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# Participant's Guide

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# GETTING TO KNOW US

Induction and Common			
Day One			
Time	Topic	Facilitator	
9:00 - 09:45	Welcome & Ice Breaker Aim: Get new inductees comfortable and relaxed in their new environment (includes walk around)	Facilitator with HR Representative	
09:45 - 10:15	Meet the Managers Aim: Provide an opportunity for inductees to meet with senior management and gain a better understanding of the DTMR organisational structure.	Managers	
10:15 - 10:30	Meet the Team Leaders	Team Leaders	
10:30 - 10:45	Break		
10:45 - 11:45	Human Resources Induction and Evacuation Aim: Brief new staff on their role and responsibilities in the workplace.	Human Resource Personnel	
11:45 - 12:00	Meet the Union Representatives. Aim: Give staff the opportunity to provide feedback, on key issues to be included in the EBA negotiations.	Union Representative	
12:00 - 12:30	Overview of Role for consultants,  Aim: Give staff an understanding of access to customers' records and DTMR expectations.	Facilitator-Power Point	
12:30 - 1:15	Lunch		
1:15 - 1:30	Overview of Role for consultants and WFP. Aim: Give staff an understanding of expectations of DTMR.	Facilitator, WFP	
1:30 - 3:00	System Set-up Aim: Get staff fully operational Set up: IBM Notes, Work Space, Corporate forms, Business Directory, Knowledge and Operational Support Site, Email Signature, DMS V8,TICA, TRAILS, Dispark Archive Inbox, Service Centre, Learn Zone, IA/IL Tracker, Business Directory, Sap, Stars, Printer, Online Reset Access, RUMIIS, CSD Portal. Aim: Familiarise staff with email system and databases. Complete mandatory courses on Learn zone. • ICT facilities & devices • Recordkeeping 101 • Which way would you go • CSB Staff responsibilities. • Tica Basics	Facilitator	
3:00 - 3:45	Break		
3:45 - 4:45	Buddy	Facilitator to arrange	
4:45 - 5:00	Buddy Debrief. Aim: Allow staff the opportunity to vies and familiarise themselves with all the systems they will be using, in this module.	Facilitator	

# **Human Resources Overview**

What do these abbreviations stand for?		
Public service classifications		
AO =	-	
PO =		
TO =		
00 =	-	
What are the main duties of your role?		
Dress standards		~
Circle which it	ems of clothing would be acceptable	

# **Code of Conduct** When and where does the Code of Conduct apply? Who should you report potential breaches of the code to? What is Workplace Discrimination? What is Workplace Harassment? **DON'T FORGE**

# **Workplace Health & Safety**

What is STOP — THINK — GO?	
STOP	
What are the steps that I take if I am injured in the workplace?  GO  GO	
DON'T FORGET TO CHECK KAOS  NEXT EXIT	

# **Overview of Role**

CSD Shift times		
Unplanned Leave		
Contact Number if you are running late or are unable to attend work		
The second secon		
Information that will be required:		men
	The state of the s	

dherence	≀ Ind	dicators (KPI's)	
uncremee		0 3	
all Quality			
lot Ready count			
AOS Usage			
NOS OSUBE			
old Time			
	val	luation Scorecard	CG
Consultant Call Monitoring Coach	$\vdash$	SD Team Number	
Date of Evaluation	5/4/2		
Evaluation Month Call Recording #	Recor	Call Duration (MM:SS)  Evaluation Coaching Plan	ate
Customer Name			
CRN / Rego / BRN		Total Score	
Category		Criteria	Result
Welcome your Customer		Did you use an appropriate greeting, did you provide your name and answer the call in a timely manner?	
Identify your Customer Know your Customer	Q02 Q03	Was your customer identified appropriately by the information provided to them? (This includes using the EOI Checklist Did you confirm your customers question query?	1
iaioti your oosioiiioi	Q04	Did you use effective and appropriate questioning?	$\vdash$
Customer Experience	Q05	Did you actively listen to your custabler?	
	Q06 Q07	Did you create a great costomer experience for this customer?	-
	Q08	Did you demonstrate appropriate behaviour on the call?  Did you use appropriate language and behaviour?	┢
	Q09	Did you control the call effectively? (No long pauses, excessive hold, stopped the customer from providing excessive information?)	
	Q10	Did you transfe@eekassistance from a supervisor when appropriate?	-
Transfers & Hold	QIU	Did you transfer/seek-assistance from a supervisor when appropriates	
	QII	Did you use the conject hold/transfer process?	
	Q11 Q12	Did you use the Conject hold/transfer process?  Accurate (namplation	
	QII	Did you use the Conject hold/transfer process?  Accurate (hold/spiion  Complete Information	
	Q11 Q12 Q13	Did you use the Conject hold/transfer process?  Accurate (namplation	
Accuracy of Information	Q11 Q12 Q13 Q14 Q15 Q16	Did you use the conject hold/transfer process?  Accurate (hold/fight) in Complete Intermation  Approximation  Approximation Tica, SBS & other databases/emails  Confirm with the customer that you have answered their question and resolved the call.	
Transfers & Hold  Accuracy of Information  Call Close	Q11 Q12 Q13 Q14 Q15	Did you use the conject hold/transfer process?  Accurate (holf) pation  Complete Intermation  Appropriate data entry - TICA, SBS & other databases/emails	

#### **Rosters & Timesheets**

Your Roster is located in Knowledge and Operational Support Site, which has the acronym of KAOS.

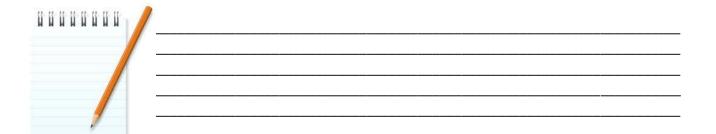
Click on this link: <a href="http://share.qdot.qld.gov.au/sites/csdkaos/default.aspx">http://share.qdot.qld.gov.au/sites/csdkaos/default.aspx</a>

Hover your cursor over Business Services → All reports → CSD Empower → Schedule Editor. Click on the Right Arrow to view your roster in advance.

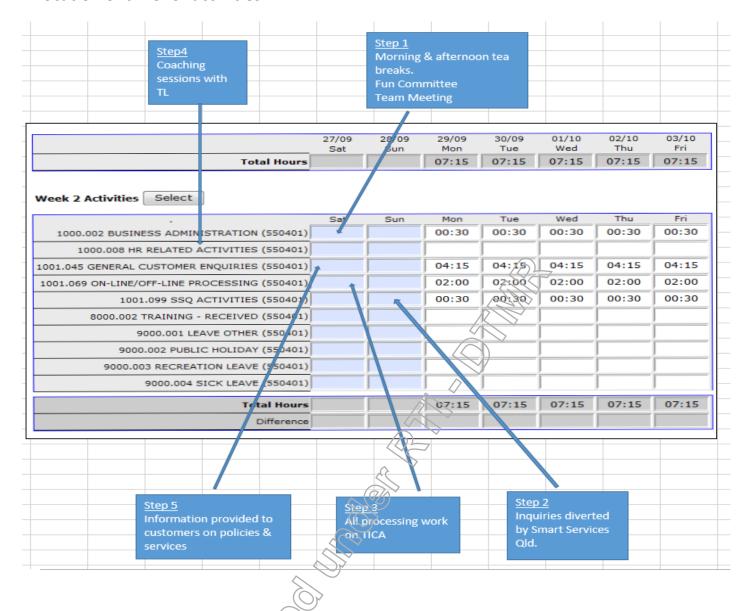
Check your Daily Breaks on commencing your shift. If there are changes, there will be an updated version of daily breaks in the above link, besides an email from the Real Time Analyst.

If you are late for your breaks, or finish your shift after your scheduled time, you add or modify your schedule through the same link.

#### **Completing your Timesheet** 29/09 30/09 01/10 02/10 03/10 04/10 05/10 Sat Sun T)ue Wed Thu Start 0/7:55 08:35 07:55 07:55 Finish 12:00 12:00 12:00 Before Lunch Finish Hours Worked 04:05 03:25 04:05 04:05 Start 12:45 12:45 12:45 12:45 Finish 16:55 16:55 16:55 16:55 After Lunch Start Finish 04:10 04:10 04:10 Hours Worked 04:10 08:15 08:15 Total Core Hours 07:35 08:15 Leave/Public Holiday 07:15 07:15 Standard Hours 07:15 07:15 07:15 07:15 Accrued Hours 10:20 10:40 11:40 ADO/RDO/HD Outside Hours Worked **Total Hours** 08:15 07:35 08:15 Week 2 Activities **Total Hours**

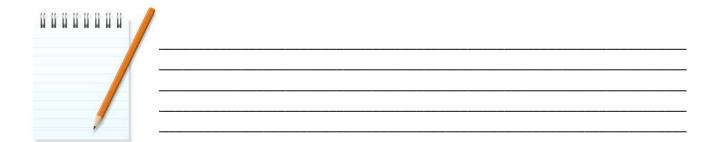


#### Allocation of time for activities



# If you work 5 hours per day, the following will be the allocation of time:

- Business Administration 10/15 minutes.
- SSQ activities 00.30 minutes.
- On-Line/off-line activities- 00.30 minutes.
- General customer Enquiries-the remaining of the 5 hours



Buddying
How did the consultant open the call?
How did the consultant close the call?
THOW WELL CITE SOUSMECHING SIDES CHE SHELL!
What types of calls did you hear?
What was something new that you learnt?



Module Two - Common Skills Timetable		
Day Two		
Time	Topic	Facilitator
8:00 - 8:30	Welcome & Ice Breaker Aim: Get new inductees comfortable and relaxed in their new environment (includes walk around)	Facilitator
8:30 - 09:30	Standard EOI and Types of Customers Aim: To provide insight into the quality requirements when providing information to customers, covers EOI, Types of Customers, Acceptable variations and Change of Customer Details	Facilitator
09:30 - 09:45	Break	
09:45 - 10:15	Standard EOI and Types of Customers Continues Aim: Covering EOI, Types of Customers, Acceptable variations and Change of Customer Details	Facilitator
10:15 - 11:30	Introduction to TICA Aim: To introduce TICA and provide an overview and understanding of the Individual Hub, Organisational Hub	Facilitator
11:30 - 12:15	Lunch	
12:15 -2:30	Maintaining TICA (Change of Details), Aim: To provide an understanding of the how to perform maintenance in TICA pertaining to amending a postal address, checking for correspondence and confirming a disability parking address.	Facilitator
2:30 - 2:45	Break (7)	
2:45 - 3:00	Maintaining TICA (Registration)  demonstrate how to identify the current registration details  & replace needed paperwork, to replace a label or certificate	Facilitator
3:00 -3:10	Review Aim: Review and refresh key learning	Facilitator
3:10 -3:50	Buddying Aim: Provide staff with context to the role	Facilitator to arrange
3:50 - 4:00	Buddying Debrief Aim: Get staff talking about calls they heard. Encourage dialogue and answer questions that may arise. Help develop understanding.	Facilitator

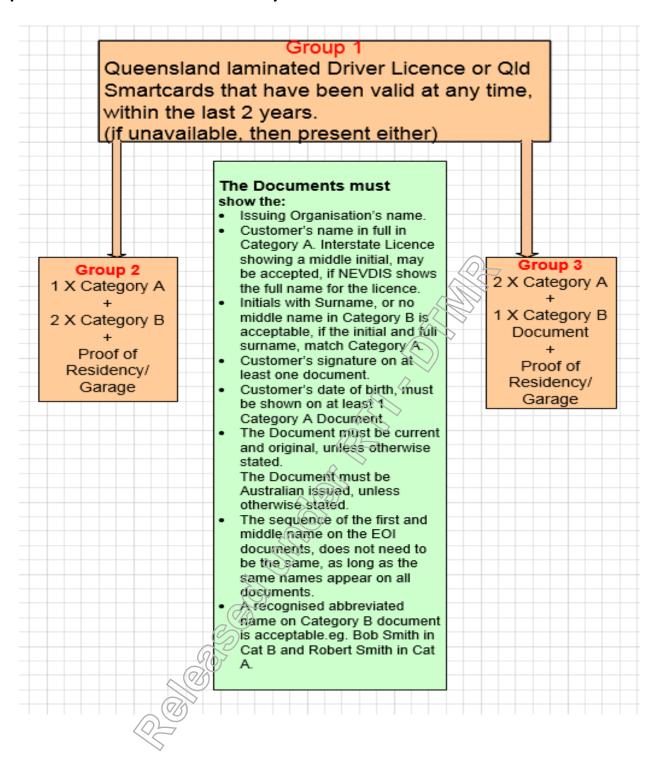
# Evidence of Identity in Licensing and Registration

# **Types of Customers**

A customer is any individual/organisation, which does business with the Department of Transport and Main Roads and has a Customer Reference Number (CRN). Customers are created in TRAILS or TICA, separate to any products. Products such as registration and licences are then linked to the customer.

Vhat application form r	nust be lodged by a <b>new</b> customer, to register a vehicle? (Include Form Num
lame the two reasons	when a new customer must complete a New Customer Application form?
	when a new customer must complete a New Customer Application form:
vidence of Identity	
Vhat does EOI prove?	
Individuals	
1.	
2.	
3.	
Organisations	
1.	
/=	

## **Groups of Standard Evidence of Identity for Individuals.**





What are the consequences for not adhering to phone EOI processes?

Provide three examples of Category A Documents?

Provide three examples of Category B Documents?

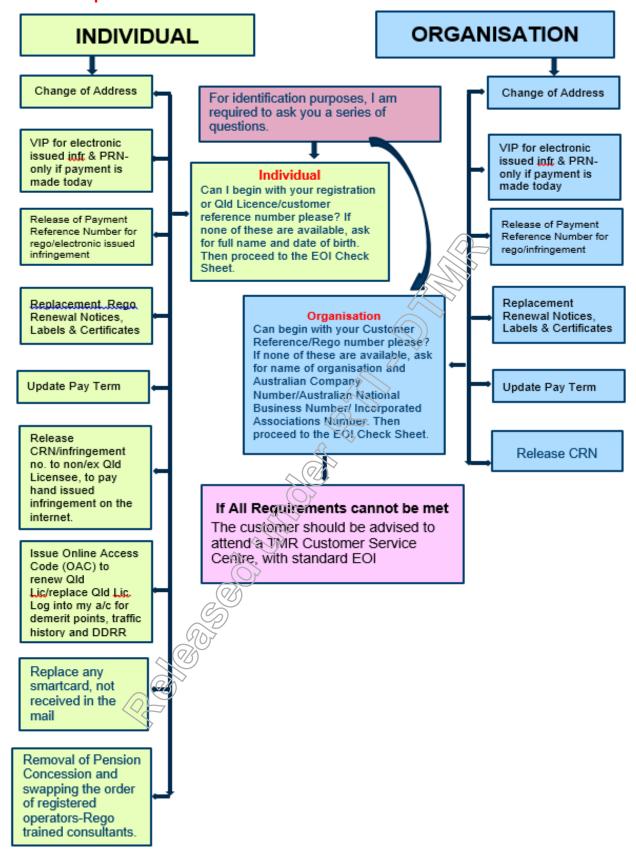
What questions do you need to ask an individual and an organisation over the phone?

What process do you need to follow, if they cannot complete the identification check?

hat do you do, if a	ustomer cannot meet standard Phone EOI?	
1.		
2.		
/hat are the 6 comp OI Check sheet?	ulsory 1 <sup>st</sup> level responses, which you must ob	tain from a Qld Licensee, for the pho
/hen can certified co	pies of documents be presented?	
		>
Vhat are the 6 comp OI Check Sheet?	ulsory 1 <sup>st</sup> level responses, which you must ob	tain from an organisation, for the ph
	907	
	<b>*</b>	

Acceptable Variations to Evidence of Identity Documents

## **Identification Requirements for Phone Transactions**



# **Change of Customer Details**

Under certain circumstances, some of the customer's personal details can be changed in TRAILS and TICA. Investigate below, what details can be changed and what proof is required to perform these changes.

Can the following details be changed for a customer?	Yes or No	What Proof is required?
Date of Birth		
Sex & Name		
Name		
Driver Licence number		
Address		
Place of Birth		
Deceased		

It is really important that you correctly identify your customers. In fact, it is deemed a critical error if you fail to do this and you will score a zero in Call Quality!



# **Evidence of Identity & Change Customer Detail Quiz**

My Registration Renewal Notice was redirected to me. I would like to change my address for the registration. What other questions must you ask, if the customer could only provide you with her Queensland Licence number before you could change her address.						
I have just turned 18 and want to get an Adult Proof of Age Card. The only ID I have in my name, is an expired high school ID, and my EFTPOS card. What ID do I need to get the Card?						
A customer has called the Call Centre and wants to discuss his registration details. He is unable to be authenticated on Level 1 of the Check Sheet and therefore has failed the ID check. What can we do to assist this customer? (List all options).						
I have just moved to Queensland and will be registering my car in Queensland. I only have a photocopy of my birth certificate. Is it OK to use this?						
5. A customer is going in to set up a CRN for the company. What documentation and form number, are required for the customer to do this?						

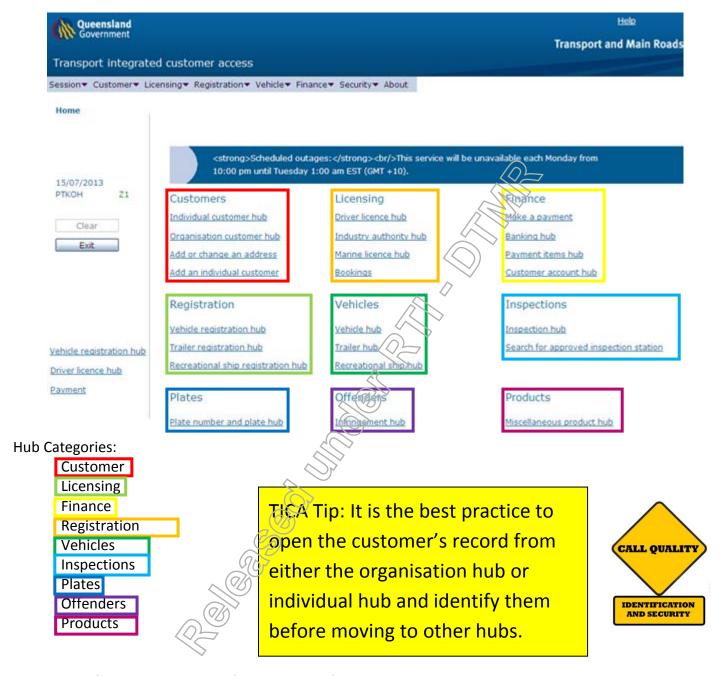
	6. List three Category A Documents
1.	
2.	
3.	
	7. List three Category B Documents
1.	
2.	
3.	
Ch	ange Customer Detail Quiz
1.	What options does a customer have, to change their address with DTMR?
2.	How soon, should a customer advise TMR of any changes to the address?
3	Who can have a Queensland Licence but can request for a change of address to an interstate residentia address?
	audiess!
4	I lost my purse with my Qld. licence in it. I am worried that someone will use my licence to open bank accounts. Can I get a new customer number, when I come in to get my licence replaced?

)	I have just got married overseas. What do I need to bring in, to change my name from my maiden nam
	to my married name?
_	
	My company has changed its name, but my ACN is remaining the same. What do I need to do to get the
	name changed?
_	
_	
	I have recently divorced my husband and am reverting to my maiden name. As I have previously had
	Qld licence in my maiden name, can I come into DTMR and have this changed without providing the
	divorce papers?
_	sino so paperon
	<u>O</u> v
ŀ	low would you change the address of a large company, which has a fleet of vehicles? Only two vehicles
a	ve to be moved to another Garage Address.
	$\mathcal{O}(0)^7$
١.	Vould changing the address of the proprietor for a business, automatically change the address for a
9	nicle?
_	
	<u> </u>
ü	

# Transport Integrated Customer Access (TICA)

TICA is a system which allows DTMR to view, retrieve and maintain customer records.

From the Homepage you can click on any of the links, which will connect you to that hub.



Once in a Hub, you can return to the Home page by:

- Clicking on Home, which is located in the top right of the title bar of every page; or
- Clicking on the **Exit** button (located on the left side of every page) until you reach the home page.

You can also navigate between the different Hubs from any page, by selecting the drop down box for links (located across the top in the menu bar), and then the appropriate hub you require.

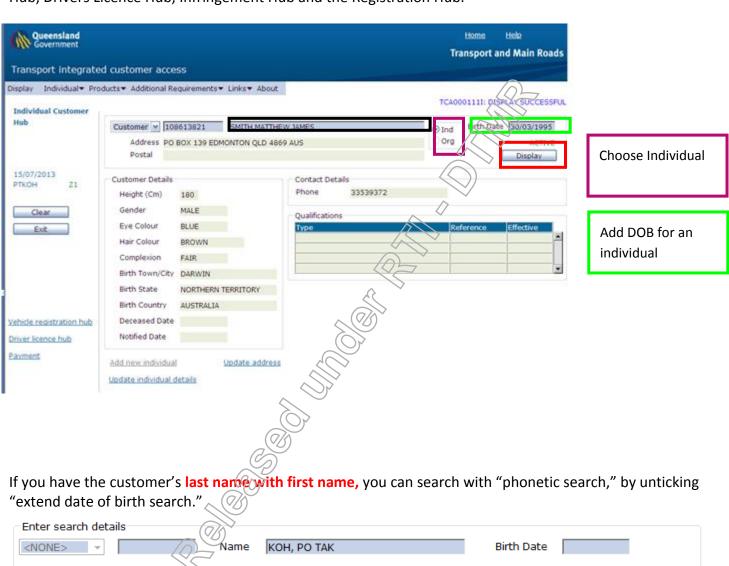
Searching for individuals and organisations, should be done before any of the change processes. You cannot change anything until you've identified your customer with the Check Sheet.

#### Search for an Individual

After displaying an individual in TICA, the EOI check can be completed on this page.

The customer can be displayed from all different hubs.

The most common hubs you will search for a customer, include the Individual Customer Hub, Organisation Hub, Drivers Licence Hub, Infringement Hub and the Registration Hub.





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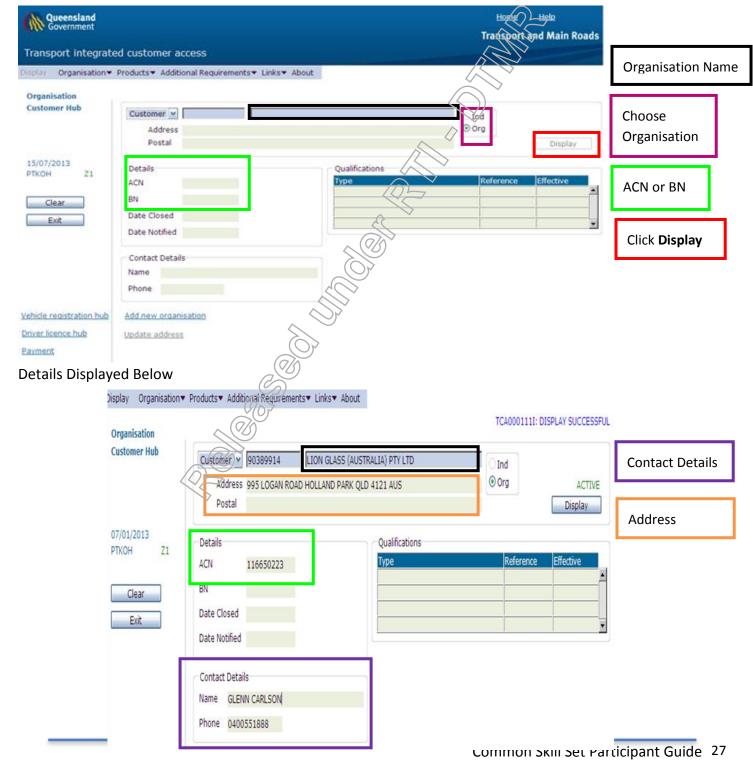
#### **Search for an Organisation**

To perform an EOI check for an organisation, you will need to go to the Organisation Customer Hub.

The Organisation Customer Hub can be accessed from the home page, or any page by selecting the drop down box from links (located across the top in the menu bar)

In the Organisation Customer Hub, you will be able to see the organisation's full name, address and ACN or BN. To update the phone number for an organisation, you must select "ORGANISATION DETAILS," and update the phone number on this hub.

Once the EOI has been conducted with the Check Sheet, use the links function to navigate to the Hub that best suites the customer's enquiry.



## **Change Customer Address**

In TICA you can update, add or remove a Residential, Postal or Garage Address for both Individual and Organisational Customers.

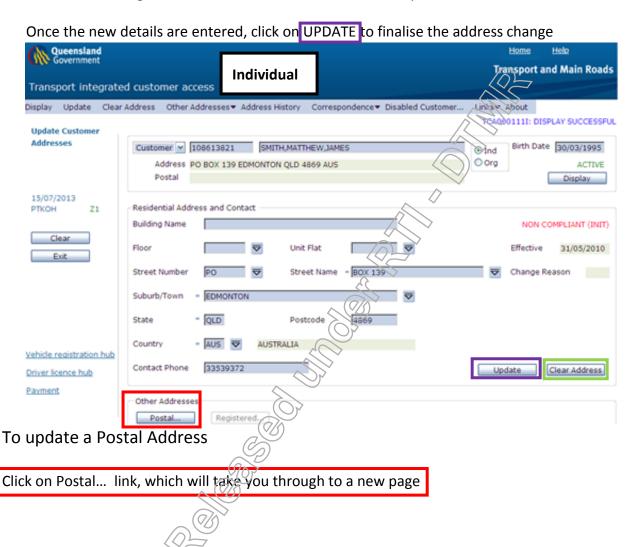
# To update a Residential Address or Telephone number

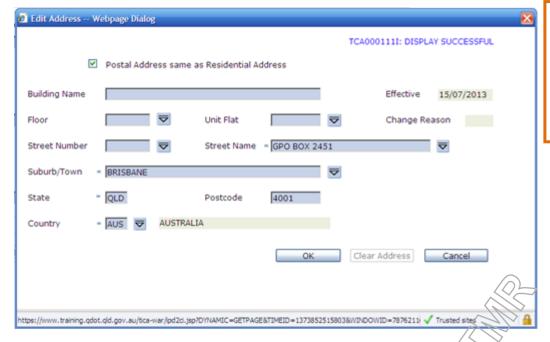
Type over the previous address details

OR

Press CLEAR Address and type in the new details

Note: Pressing CLEAR deletes both the address and the phone number.





If the Postal address is the same as the residential address, select the box, Postal Address same as **Residential Address** 

For a separate PO Box address, add details

Press **OK** 

# **Unsuccessful Updates**

If your update was unsuccessful, begin by problem solving with client. Commence by reconfirming the client's postcode, suburb, street and building number. Try to think outside the square to ascertain the issue. Could it be an issue that, the actual residential address is different from the Australia post address file (PAF)? Could the wrong street name being picked? Could this be a new house on that street?

Note: The address **must** have at least a street name. **Suburbs** cannot be overridden.

If TICA highlights that the update cannot be processed and an 'override' is required, you must ensure that, all options have been explored, before you click on "Override."



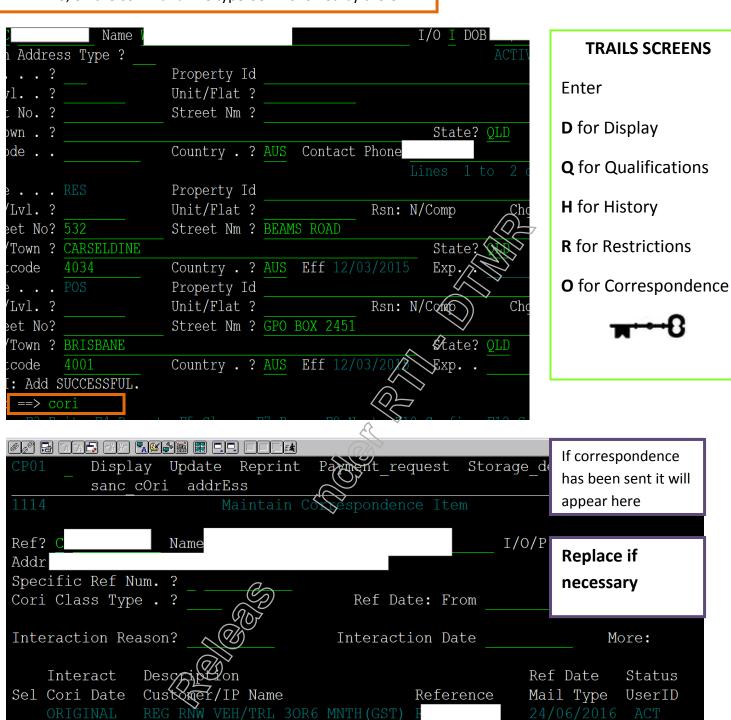
/					

# To update an Organisation Address or Telephone number

Press Update Address, type in the new details and click Update. To update the phone number for an organisation, you must select "ORGANISATION → UPDATE ORGANISATION DETAILS," and update the phone number on this hub.

Queensland Government	Org	Home Helo Transport and Main Roads		
ansport integrate	d customer access	anisation		
play Organisation▼	Products▼ Additional Requirements▼ Links▼ Ab	out	1 - CONTRACTOR CONTRACTOR	
Organisation Customer Hub	Customer   106096785   BLUEBIRD AN Address 32 EVAN STREET EAST MACKAY C	TCA0001111: DISPLAY SUCCESSFUL  Ond  Org  ACTIVE  Display		
15/07/2013 PTKOH Z1 Clear Exit	Details ACN 555550822 BN Date Closed Date Notified	Qualifications Type	Confedence Effects	
hide registration hub	Contact Details  Name MICHAEL GILLESPIE  Phone  Add new organisation			
ver licence hub	<u>Update address</u>	A S		

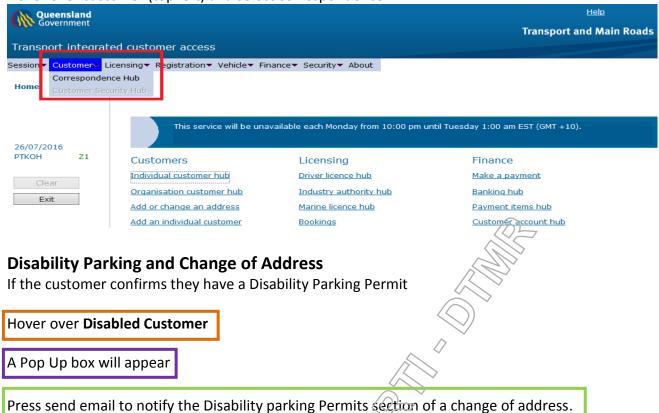
In TRAILS, on the command line type CORI followed by the CRN



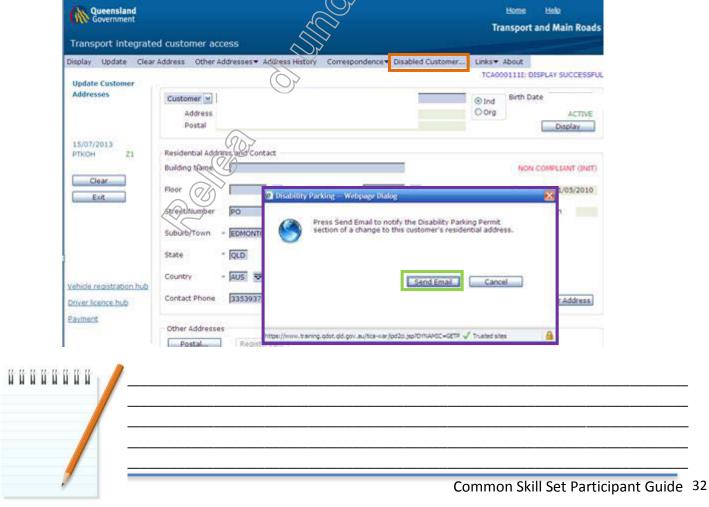
# **Checking Correspondence in TICA**

From any HUB in TICA, click HOME

Hover over customer (top left) and select correspondence



Determine if the caller has a laminated licence & if one exists, a change of address label must be issued

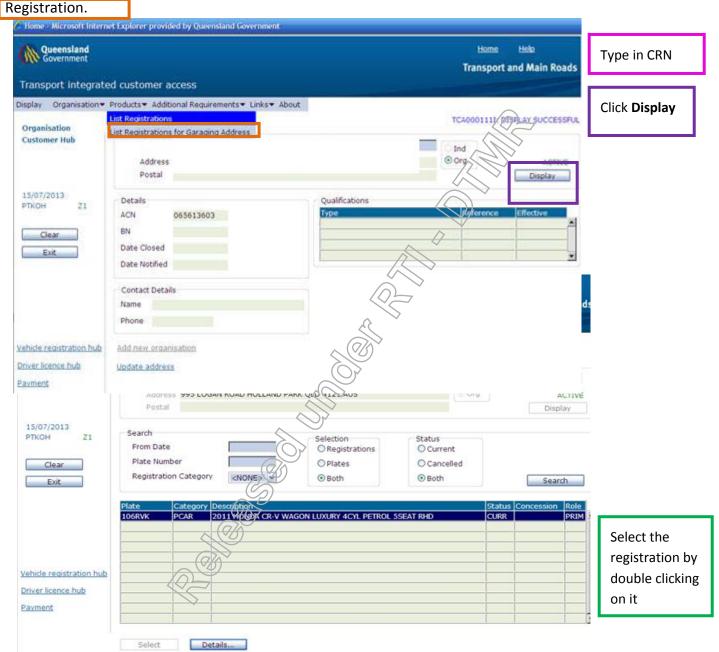


# **Checking for a List of Registrations**

When a customer has multiple registrations, you can view a list of the registrations in a customer's name from the Registration Hub.

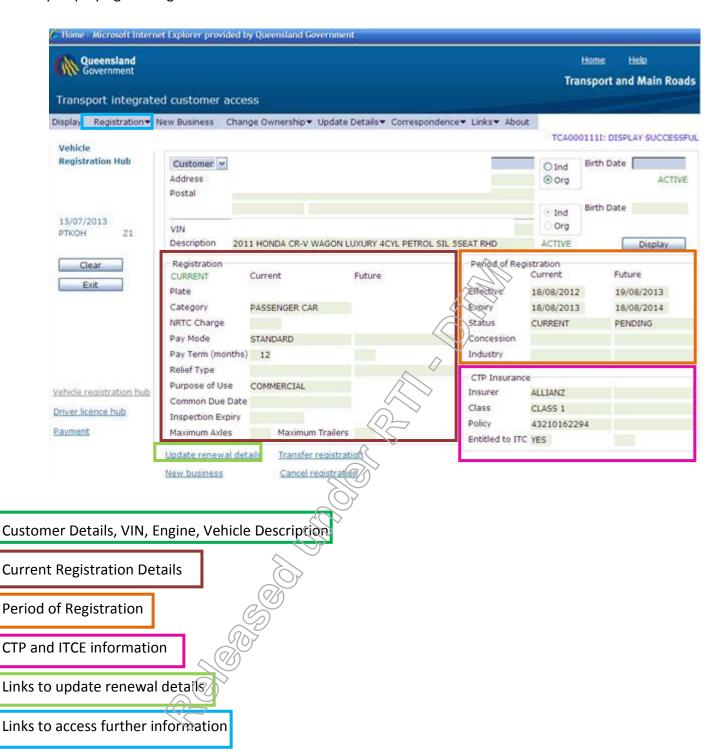
Note: After listing registration and if payment of registration is required, proceed with the following steps, if the vehicle is a non inspectable vehicle.

Hover your mouse over the Registration in the top title bar. Once the down menu has displayed, click on List



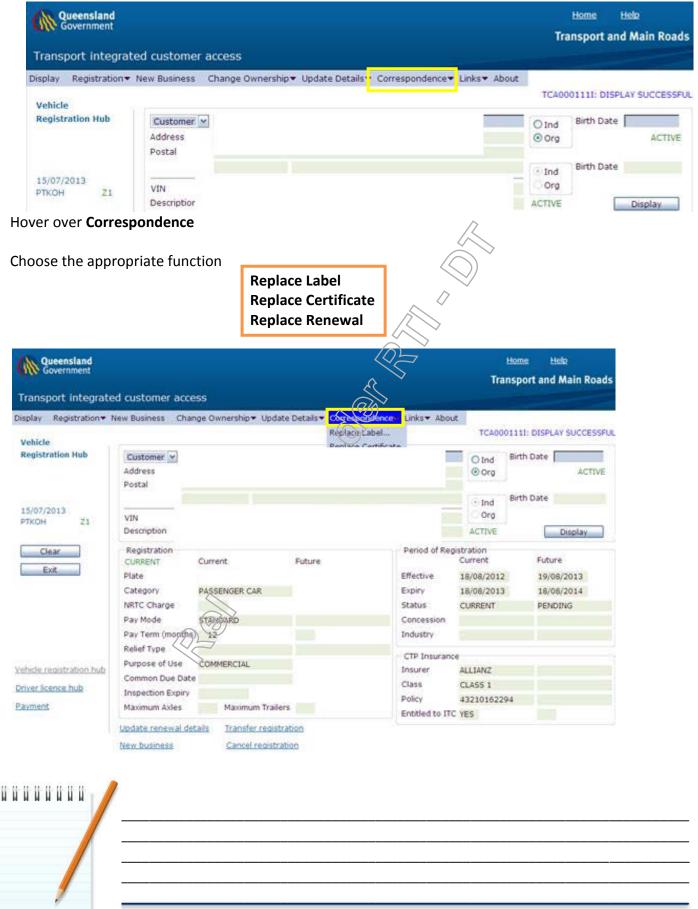
# **Identifying Registration Details**

Start by displaying the Registration Hub.



# Replace a Label, Certificate for labelled vehicle, Label for Vessel and Renewal Notice for **Vehicle or Vessel Registrations**

From the Vehicle Registration hub



## **Replacing a Label**

Choose Replace Label when a customer requires their registration label to be replaced.

If you choose the Replace Label option, a new Pop-Up window will appear

You will be required to provide a reason for resending the label

Choose the most appropriate answer from the dropdown menu

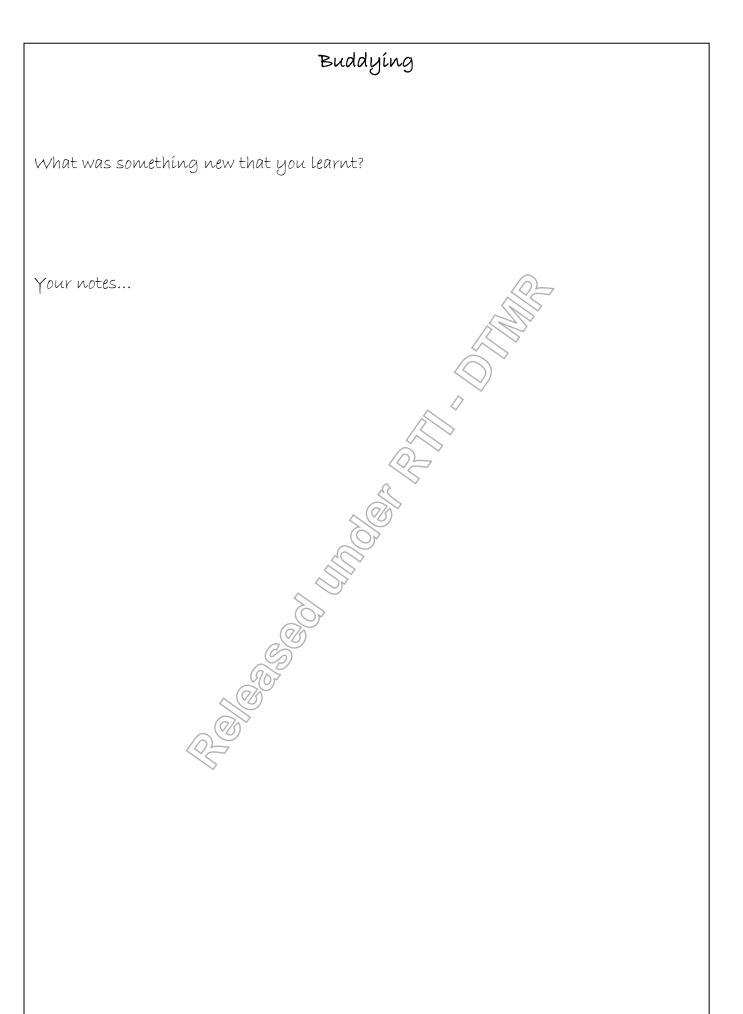


Click on OK

Can a third party request a replacement label?

Registered Operator/s or their representatives can order replacements.

If a representative is requesting the replacement to be posted to the registered operator's address, no EOI is required.





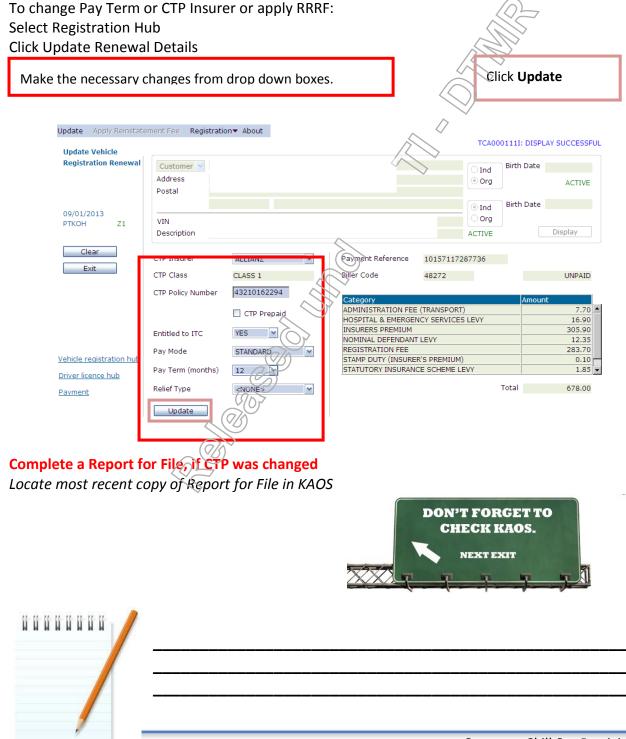
Module Five - Common Skills Timetable				
Day Three				
Time	Time Topic			
8:00 -8:30	Welcome & Ice Breaker Aim: Get new inductees comfortable and relaxed in their new environment (includes walk around)	Facilitator		
8:30 - 9:30	CTP, ITCE and RRRF Aim: To demonstrate how to change Pay Term to CTP Insurer or apply RRRF as well as providing a PRN	Facilitator		
9:30 - 9:45	Break			
9:45 - 10:15	Infringements Aim: To provide practice at searching for an infringement as well as applying VIP and providing PRN for Traffic Camera infringements	Facilitator		
10:15 - 11:30	Other TICA transactions Aim: To demonstrate removing a pensioner concession and swapping registered operators	Facilitator		
11:30 - 12:15	Lunch			
12:15 - 1:30	Other TICA transactions continue Aim: To demonstrate removing a pensioner concession and swapping registered operators	Facilitator		
1:30 -1:45	Break			
1:45 - 2:20	Adult Proof of Age Card Aim: Gives an understanding of adult proof of age card	Facilitator		
2:20 -3:00	Disability Parking Permit Aim: Gives an understanding of disabled parking permit	Facilitator		
3:00 - 3:20	Using DMS Aim: To demonstrate how to set and use the Document Management System to view written correspondence from customers.			
3:20- 3:30	Review Aim: Review and refresh key learning	Facilitator		
3:30 - 4:00	Revision Aim: Revise procedures.	Facilitator to arrange		

#### To change Pay Term or CTP Insurer or apply RRRF

^
Changes: CTP=Compulsory Third Party TCE=Input Tax Credit Entitlement (GST) RRRF=Registration Renewal Reinstatement Fee (the fee is charged, after the expiry date)

## CTP Insurer can be changed:

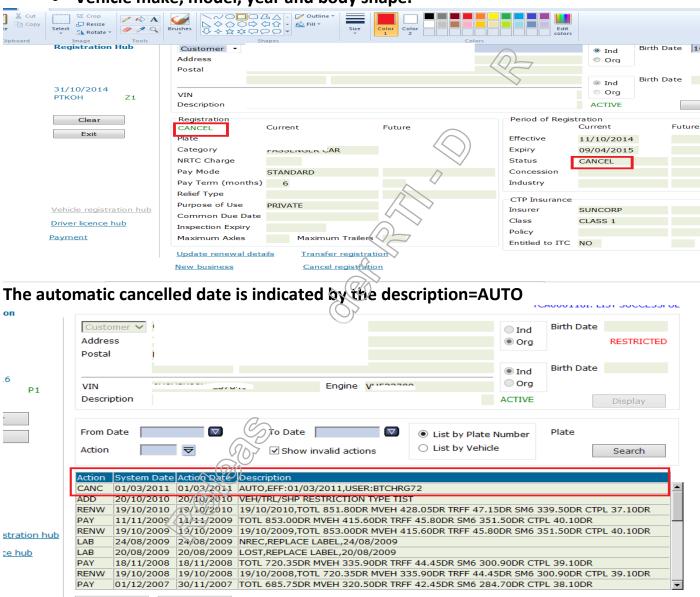
- On or before registration expiry date and before payment is made.
- During current registration period. Change will take effect from beginning of next period.



If the registration has been cancelled, you can verbally release the following information, if requested, as long as the customer has provided either a Rego or Vehicle Identification number.

- No EOI is required.
- Registration status is, "not registered."
- Purpose of use.
- Auto Cancellation date.
- Learner Approved Motorcycle (LAM) status if applicable.
- VIN number or plate number, whichever was not provided.
- Vehicle make, model, year and body shape.

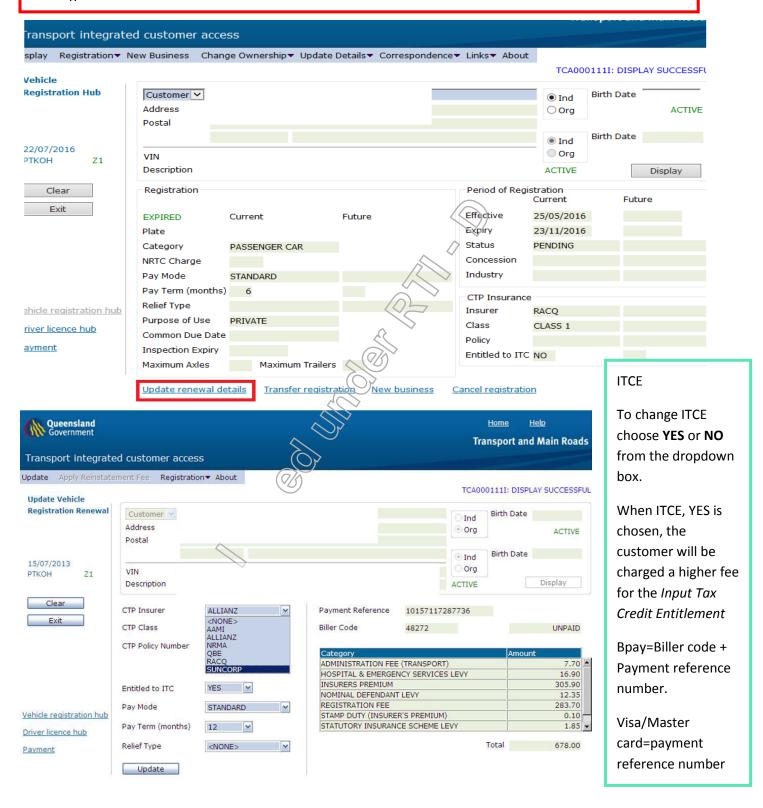
Invalidate...



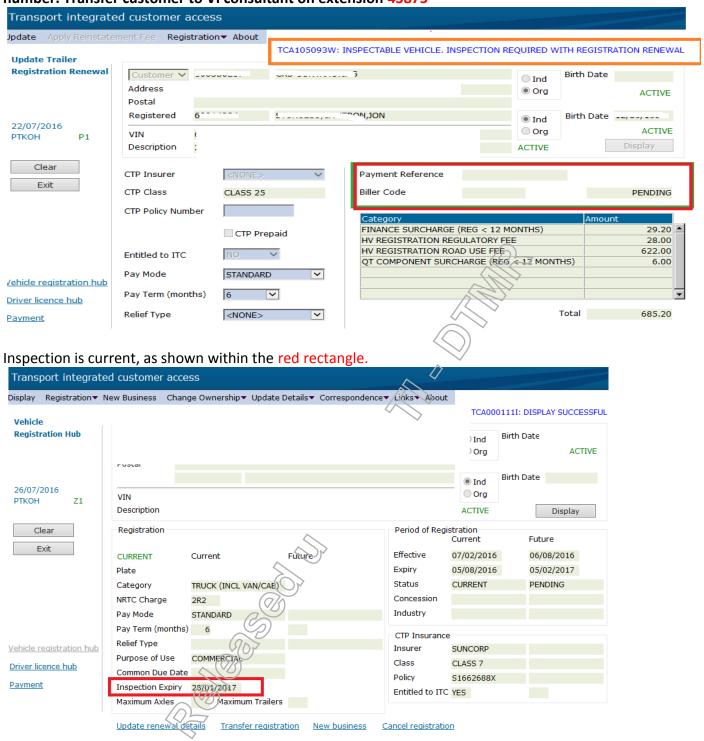
Providing a Payment Reference Number (PRN) for a non inspectable vehicle, or a vehicle with current inspection recorded. This cannot be done for a vehicle which has been enrolled in Direct Debit.

If the customer is paying the registration for a vehicle, which is in any of the above status, make changes if applicable.

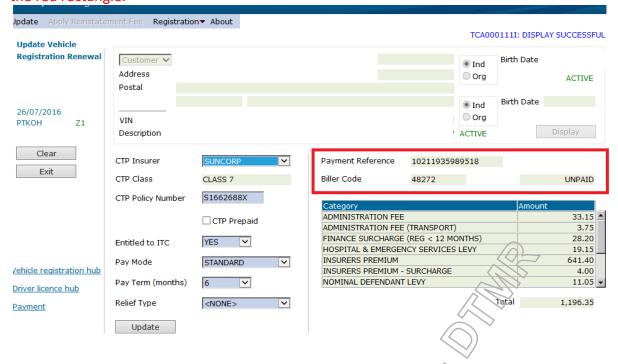
Click the **Update Renewal Details** Link and then click **on Update** to apply the change, as well as to incorporate the Registration Renewal Reinstatement Fee.



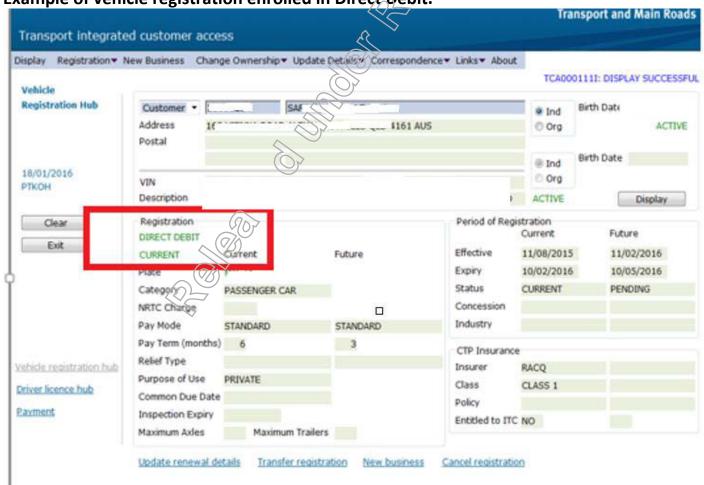
Inspectable vehicle which requires a Certificate of Inspection, does not have any payment reference number. Transfer customer to VI consultant on extension 45875



Click on Update renewal details, and there is payment reference number, with Biller Code, as shown within the red rectangle.



Example of vehicle registration enrolled in Direct Debit.

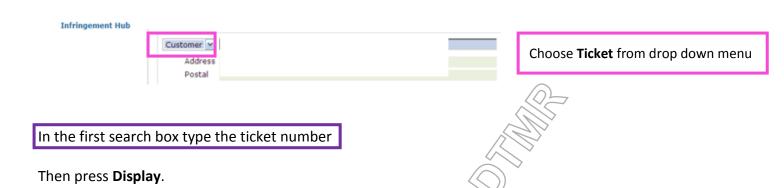


## **During Change of Address - Searching for outstanding Infringements**

Start in the Infringement hub, after the customer has been displayed. If customer has not been displayed, then:

Search using the infringement number, customer's licence number, CRN or by performing a name search.

To conduct a search using an infringement number, select ticket from the drop down menu.



Note: If the infringement or ticket has a prefix, there is no need to enter a space between the prefix and the infringement number.

When an infringement has a suffix, there is no need to enter this number when performing a search. E.g. A

4587593 X, you would type A4587593 (no space or suffix).





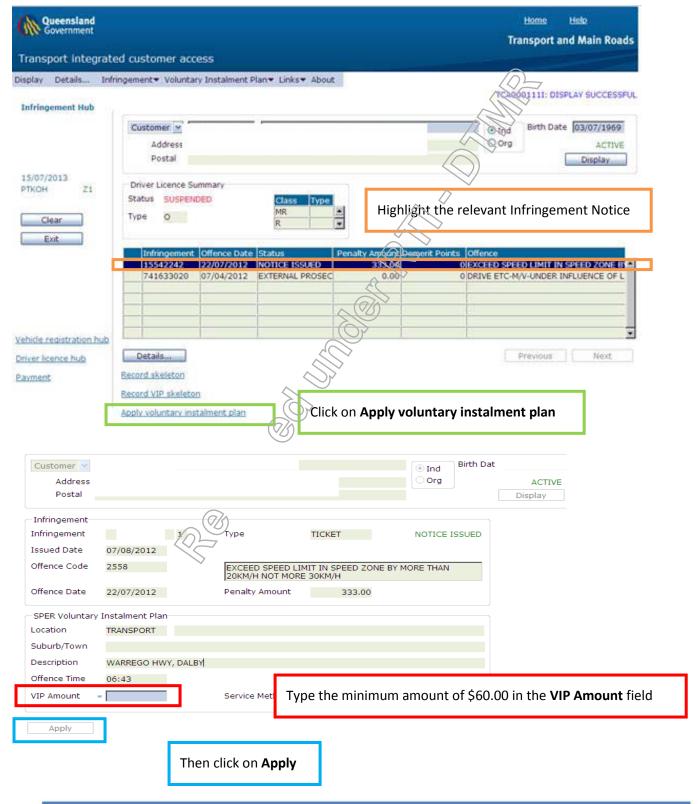
Go to KAOS to see examples of Infringement Notices

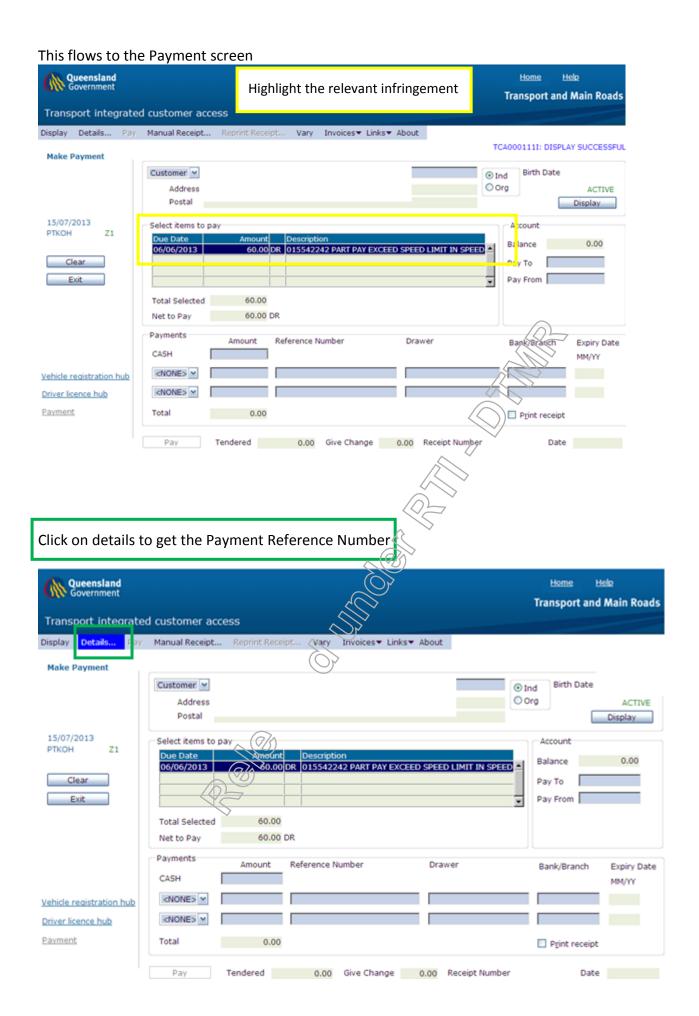


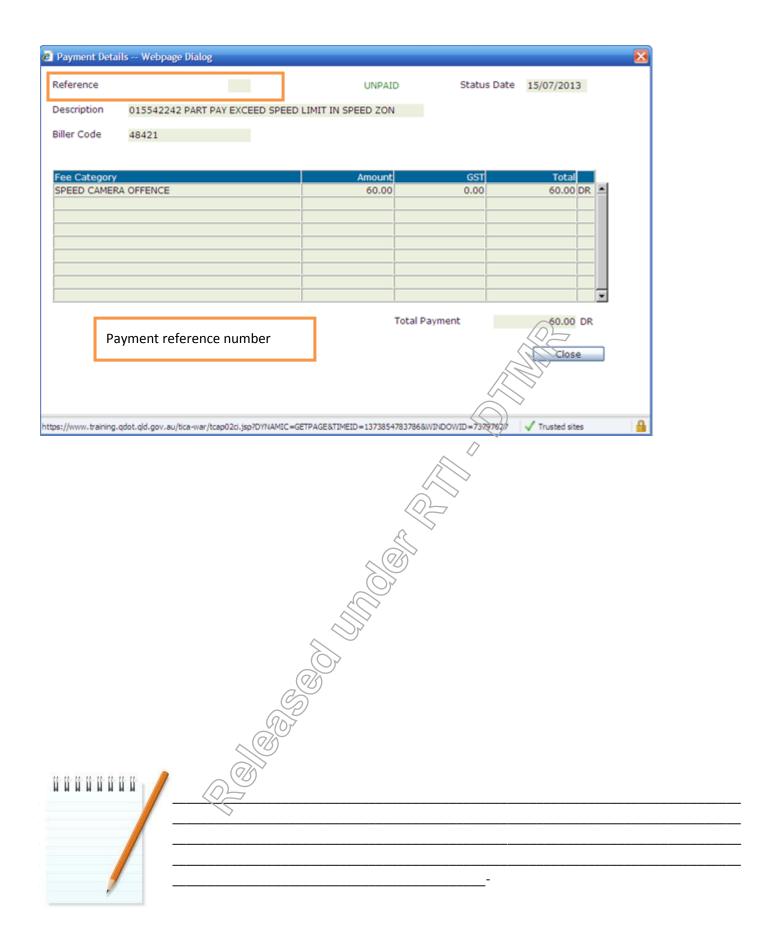
Apply VIP and Provide Payment Reference Number for electronic issued Infringement Notices. This can only be done, if the customer is paying for the VIP application on 132390, or on TMR website, on the same day, the customer calls.

#### For Fines =>\$200

- Go to TICA homepage
- Click on Individual Customer Hub, Input the CRN for identification
- Then click Home again to get to the TICA homepage
- Select Infringement Hub

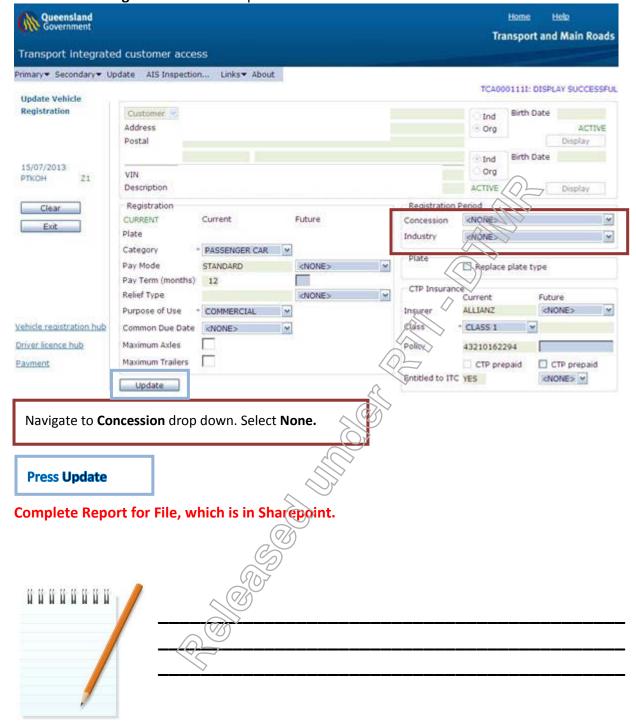






#### **Remove Pension Concession**

- Go to Registration Hub
- Navigate to top of page, hover mouse over **Update Details**
- Select Registration from drop down menu



## **Adult Proof of Age Card (APA Card)**

The Adult Proof of Age Card replaced the 18+ card

- provides proof of age for Queenslanders aged 18 years or older
- is ideal for people who don't hold a driver licence or passport
- applicant has an option (to have/not to have,) the address displayed on the card

To apply for an Adult Proof of Age Card, you must:

- be at least 17 years and 11 months of age
- complete the Adult Proof of Age Card Application/Replacement F4772 and provide Standard Evidence of Identity DON'T FORGET TO
- Pay the <u>fee</u>.

If you are **younger than 18 years** of age when you apply for the card:

- your application will be processed and your card will be sent to the licence issuing centre, where you applied for your card
- You will be contacted when your card is available, but you will not be able to collect your card until you turn 18 years of age.

If you are 18 years or over when you lodge your application, your card will be sent to your mailing address within 14 days.



1	I do not have a photographic Licence of Passport, but would like to have a Photo Identification. How do obtain one?
L	
2.	What are the details, which will be printed on the card?

CHECK KAOS.

	plicant is unable to sign, due to physical disability, but a Power of Attorney exists. What does look to apply for an APA Card?
What E	OI documents do I need, to apply for one?
What is	s the cost of the APA Card? Can I be given a free card?
Lwill b	e turning 18 years old in one month's time. Can I apply for this card now?
T WIII DO	turning 18 years old in one month's time. Can't apply for this card now:
I live in	a remote area and the nearest DTMR customer service centre is about 4 hours' drive away. H
	oly for an APA Card?
	ST. 11 11 11 11 11 11 11 11 11 11 11 11 11
H H H I	
	<b>/</b>

## **Disability Parking Permit Scheme**

A Disability Parking Permit provides parking concessions in designated areas, to eligible persons who have a severe restriction, to their functional ability to walk.

• Australian Disability Parking Permit (ADPP). Application for individual F4814, organisation F4881

	Туре	Period of Issue			
In	dividual <b>A1</b>				
In	dividual <b>A5</b>				
Oı	ganisation <b>AC</b>				
•	How do I apply for an Australia	P P P P P P P P P P P P P P P P P P P			
1.	b. Where do I submit my application?				
2.		ility Parking Permit? Can I renew this when it expires? Can I use an expired			
3.	If a customer phones and has	a question about Disability Parking, where can you find information?			

	ones enquiring about their application, which was submitted by post 7 days ago, wormation to assist you, in advising the customer?
	o and talend and require 2 negrets and for my one the talend and and for my
	e area Island and require 2 permits – one for my car on the Island and one for my low do I apply for a second permit?
y husband has	passed away and I no longer need his permit. What should I do?
ow much is it to	o apply for a Permit and how do pay this?
м и и и и	l

## Document Management System (DMS)

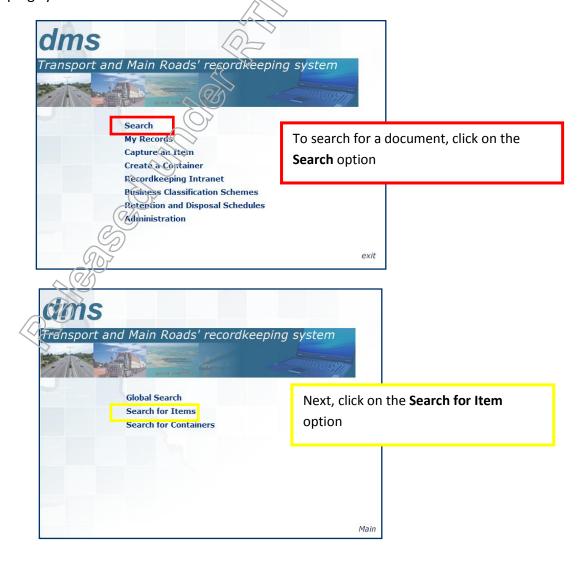
## Setting up DMS

The Document Management System (DMS) is Transport and Main Roads' (TMR) official recordkeeping system. DMS is used to manage records in electronic, paper and object (such as videos, photos, etc) form. DMS allows you to view written correspondence sent in by customers, to Central Operations Support. It also allows us to look at the responses sent in reply, back to the customers. This system can be especially helpful if a customer rings regarding correspondence, as it provides you direct access to the customer's letter.

You will receive an email containing the configuration button for the New DMS database - Transport Services CBD. Click on the button and it will take you to the Home Page of the New DMS Database

Click here to add and configure Transport Services - CBD DMS to your system

Once you have clicked the button to configure DMS, clicking on the icon will open up DMS, Transport and Main Roads' recordkeeping system.



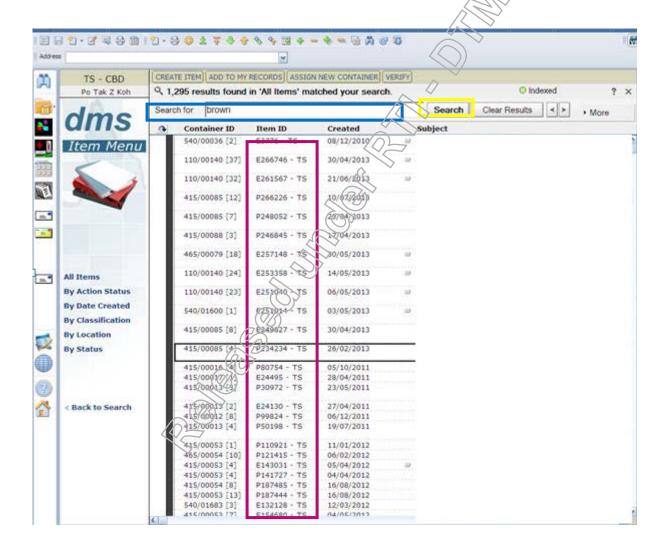
In the Search for field, type either the customer's name, Item ID, CRN or Drivers Licence Number

Press **Search** to bring up results that match your search

All Item IDs will start with either a P or E

P documents: Are created as a reference to another document (usually incoming from a customer) and generally will have the customers' application documents.

E documents: Are created in electronic form and will have an attachment to view. These are often created in response to a customer's enquiry for example, a letter sent to the customer from Customer Operations Support (COS).

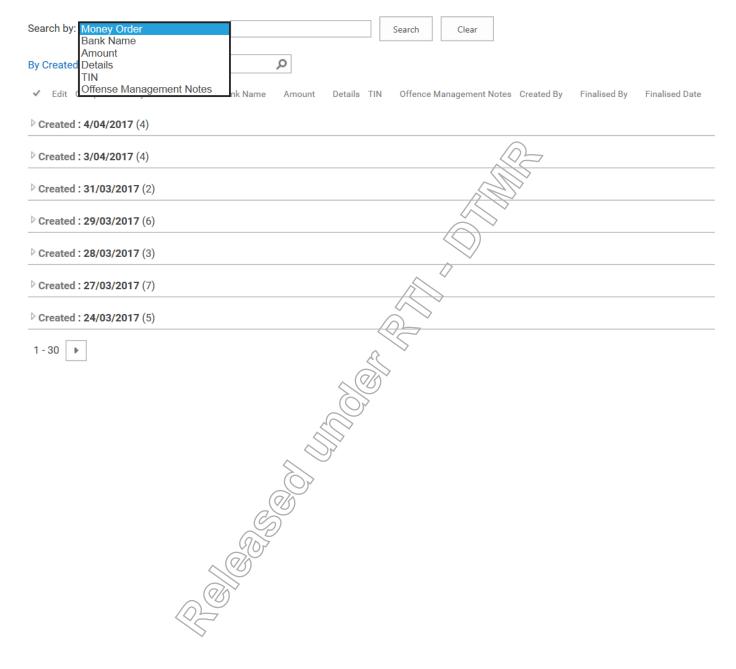


To view the documents attached Click in the Item ID

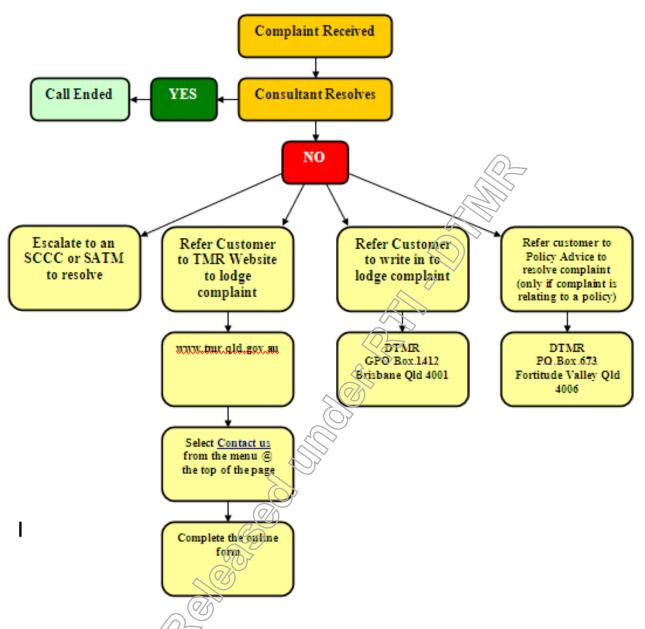
Irregular Schedule: Infringement payment records: KAOS→Quick Reference Guide → I → Irregular Schedule.

This System is used to retrieve information relating to payment of Infringement Notices, sent by mail to Central Operations Support.

Select the search Parameters accordingly, and type the required detail for the parameter selected on the "search" filed.



## Client Relations Consultants **Complaint Management Process**



Bomb Threat, Customer threats/aggression, self-harm threats- refer to Sharepoint→Quick Reference Guide→B

#### **Appendix One** Change of address process for individual n TICA, go to Individual Hub. Can I begin with For identification your CRN/Rego number.If purposes, I am Click "Update neither is available, Address" link required to ask you a search with name. Verify series of questions. address and phone number. Proceed to the Check Sheet. **Non Compliant** In TICA, go to "Home." Change address details as Address. Hover over "customer and required, asking customer to Ensure all search options are spell any complex names. click "Correspondence Hub. explored. It could be a simple Update mobile no. in Econtact Is there an infringement Check mail sent out before spelling error. details, if necessary. this change of address. in the "Notice Status?" Then, select "override" LWAYS check Postal Resend, if necessary. If so, provide PRN for Address. Non compliant? TCO, Q,E,Z tickets and infringement number Confirm the number of for handed ticket with registrations in customer's Click on link, to prefix A, R, M name. If rego has expired, notify Disability Do you have a Disability Yes or due within 4 weeks of Parking Permit? Parking Team. expiry date, offer Payment Reference No Go to Number/Biller code, for "Infringement non inspectable vehicles Go to the Licensing Hub" Hub If registrations are in two different CRN, confirm details, update address on 2<sup>nd</sup> CRN and request Manually print a new address for a Merge in KAOS label from TICA. (The SCCC will mail it out). You will, receive an address label Does the DL screen within 5-10 working days

**Note:** Advise your customer that, changing the address for the individual, does not change the address of any vehicles in the Business/Trust name.

No

No action to be taken. Advise that an address tabel will be posted within 530 working

Go to Registration Hub

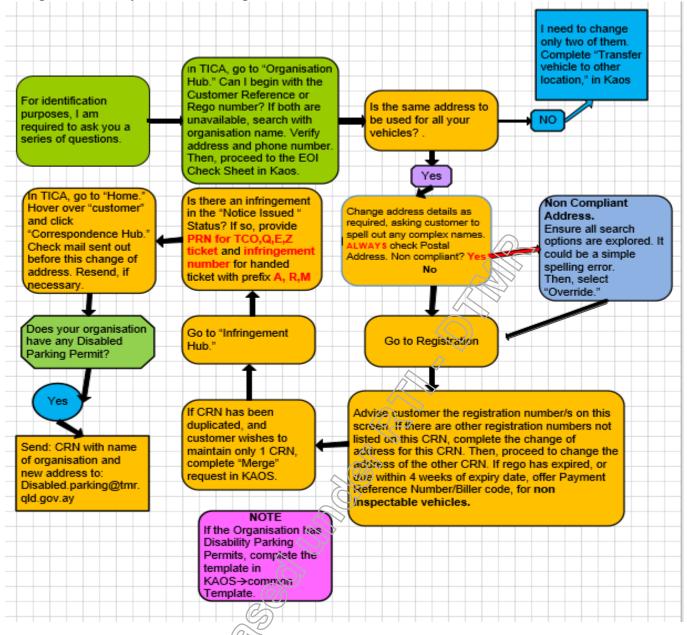
show a "Datacard

number?"

If the vehicle is in the name of a Business, Organisation or Trust as the Primary Registered Operator and you failed to identify it with the EOI Check Sheet, you can identify the Secondary Registered Operator.

## **Appendix Two**

#### Change of address process for an organisation



If customer wishes to move a few of the vehicles from one CRN to either a new CRN or another CRN, do not change the address, but complete the template in KAOS→Common Templates → Transferring vehicles to another location (same Company name).

## **Appendix Three**

#### **Category A Document**

- Full Australian Original Birth Certificate.
- Qld Births, Deaths and Marriage Birth Extract only, if person held Qld Driver Licence current, cancelled or expired <2 years (e.g. replace a misplaced Qld DL or reissue a Qld Cancelled Lic)
- Extract from Qld Adopted Children Register.
- Northern Territory Aboriginal Population Records.
- Bicentennial Birth Certificate issued for birth in 1988
- Australian Citizenship Certificate.
- Australian Declaratory Certificate of Citizenship Card.
- Australian Citizenship by descent or extract of Citizenship by Descent Certificate.
- Australian Naturalisation Certificate.
- Citizenship Certificate issued under the Australian Citizenship Act 1948 by the Australian High Commission, Port Moresby, Papua New Guinea.
- Australian/Foreign Passport (current or expired<2 years), may be used by any person listed on it.
- Australian Frequent Traveller Passport
- Australian Official Passport
- Diplomatic Passport
- Dept Immigration Travel Document Valid up to 5 years-calculated from the date of grant of Visa.
- Dept of Immigration & Border protection Certificate of Status for NZ Residents in Australia.
- Dept of Immigration & Border protection **Permanent Resident Evidence (PRE)** ImmiCard issued to people who have been granted a protection visa (subclass 866)
- Dept of Immigration & Citizenship Travel Visa-valid up to 5 years from date of grant.
- Dept of Immigration & Border Protection Residence Determination ImmiCard (RDI) issued to immigration detainees accommodated in the community who are not Australian citizens and do not hold a visa.
- Dept of Immigration & Border protection-Evidence of Immigration status-Bridging Visa
- Dept of Immigration & Border Protection Visa Evidence Card with Visa label attached.
- Dept of Immigration & Border Protection Immigrate Australian Migration Status
- Australian Photo Driver Licence current or expired < 2 years</li>
- Queensland or Federal Police Officer Photo Identity Card
- Queensland 18+ issued after 1/1 1992
- DTMR laminated Driver Authorisation current or expired < 2 years</li>
- DTMR laminated Accreditation/Industry Licence current/expired < 2 years</li>
- Photographic Qld High Risk Work Licence (current or expired <2 years.</li>

#### **Category B Documents**

- Current Australian Medicare Card/digital copy (displaying applicant's name)-Green, Blue, Yellow. Green Medicare Smartcards issued to Tasmanian. (Including the digital wallet version)
- Plastic Financia institution, Debit/Credit Card with signature & Name embossed/printed.
- Plastic Financial Institution, Debit/Credit Card without embossed/printed name/signature (with supporting letter from the Financial Institution-showing full name, address, account/card no.& signature.)
- Financial Passbook (with supporting letter from Financial Institution)
- Australian Defence Force Photo Identity card.
- Dept. of Veterans' Affairs/Human Services, including Healthcare Cards. (may be used by anyone listed on the card) including digital wallet version.
- Australian issued Security Guard/Crowd Controller Licence with photo.
- Australia issued Firearm Licence with photo.
- Educational Institution Student Identity Document with photo/and or signature.
- Interstate Government issued or approve Proof of Age Card or "photo card (WA & NSW)"
- The Department of Human Services Basics Card-may only be used by the person, whom the card is issued to.

Department of Corrective Services - Form 16 Leave of Absence Order-must be presented on the date it is issued and the applicant be accompanied by a Corrective Services Officer, who can verify the authenticity of the form.

#### **Evidence of Queensland Garage Address-does not have to be original**

- Current lease, rent book, Notice of Body Corporate Fees
- Category A/B document with address.
- Comprehensive Insurance papers, which indicate a vehicle's complete garaging address.
- Queensland Local Government Rates Notice current
- Australian Tax Office Assessment Last or Current financial year
- Electricity/Gas/Phone (including mobile phone) account including a Printed copy from the Internet
- Bank Statement Less than 6 Months old and linking to the debit/credit card supplied.
- Mortgage/Certificate.
- **Taxation Notice of Assessment**

#### \*\*If unable to provide the above documents for Garage Address, one of the following is acceptable\*\*

Complete Proof of Queensland Garage Statement F4408-not the property owner.

Verifying person must be at least 18 yrs. and have a Qld DL or provide a garage address document with either 1 Category A or B.

#### **Exemption**

Persons who have relocated interstate to escape a Domestic and Family Violence (DFV) situation, may transfer the Queensland registered vehicle into their name only, in Queensland for the purpose of cancellation and re-registration in another state without a Queensland Garage address.

## Evidence of Queensland Residency must be original including printed from the internet

- Same documents as for Garage Address, plus
- Qld Land tax Valuation Notice
- Contract of purchase, mortgage/ land ownership certificate
- Australian Taxation Office Tax File Number Confirmation-last or current financial year.
- Qld Driver licence renewal/vehicle regorenewal.
- Qld Vehicle Rego Certificate
- Australian electoral document (an Acknowledgement of Electoral enrolment letter/Card.
- Official letter from Centrelink/ Dept Human Services-issued within 6 months.

### \*\*If unable to provide the above documents, one of the following is acceptable\*\*

- Complete The Qld Residency Declaration Form QF4208
- Employer's Statement on organisations letterhead
- Education Institution Statement on Educational Institutes letterhead

#### **Evidence Required – Change of Name (Complete QF4214)**

- Change of Name Certificate issued by Births/Deaths & Marriages
- Marriage Certificate issued by Births/Deaths & Marriages-to change surname only
- Overseas Marriage Certificate with Registration Number & Official Crest + 1 Category A, or 2 Category B in the married name
- Amended Birth Certificate with notations issued by Births/Deaths & Marriages
- Divorce Paper/Decree Nisi or Absolute provided this shows the name being reverted to
- Overseas Divorce Paper + 1 Category A/B, in the name being reverted to
- Deed Poll issued prior to 1/February 2004
- Civil Partnership Certificate or Relationship Certificate issued by Births/Deaths & Marriages.
- **Children's birth Certificate** issued by the Registrar of the relevant Births, Deaths & Marriages. This can be used for a married/maiden name change of a mother where both names are displayed on the certificate.
- **Deed Poll** (issued prior to 01/02/2004).

## **Appendix Four**

## **Fast paths on TRAILS**

#### Customer

LCUS - Customer Individual Search

LORG - Customer Organisation Search

**ADDR** - Customer Address Maintenance

**REST – Customer Restriction Maintenance** 

#### **Involved Party**

LINP - Involved Party Search

#### Correspondence

**CORI** – Maintain Correspondence Item

**DCOR** – Maintain Demerit Point Correspondence

SCOR-Search and list sanction correspondence

#### **OFFENCE**

INFR - Maintain Infringement

**LINF** – List Customer Infringements

LINO - List Infringement by other Criteria

**CODE** – List / Maintain Standard Series

#### **Finance**

STAT Customer Account Statement-to check payment received, refunded. (Start Date

...01/01/2000)

Search and maintain payment request-to investigate how payment was made and to reissue LREQ

Tax Invoice.

Search payment with receipt number **PAYM** 

## **Appendix Five**

# How to obtain a certified copy

## **Verification of Identity – Approved Witnesses**

You will need to sign all documents in the presence of a witness, or local equivalent, who is either a:

- Doctor
- Police Officer
- Consular or Ambassadorial Officer
- Solicitor, Barrister or Judge
- Justice of the Peace or a Commissioner for Declarations
- Notary Public or a person authorised by law to witness & sign declarations

The witness must sign and print their full name, position title/designation and contact details (including office stamp).

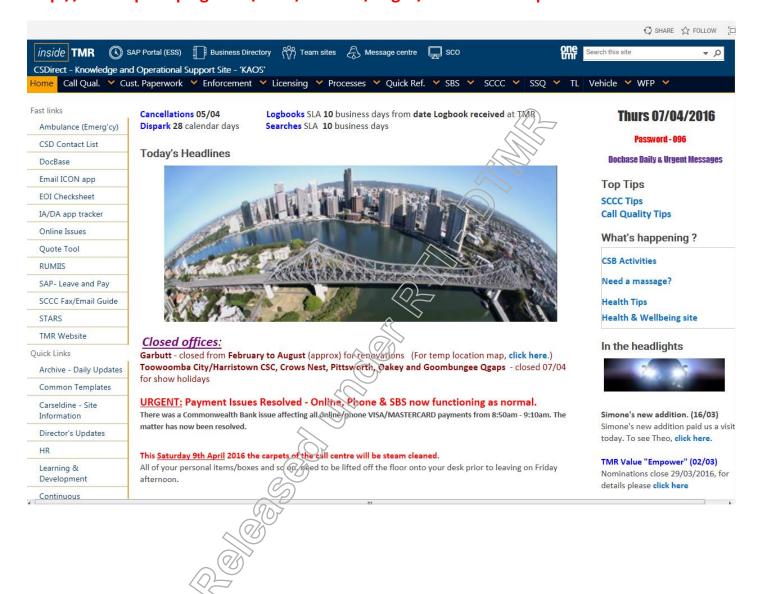
**Note:** You may have to pay a fee to have the documents witnessed. All documents are to be witnessed in English or have an English translation

A	Alpha	N	November
В	Bravo	0	Oscar
C	Charlie	P	Papa
D	Delta	Q	Quebec
Ε	Echo	R	Romeo
F	Foxtrot	S	Sierra
G	Golf	T	Tango
Н	Hotel	U	Uniform
	India 🍣	<b>&gt;</b>	Victor
J	Juliet	W	Whiskey
K	Kilo	X	X-Ray
L	<b>↓</b> ima	Y	Yankee
M	Mike	Z	Zulu

## **Appendix Seven**

To launch CSD Share Point: open Internet explorer and type the following in the address bar:

http://share.qdot.qld.gov.au/sites/csdkaos/Pages/defaultnew.aspx



## **Appendix Eight**

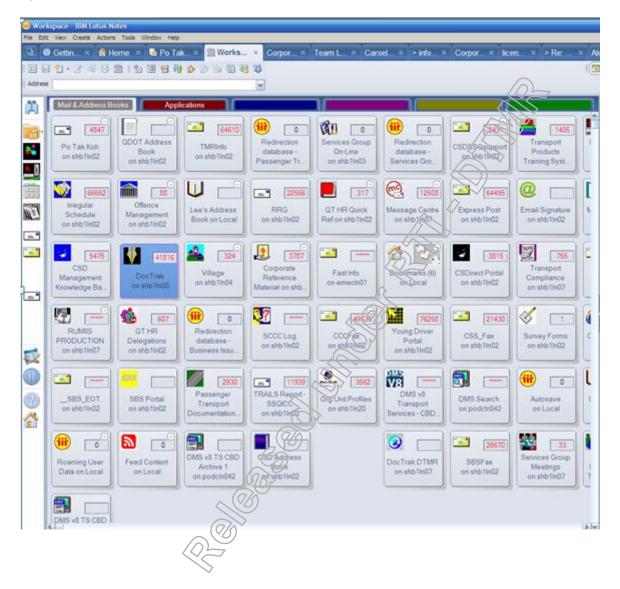
### **IBM Notes - Work Space**

To set up Work Space

Click on Binoculars

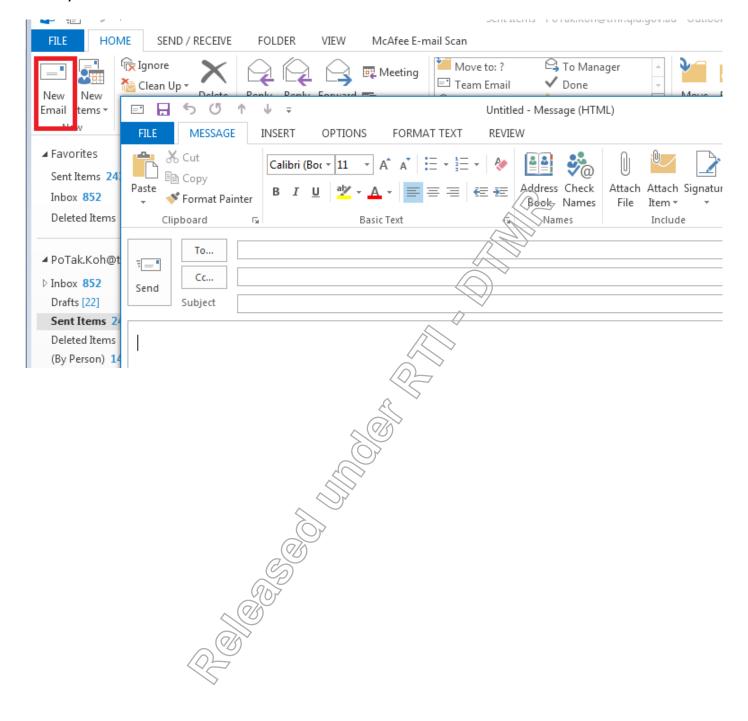
A find search will appear, Type in Work Space

Open to launch

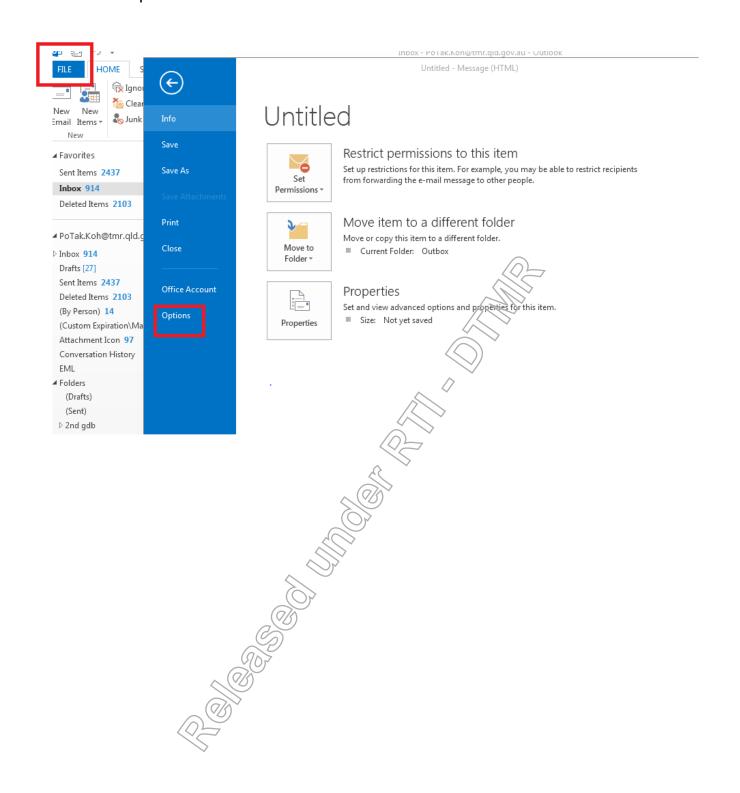


## **Appendix Nine**

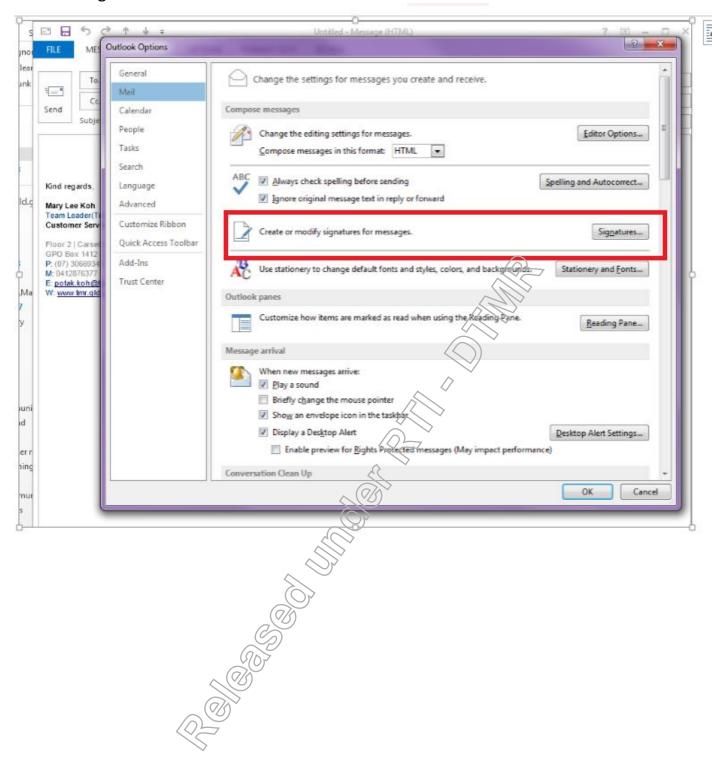
To create your email signature: Copy a signature block from one of the consultant's emails, from your Inbox. Click on the Start Button→click on Outlook→click on New Email



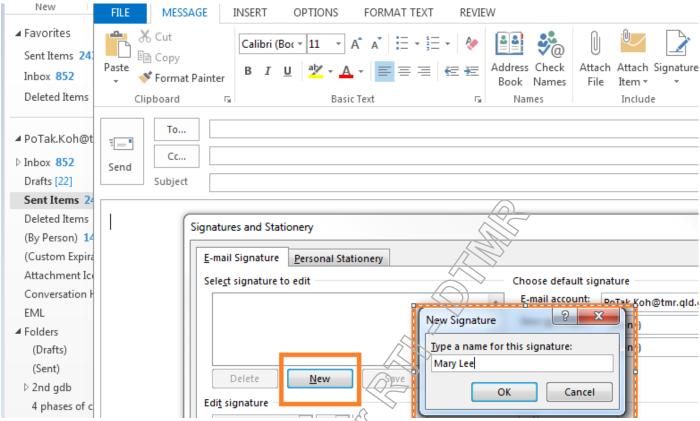
## Click on FILE → Options.



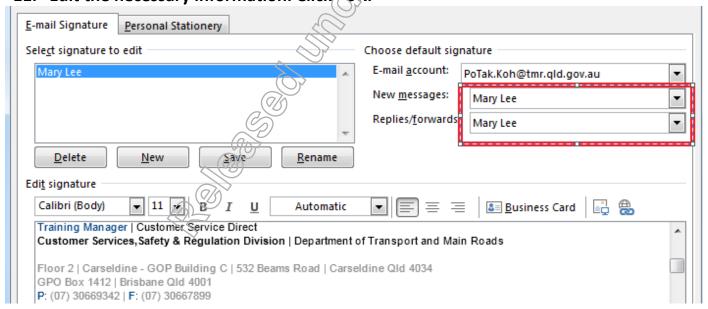
## Click on "Signature."



## Type your name, as you want it to be on the signature. Click OK.

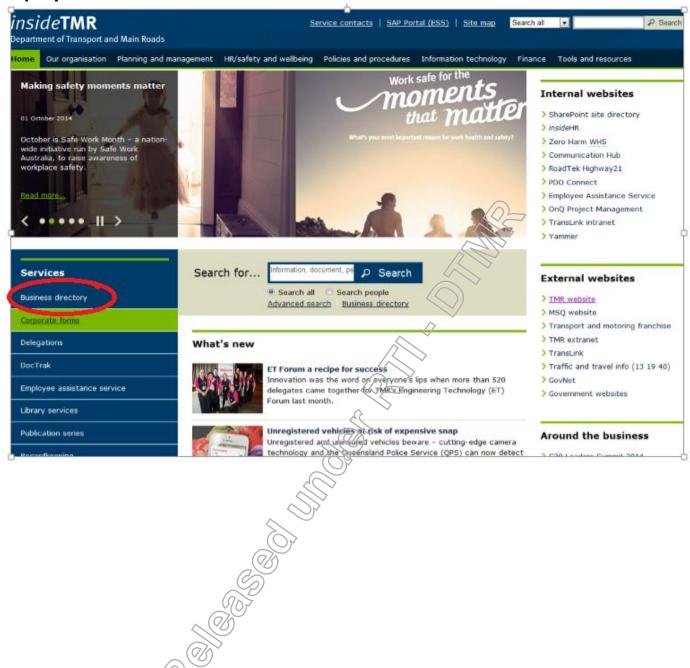


Paste the copied signature block in the space provided. Change it to "Calibri," and font "11." Edit the necessary information. Click "OK."



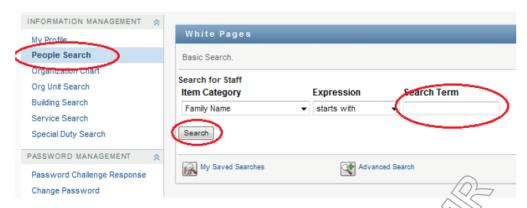
## **Appendix Ten**

Business Directory - to locate contact numbers for various services and TMR employees.



## Person Search:

To search for a person select People Search from the Information Management menu; click on New Search; enter the persons' last name in the Search Term field; and click Search.



You can also use the drop down menus in the Item Category and Expression fields to change your search parameters.

When the search results page displays you can find the person you are looking for by searching the list for their details. The list displays first names, position titles, phone numbers, email address, and login ID.

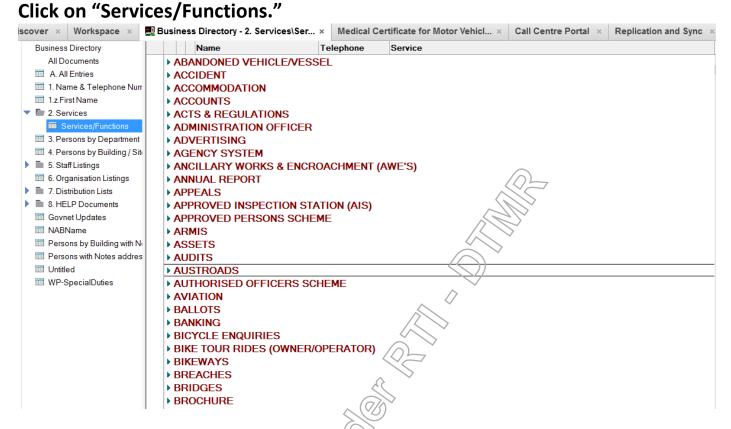


You can open the persons profile by clicking on their name.

## **Appendix Eleven**

### **Service Search**

**Open Business Directory in Workspace.** 



Other Services which are available mwww.tmr.qld.gov.au:

Transport and Main Roads Customer Service Centres-locations and available services.

Mobile Customer Service Centres.

Maritime Safety Queensland Offices.

## **Appendix Twelve**

## Using the phones



## **Answering a Call**

Calls will automatically drop in the live environment

## Placing a Customer on Hold

Place the customer on Hold by pressing the Hold button

### Placing a Customer on Hold to speak a Third Party

- 1. Select "Conf" button and enter the required extension number. (example: 45818=SCCC) By selecting "Conf", this automatically places the customer on hold.
- 2. Once your call has been answered and if there is a need to bring the customer into the conversation, you select "Conf" button a second time. By following this process, it enables you to warm transfer the call. You can leave the conversation by htting the "Goodbye" button and this will leave the customer in conversation with the third party. (example the SCCC or the Customer Service Centre Administration Officer)
- 3. If there is no requirement for the customer to speak with either SCCC or the Customer Service Centre Administration Office: you can end the conversation between you and the third party, by hitting the 'Goodbye' button. This enables you to return to your customer by picking up the 'flashing' "In-Calls" button on the lower right of your handset.

## Going between the customer and a Third Party without transferring the call

To place the Third Party on Hold and return to the customer,

Press "In-Calls" (Green Button)

To go back to the Third Party

Press the "Conf" button (Soft Key) again

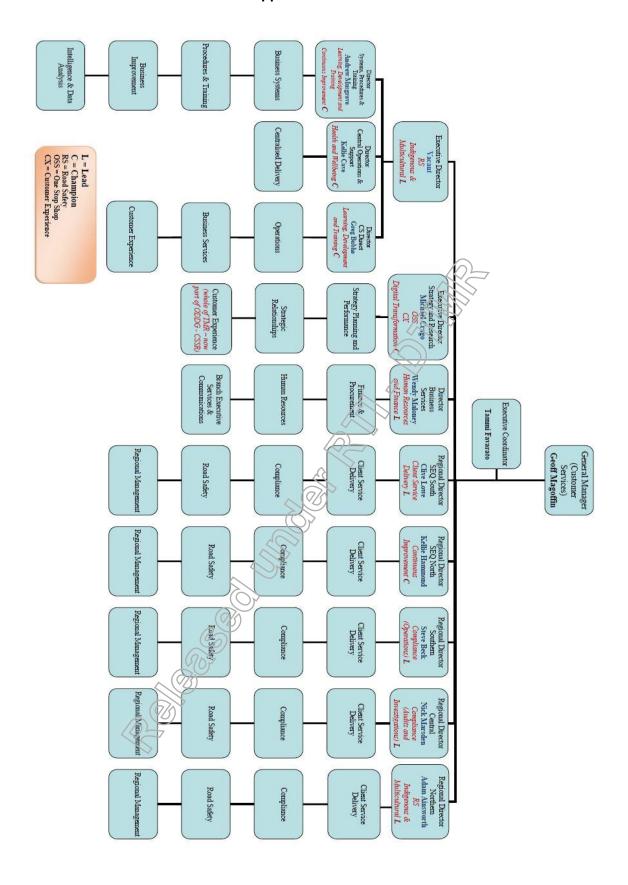
#### Cold Transferring a Call

Place the customer on Hold by pressing the "TRANS" button (Soft Key)

Dial an Extension number or if calling a full number, dial a zero before it.

Press the "TRANS" button (Soft Key)

#### **Appendix Thirteen**



## **Call Centre**

