contents

I.	Introduction	3
II.	Welcome	3
III.	Register for an EXTERN ID.....	4
	Step 1 – The Privacy Notice.....	5
	Step 2 – Personal Information.....	6
	Step 3 – Contact Information.....	7
	Step 4 – Security Information	8
	Step 5 – User ID Created	9
IV.	Self-Enrolment (Enrol into TRACS).....	10
	Step 1: Select a Ministry Service.....	11
	Step 2: Alberta Finance’s Collection Notice	12
	Step 3: Enrolment Information.....	13
V.	TRACS Homepage.....	14

I. Introduction

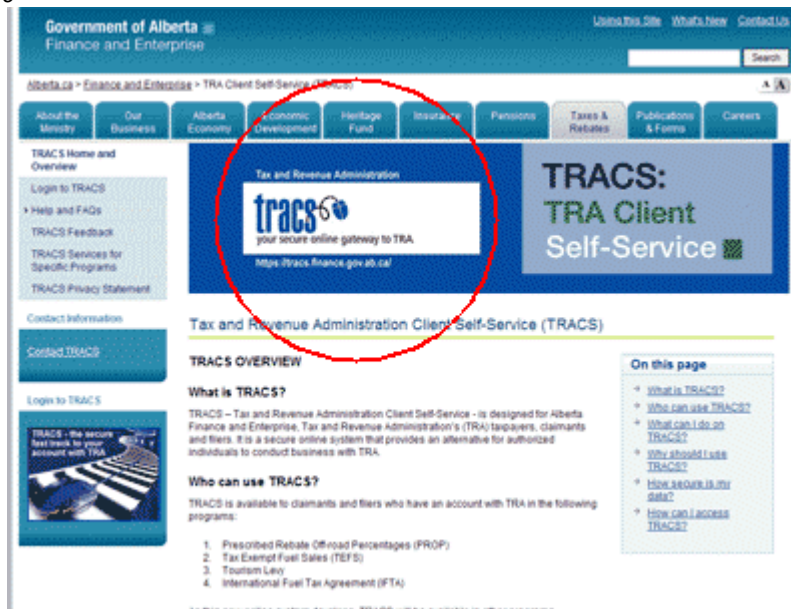
The purpose of this document is to provide easy step-by-step instructions on how to register and enrol into TRACS. This is a one-time occurrence. **After you successfully register and enrol, future visits will only require you to login using your User ID and password.**

Welcome

Welcome to the Tax and Revenue Administration Client Self-Service (TRACS) system. There are two easy ways to access TRACS.

1. Directly enter the website address: <https://tracs.finance.gov.ab.ca>; OR
2. Use the TRACS link on the Alberta Finance website found at www.finance.alberta.ca/tracs (Figure 1.0).

Figure 1.0



From there you have two options:

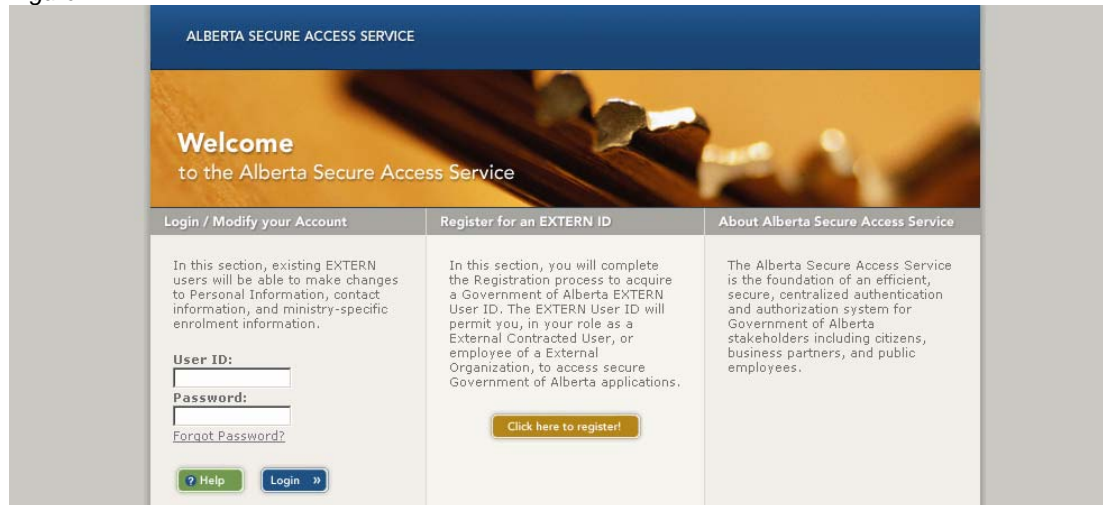
- Option 1. Register for a User ID – first time users to the Alberta Secure Access Service (ASAS). (Pages 4-9).
- Option 2. Enter the TRACS system using your existing ASAS User ID and Password – returning users. (Pages 10-13).

II. Register for an EXTERN ID

To formally introduce yourself to the system you will need to register.

To begin, click on  (Figure 1.1).

Figure 1.1



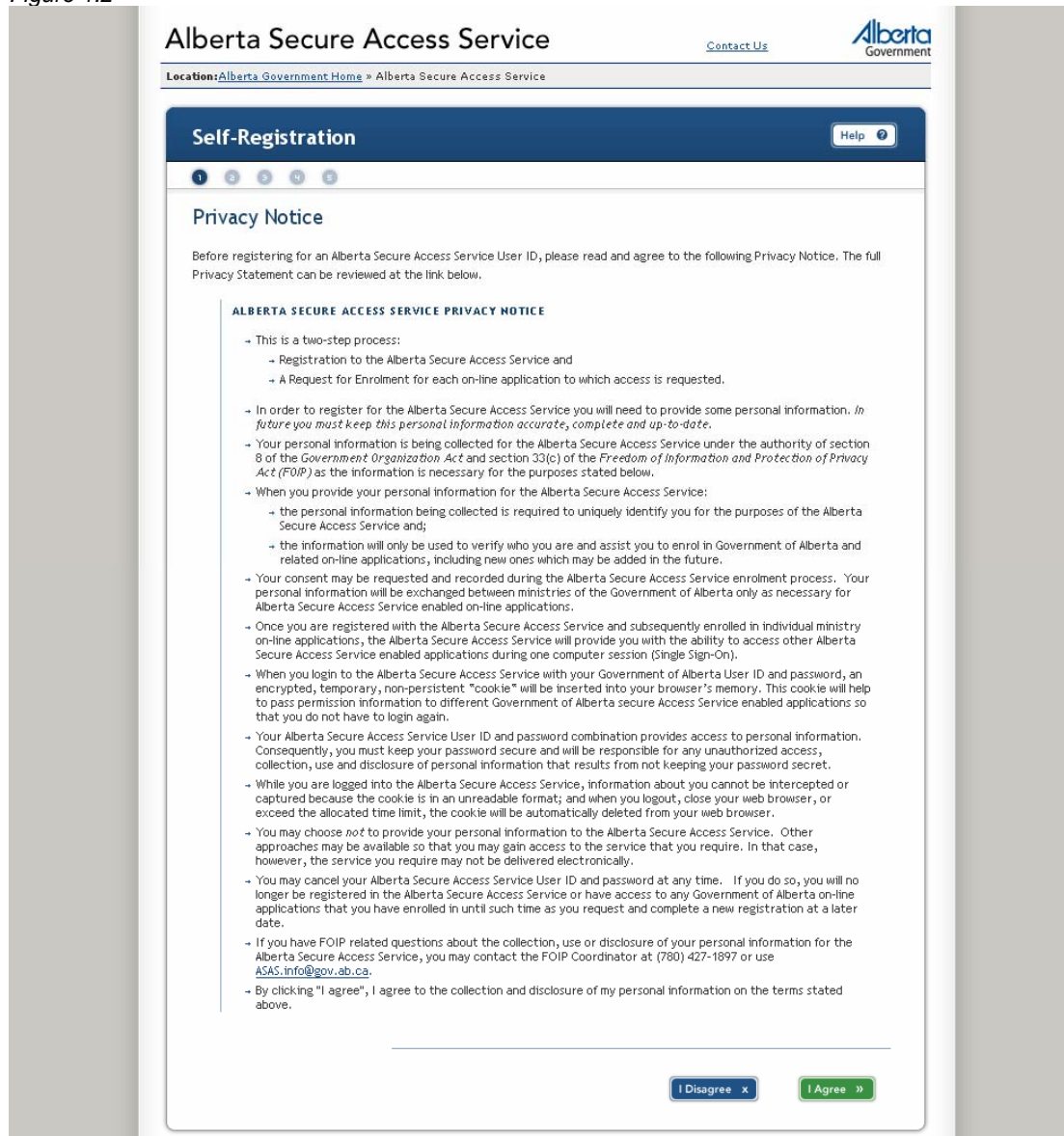
You will need to complete five steps (Pages 5 – 9) to successfully register. At the end of the registration process you will obtain a system generated User ID.

If you require assistance with any of the five registration steps, call the Alberta Secure Access Service at (780) 644-5770 or, if calling long distance within Alberta, dial 310-0000, then enter (780) 644-5770. Alternatively, you may email: asas.help@gov.ab.ca.


Step 1 – The Privacy Notice

The first step in the registration process is to familiarize yourself with the following Privacy Notice.

Figure 1.2



To continue with the registration process, click  (Figure 1.2).

By clicking  (Figure 1.2), you will exit the registration process and be returned to the ASAS homepage (Figure 1.1).

Step 2 – Personal Information


After agreeing to the Privacy Notice, you will then be prompted to enter some personal information. This information will be used to help differentiate you from all other Government of Alberta users.

Figure 1.3

The screenshot shows the 'Self-Registration' page for the Alberta Secure Access Service. The page title is 'Personal Information'. Below the title, there is a brief explanation: 'The Alberta Secure Access Service requires you to provide a minimal amount of personal information to uniquely identify you. Your name will be used to automatically generate an Alberta Secure Access Service User ID for you. Note that all fields marked with an asterisk "*" are mandatory.' To the left of the form fields is a blue 'INSTRUCTIONS:' bar with a warning icon. A red box highlights the text 'Instructional Message...' within this bar. The form fields include: Prefix (dropdown, mandatory), First (given) name (text, mandatory), Preferred name (text), Middle name (text), Surname (text, mandatory), Suffix (dropdown), Gender (dropdown, mandatory), and Date of birth (MM/DD/YYYY, mandatory). A green 'Next >>' button is located at the bottom right of the form.

When inputting your information, be aware that detailed instructions for each field are available under the INSTRUCTIONS bar (Figure 1.3) upon clicking in the input area.

Fields with an asterisk behind it are required to be entered.

Once you have provided this information, click on  (Figure 1.3) to continue.

Step 3 – Contact Information

In step three you will be required to enter your business contact information. Your contact information is collected in the event that you need to be contacted regarding your Alberta Secure Access User ID. If you have more than one business address, please use the contact information where your primary business affairs are conducted.

Figure 1.4

The screenshot shows a web form titled "Self-Registration" with a "Contact Information" section. The form includes a "Help" link and a "Next >>" button. The form fields are as follows:

Field Name	Input Type	Mandatory
Organization	Text	No
Department, Suite Number	Text	No
Street address 1	Text	Yes
Street address 2	Text	No
Municipality	Text	Yes
Province/State	Dropdown	No
Postal/ZIP code	Text	Yes
Country	Dropdown	Yes
Telephone Number	Text	Yes
Telephone extension number	Text	No
Fax number	Text	No
Email address	Text	No

When inputting your information, be aware that detailed instructions for each field are available under the INSTRUCTIONS bar (Figure 1.4) upon clicking in the input area.

Fields with an asterisk behind it are required to be entered.

Once you have provided this information, click  (Figure 1.4) to continue.

Step 4 – Security Information

The next step is to answer questions that will be asked in the event that you need to reset your password. In other words, these questions will be used to verify who you are.

Figure 1.5

Self-Registration Help ?

1 2 3 4 5

Security Information

The Alberta Secure Access Service needs you to provide information that only you know. This information will be required when you access secure functions within the Alberta Secure Access Service or by Help Desk personnel to confirm your identity.

Note that all fields marked with an asterisk "*" are mandatory.

INSTRUCTIONS:

Instructional Message ...

CHALLENGE RESPONSE QUESTIONS:

The purpose of the challenge response questions is to allow you to login in the event you have forgotten your password. You must provide a response to all five questions. Then, when you login, if you have forgotten your password, you will be asked to provide a response to two of these five randomly chosen questions. When you are challenged for your response, you will need to provide your answers precisely as you have entered them below (this includes the case of each letter).

In what city or town were you born?

Who was your best friend while you were growing up?

What was your favourite class or subject in school?

What was your first job?

What is the location of your dream vacation?

PASSWORD:

You create your own password for your Alberta Secure Access Service User ID. Do not share your password with anyone. Your password and the secrecy of it is an integral part of the security protecting your personal information. Your password must conform to the Alberta Secure Access Service password guidelines.

Password

Confirm Password

Next >>

When inputting your information, be aware that detailed instructions for each field are available under the INSTRUCTIONS bar (Figure 1.5) upon clicking in the input area.

After answering the challenge response questions, you will then be required to create your password. There are several rules when choosing a password. The password cannot contain your first and/or last name, must contain at least one number, one upper case letter, one lower case letter and can only be between 8 and 40 characters long.

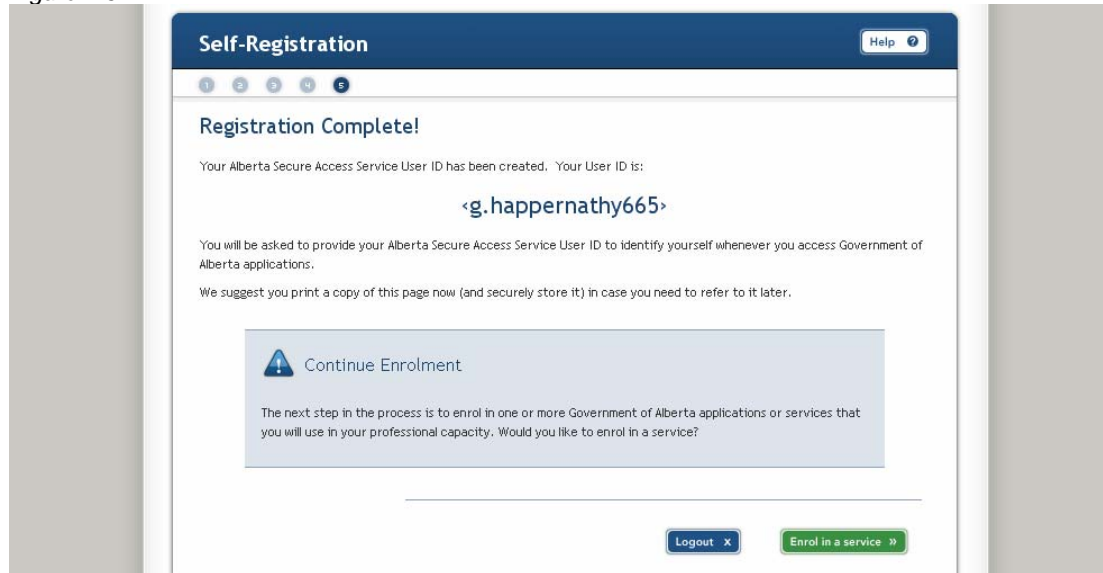
Decide on a password and enter it in twice; once in the Password box and then again in the Confirm Password box and select **Next >>** (Figure 1.5) to continue.

Step 5 – User ID Created

Upon reaching step five, the system will generate your User ID. This User ID along with your chosen password will allow you to access the system in the future.

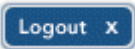
****Note: Print this screen** and store it in a secure place for future reference. The User ID screen is displayed only once.

Figure 1.6



After completing the registration process, you will need to enrol into TRACS. You have the option of enrolling immediately or logging out and enrolling at a later date.

Click on  (Figure 1.6) if you wish to enrol into the TRACS system at this time.

By selecting  (Figure 1.6) you will be not be enrolled into the TRACS system.

To enrol into the TRACS system at a later date, you will need to login to the system using your password (Page 8) and User ID (Page 9) on the ASAS homepage (Figure 1.1) and then commence the self-enrolment process (Page 10).

III. Self-Enrolment (Enrol into TRACS)

The Self-Enrolment process consists of three steps (Pages 11 – 13). Please have your Account Number and PIN easily accessible. You will need them to successfully enrol into TRACS.

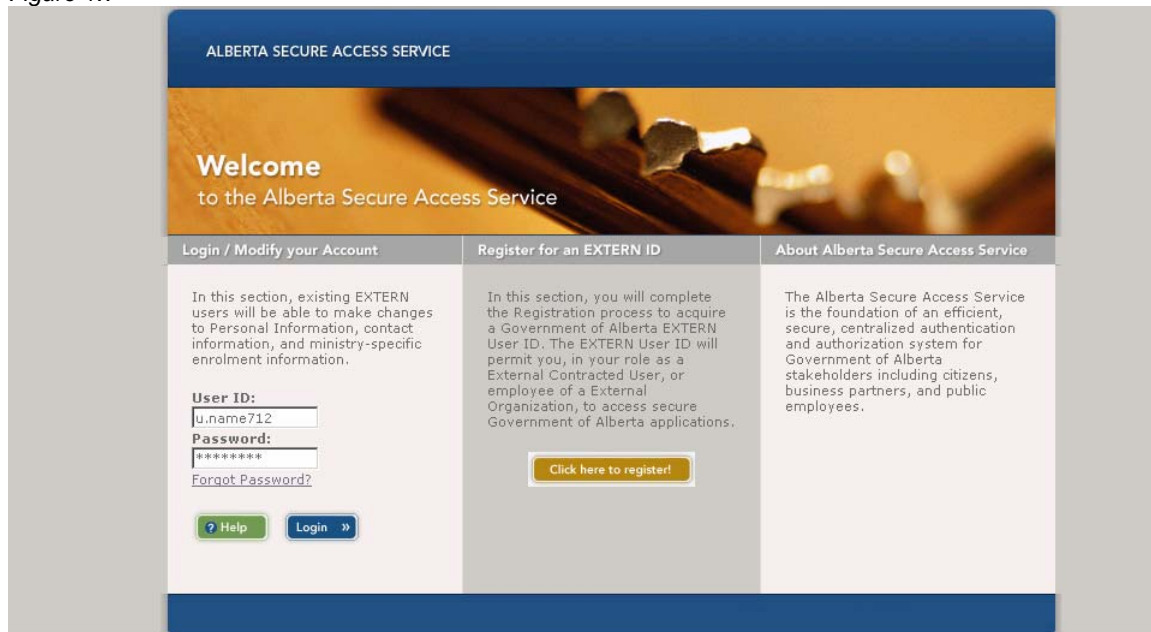
**Note: For detailed instructions on how to find your account number, please visit http://www.finance.gov.ab.ca/tracs/help_account_number.html

*** If you require any assistance with TRACS enrolment, contact Alberta Finance at (780) 427-9424 or, if calling long distance within Alberta, dial 1-888-565-9111. Alternatively, you may email ecomhelpdesk@gov.ab.ca.

If you are proceeding directly from step five of the registration process (Page 9) to the enrolment process, you will automatically be taken to step one in the enrolment process (Page 11).

If you have chosen to enrol into TRACS at a later date, separate from completing the registration process, you will need to login from the ASAS homepage (Figure 1.7).

Figure 1.7



To logon to TRACS, please enter your password (Page 8) and User ID (Page 9) on the ASAS homepage (Figure 1.7).

After entering your login information, press  (Figure 1.7).


Step 1: Select a Ministry Service

This step allows you to pick which Ministry's online system you wish to enrol in.

Figure 1.8

The screenshot shows a web interface titled "Self-Enrolment" with a "Help" button in the top right. Below the title is a progress indicator with steps 1 through 10, where step 1 is highlighted. The main heading is "Select Ministry Service". Below this, there is explanatory text: "The Government of Alberta ministries that are currently enrolling users through the Alberta Secure Access Service are listed below. The applications offered by each ministry are listed under that ministry. The ministry you choose to enrol in may require you to provide a minimal amount of information that will be used to assess, validate and enable your ability to access the requested application." On the left, there is a blue box with a warning icon and the text "INSTRUCTIONS:". The main content area lists three ministry options, each with an "Application" label and a radio button. The first is "Alberta Environment" with "Water Use Reporting (WUR)" selected. The second is "Human Resources & Employment" with "HRE On-line Services" selected. The third is "Alberta Finance" with "Tax and Revenue Administration Client Self-Service (TRACS)" selected, indicated by a red arrow. A green "Next" button with a right-pointing arrow is located at the bottom right of the form.

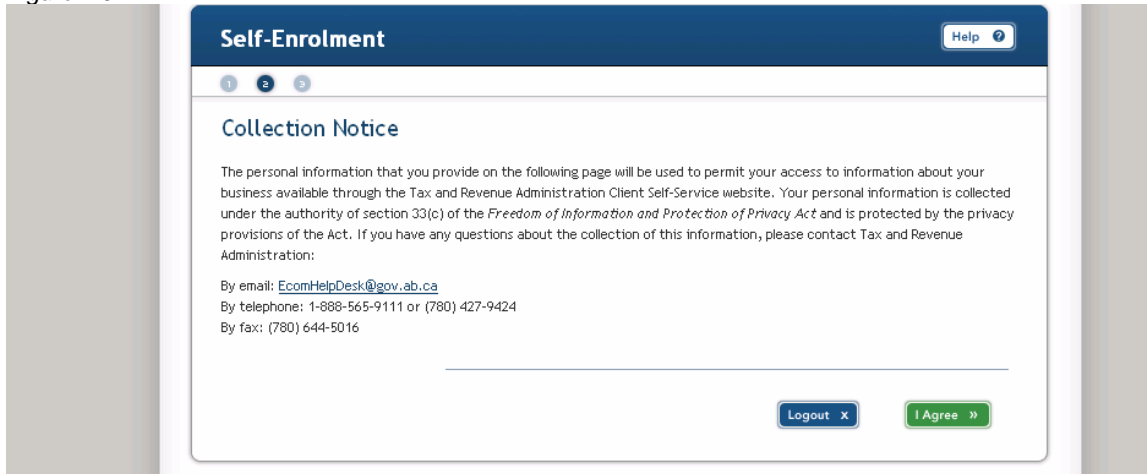
When this form opens, the system automatically defaults to the first Ministry service on the list. To enrol into TRACS, click in the circle beside Tax and Revenue Administration Client Self-Service (TRACS) underneath the Alberta Finance Ministry (Figure 1.8).

Click  (Figure 1.8) to continue.


Step 2: Alberta Finance's Collection Notice

After selecting TRACS, the next step in the enrolment process is to become familiarized with the following Collection Notice.

Figure 1.9



To continue with the enrolment process, click  (Figure 1.9).

Clicking  (Figure 1.9) will exit you from the enrolment process and return you to the ASAS homepage (Figure 1.1).

Step 3: Enrolment Information

The final step in the enrolment process is to provide additional enrolment information that will be used directly by Alberta Tax and Revenue Administration (TRA). It is at this stage where you will need to enter the Account Number and PIN sent to you by either TRA or by a business representative.

****Note: The PIN can only be used once for verification purposes.** For this reason, after the PIN is entered, you must click on Enrol to close the screen. If you close this screen by any other means, your PIN will become invalid and another must be issued. To obtain another PIN, contact the individual or entity that issued your previous PIN.

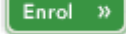
Figure 1.10

The screenshot shows the 'Self-Enrolment' interface. At the top, there's a blue header with 'Self-Enrolment' and a 'Help' icon. Below that, a progress indicator shows steps 1, 2, and 3. The main heading is 'Enrolment Information'. A sub-heading reads 'Alberta Finance - Tax and Revenue Administration Client Self-Service (TRACS)'. A paragraph of instructions follows: 'Please provide the following enrolment information, which will be used by Tax and Revenue Administration. If the pre-filled contact information is not applicable, please type over with the desired information. Note that all fields marked with an asterisk "*" are mandatory.' Below this is an 'INSTRUCTIONS' bar with a warning icon and a red box containing 'Instructional Message ...'. The form fields are: 'First Name' (pre-filled with 'First Name'), 'Surname' (pre-filled with 'Last Name'), 'Account Number' (with an asterisk), 'PIN' (with an asterisk), 'Contact Phone Number (with Area Code)' (with an asterisk), 'Phone Extension Number', 'Email Address' (with an asterisk), and 'Name of Organization' (pre-filled with 'Organization Name'). At the bottom right, there are three buttons: 'Logout', 'Previous', and 'Enrol'.

When inputting your information, be aware that detailed instructions for each field are available under the INSTRUCTIONS bar (Figure 1.10) upon clicking in the input area.

The First Name, Surname, Contact Phone Number, Phone Extension Number and Organization Name are pre-populated with information that you have previously entered. The First Name and Surname are the only fields that cannot be updated on this screen – they can be updated on the Personal Profile screen in TRACS (Figure 1.11).

Fields with an asterisk behind it are required to be entered.

To complete the enrolment process, click  (Figure 1.10).

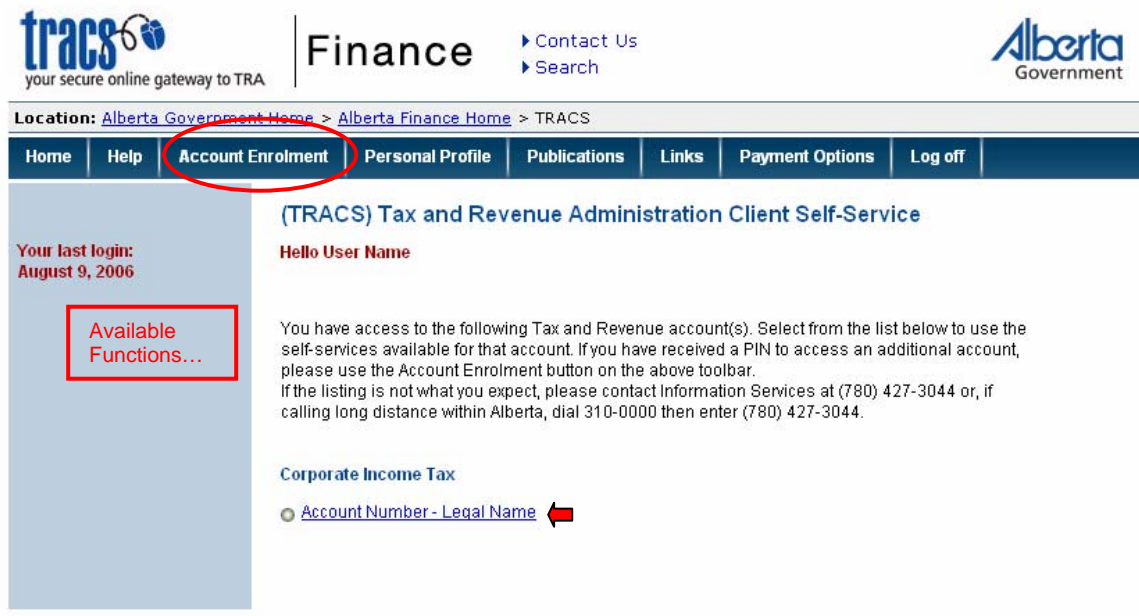
Congratulations, you have successfully enrolled into the TRACS system! You will be taken to the TRACS homepage (Figure 1.11) where you will be able to select the account you have just enrolled in.

IV. TRACS Homepage

You will be brought to the TRACS homepage (Figure 1.11) after you have successfully completed the registration and enrolment processes or after successfully logging in (Figure 1.7).

Once inside the TRACS online system, you will be able to select the account that you wish to access. After the account has been selected, a list of available functions will appear in the left pane.

Figure 1.11



Some individuals may have the ability to enrol in multiple accounts (you will receive the PIN for each account you can access). To enrol into additional accounts, click on 'Account Enrolment' and enter your enrolment information.