

EQUIFAX ACCESS
INSTRUCTIONS FOR SUPERVISORS
Setting up and Cancelling Access and Password Resets
(December 2011)

This guide provides information for Supervisors regarding setting up access for a new user, password resets, and cancelling access to the Equifax database when the user is no longer authorized to perform third-party checks, for example when moved to a new position.

How to Set Up Access

EQUIFAX ACCESS

Adding a New User

1. Sign on to the Equifax system at <https://www.equifax.ca/credit>
2. Enter your client ID, user ID and password, and click **submit**.
3. The Session Information screen will display. Click **continue**.
4. The Service Selection page will display. On the left side, click on **Supervisor User Management**.
5. On the User Management screen, click **Add**.
6. The User Management Add New User screen is displayed.
Complete the following screens:
 - a. User ID (First letter of first name and then first four letters of last name, e.g. JWILS for John Wilson)
 - b. Password (you assign the password)
 - c. First and last names and email address of new user
 - d. Language – **English**
 - e. Email Notification – select **Yes**
 - f. User type – select **Operator** (this is the only option)
 - g. Check the Address Verification and Report boxes (check both) under Consumer Services
 - h. Under Consumer Billing Codes, locate and select the correct office
 - i. **Do not** check anything under “IT Packaging”
7. Click on **Add** at the bottom of the page.

Notify User

1. Notify the new user by email of their user ID and password.
2. Copy and paste the information from page 2 of this document into the email
3. Instruct them to follow the instructions as listed.
4. The supervisor’s role in new set-up is complete.

Reset Passwords and Modifying the User Information (Office changes, cancel access)

1. Passwords do not expire. Supervisors have access to conduct password changes and modify the user profile, including cancelling access.
2. Follow steps 1-4 under **Adding a New User**, above.
3. On the User Management screen, select the user and click **Modify**.
4. Make changes (password, profile update, office change, etc); and click **Save**. Screen will display “Changes Saved” message.

Information to include in email to new users:

Instructions: Copy and paste the information below into the email you send to the new user. Update details (information in italics) for their Client ID, User ID, and Password.

Hello: You have been set up with internet access to Equifax credit reports. Please see below your Equifax Sign-on instructions, as well as instructions on how to enrol for a digital certificate.

Your Client ID is: *[enter their client ID]*

Your User ID is *[enter their User ID]*

Your Password is *[enter their password]*

To enrol for your Digital Certificate:

1. Go to the following link: <https://canadaca.geotrust.com>
2. The Welcome page will display. Click on Continue.
3. Read the Digital Subscriber Agreement. When completed, click on **Accept**.
4. The Digital Enrolment form will display. Read and follow the three steps to enrolling for a digital certificate. Complete Step 1 (fill out online form) and Step 2 (email cast.ca@equifax.com) immediately. The subject line for the email to cast.ca should say "Digital Certificate".
 - a. NOTE: If Steps 1 and 2 are not completed within 3 working days, the request will be cancelled and it will be necessary to start over at Step 1.
5. Once you have received an email from Equifax, click on the link it contains to download your digital certificate.
6. Click on Import Certificate.
7. For Internet Explorer only – Click **Yes** when asked "Do you want to add this certificate to the root store?"
8. If your certificate was successfully imported, click on **OK**.
9. Click on **Register Your Certificate**
10. Authentication will come up: "This is your certificate". Click on **OK**.
11. Fill out all the information on the registration form and then click on **Submit**.
12. The Equifax sign on page will appear: <https://www.Equifax.ca/credit> . (The sign-on page can be bookmarked by pressing Control-D on your keyboard)
13. Select the digital certificate and click **OK**.
14. Log in to the Equifax system using the Client ID, User ID, and password provided above.

If you require any assistance with this process please feel free to contact me or your trainer. You can reach Equifax by telephone at 1-877-257-2090 and by email at cast.ca@equifax.com.

To access User Manuals: <https://equifax.ca/documentation>

Equifax sign on page: <https://www.equifax.ca/credit>