



# TrueID

**VOI & VOA Software System**

## **Appointed Identity Agent User Guide**

**November 2016**

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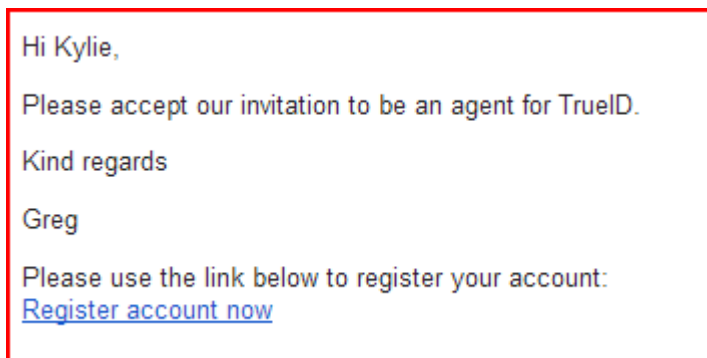
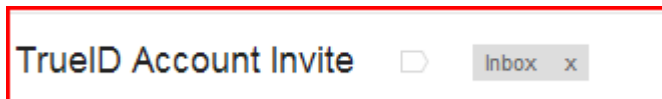
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## ACCOUNT SET UP

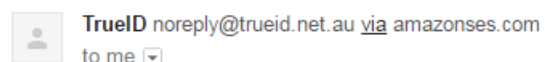
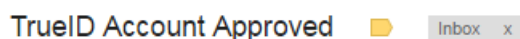
### GETTING AN ACCOUNT

To obtain a TrueID identity agent account you need to be invited by a licensee or verifier.

You will receive an Account Invite by the licensee via email.



- 1) Click on the link
- 2) Complete username and password  
*TIP: Your username should be your name i.e. John Doe*
- 3) Click 'register now'
- 4) Once you have registered an email will be sent to the nominated licensee or verifier to authorise your account.
- 5) Once authorised you receive an email to state your TrueID Account has been approved and will prompt you to the **'home page'**.



Your TrueID account has been approved.

Please use the link below to view your home page:  
[Home page](#)

- 1) Your account is now registered and ready to login

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## LOGGING IN TO TRUE ID

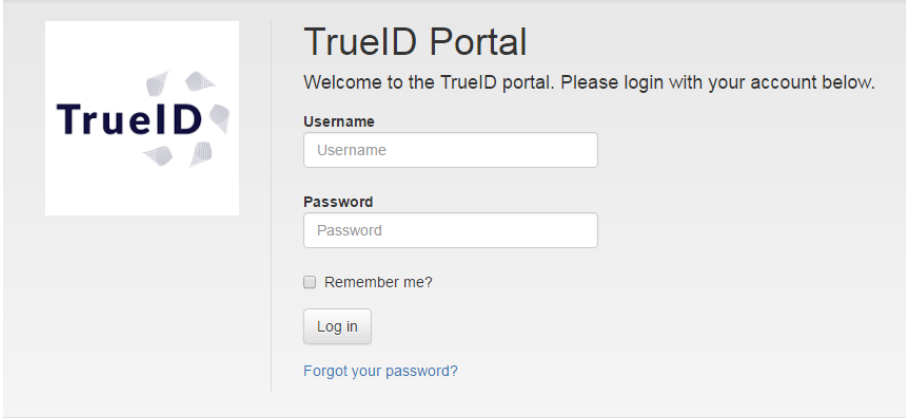
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To login to your TrueID account go to <https://secure.trueid.net.au>

Enter your username and password.

*TIP: There are 3 login opportunities and your account will be locked for 24hrs*

- 1) Enter your username and password.

A screenshot of the TrueID Portal login page. On the left is the TrueID logo, which consists of the word 'TrueID' in a bold, sans-serif font next to a circular icon made of several grey, petal-like shapes. To the right of the logo, the text 'TrueID Portal' is displayed in a large, bold font. Below this, a welcome message reads 'Welcome to the TrueID portal. Please login with your account below.' The login form includes a 'Username' label above a text input field containing the placeholder 'Username', followed by a 'Password' label above a text input field containing the placeholder 'Password'. Below the password field is a checkbox labeled 'Remember me?'. A 'Log in' button is positioned below the checkbox. At the bottom of the form, there is a blue hyperlink that says 'Forgot your password?'.

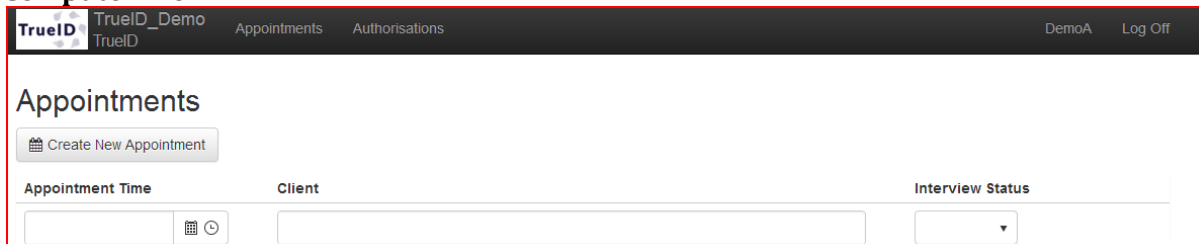
- 2) Suggest that after 2 attempts click the **“Forgot your password”** for a new one to be sent to your email

**TIP: On your first login you will need to complete a profile including your electronic signature (see page 16)**

## TRUE ID MAIN PAGE OVERVIEW

Once you are logged in the following page will appear as the licensee. There are 3 main functions across the top; the following is a brief overview of functions that you have access to as an agent. The webpage will slightly vary to a tablet and a smart phone device as shown in the diagrams below.

### Computer View



### [1: Appointment](#)

The **Appointment** tab allows you to create a new verification appointment (VOI) and search interviews by date, client, and agent or interview status. See more in the user guide on the functions in the appointment tab.

### [2: Authorisations](#)

The **Authorisation** tab allows you to create a new authorisation appointment (VOA) and search authorisations by date, client, and agent or interview status. See more in the user guide on the functions in the authorisations tab.

### [3: Username/Company name](#)

The **user name** displays all your personal information, manages your password and stores your electronic signature, which is automatically uploaded onto the certificates. See more in the user guide on the functions in the username tab.

### [4: Log Off](#)

Click here to log off the system – for security reasons it is recommended you log out of the system when complete.

## APPOINTMENT TAB

### STEPS TO COMPLETE A VERIFICATION/INTERVIEW

#### Create a new appointment

- 1) Open up the appointments tab
- 2) Click on the **"Create New Appointment"**

The screenshot shows the TrueID web application interface. At the top, there is a navigation bar with the TrueID logo, the text 'TrueID\_Demo TrueID', and tabs for 'Appointments' (which is highlighted with a blue circle) and 'Authorisations'. On the right side of the navigation bar are links for 'DemoA' and 'Log Off'. Below the navigation bar, the main heading 'Appointments' is displayed, with a 'Create New Appointment' button (also circled in blue) positioned directly beneath it. Below this heading, there are three input fields: 'Appointment Time' with a calendar icon, 'Client' with a text input field, and 'Interview Status' with a dropdown arrow.

- 3) Complete the questions as prompted including appointment time, agent and the name of the interview click **"Create"**

#### Create Appointment

This screenshot shows the 'Create Appointment' form. It begins with a 'Back' button. The form contains several fields: 'Appointment Time' with a text input and a calendar icon, a placeholder '(d MMM yyyy hh:mm AM/PM)', 'Agent' with a dropdown menu showing 'Ben Martin', 'First Name' with a text input, and 'Last Name' with a text input. At the bottom of the form is a 'Create' button, which is circled in blue. A 'Back to List' link is located at the bottom left of the form.

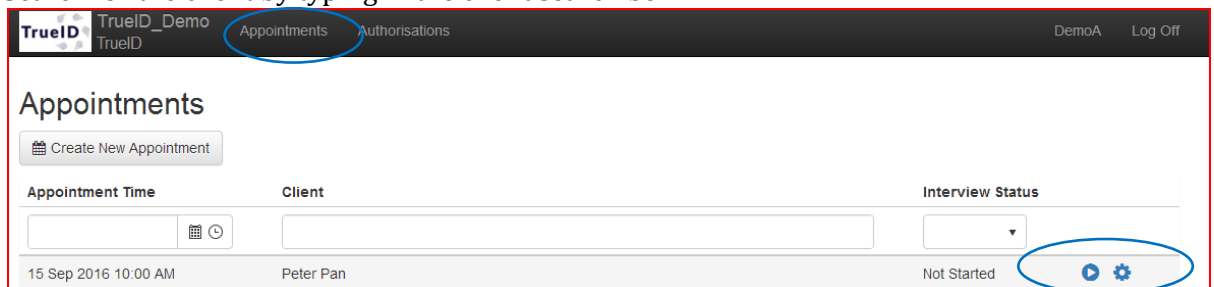
- 4) This will automatically add the client into the appointment list


This screenshot shows the TrueID web application interface after a new appointment has been created. The 'Appointments' tab is active. The 'Appointment Time' field now contains '15 Sep 2016 10:00 AM', the 'Client' field contains 'Peter Pan', and the 'Interview Status' field contains 'Not Started'. There are blue play and gear icons to the right of the 'Not Started' status. The 'Create New Appointment' button is still visible at the top.

## Begin the verification – Interview Details Page

Once you arrive at your appointment

- 1) Open the appointment tab
- 2) Search for the client by typing in the client search box.



- 3) Click the play button 
- 4) The interview commences and the following page opens. There are 5 tabs requiring information – client details, location, documents, client acceptance and submit  
Note: each tab will change to green with a tick to indicate the section is complete.

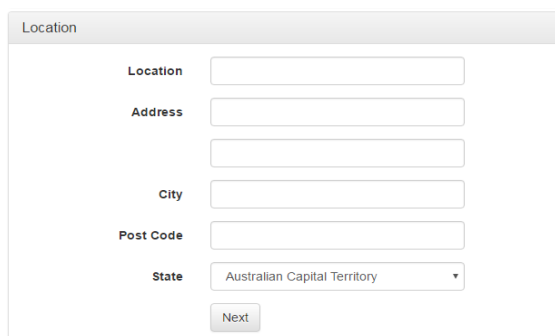


## Clients Details

- 5) Complete the client details as prompted  
*TIP: if they are not part of an organisation leave blank*
- 6) Upload Client Image - click either client, “accept” or “decline” photograph. If accept take photo -this is now the clients profile picture, if decline move on to next section.
- 7) Click “Next” when complete and the system will automatically move you to the next tab.

**Location – this is the location where the interview is taking place.**

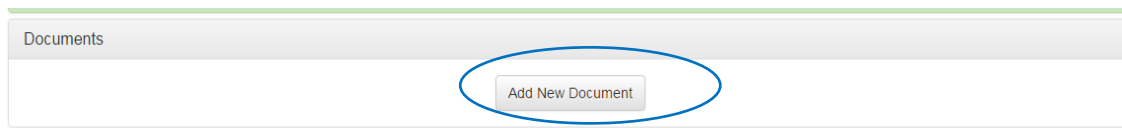
- 8) Complete location where the interview is being held as prompted – click “Next”



## Documents

Each verification is required to meet the General Registrar categories.

- 9) Click on **“Add New Documents”**



The screenshot shows the top of the 'Documents' tab. A grey header bar contains the word 'Documents'. Below it, a white box contains a button labeled 'Add New Document', which is circled in blue.

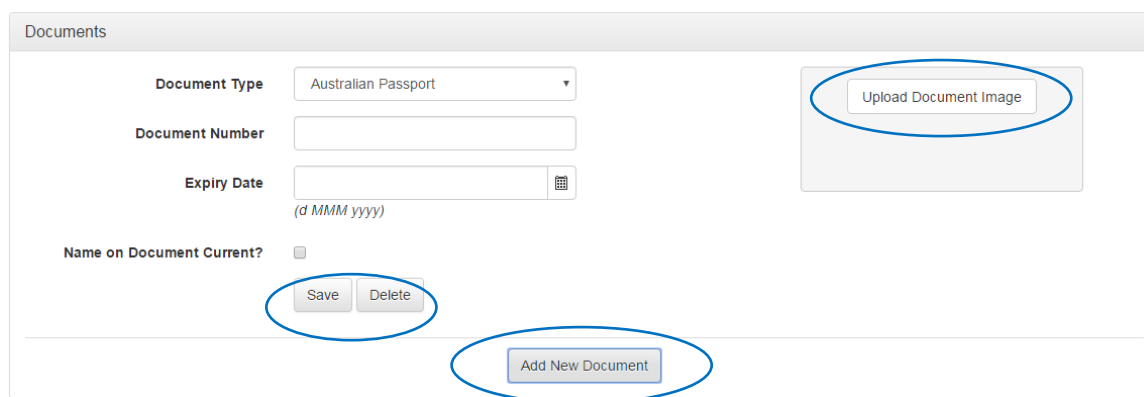
- 10) Chose the document type – click on the down arrow to chose what document you are verifying. and complete the details of that document as prompted and click **“Save”**

*TIP: always take the photo first*

*TIP: when entering date click on the Month/Year and it will scroll to change by years*

*TIP: always press save*

*TIP: there is the ability to write **notes** at the appointment/interview – the button to click on is in the top right corner of the interview details form.*



The screenshot shows the 'Documents' form. It has fields for 'Document Type' (set to 'Australian Passport'), 'Document Number', 'Expiry Date' (with a calendar icon), and a checkbox for 'Name on Document Current?'. To the right is an 'Upload Document Image' button. At the bottom are 'Save' and 'Delete' buttons, and at the very bottom is an 'Add New Document' button. The 'Save', 'Delete', and 'Add New Document' buttons are circled in blue.

- 11) Once saved – click **“Add New Document”**

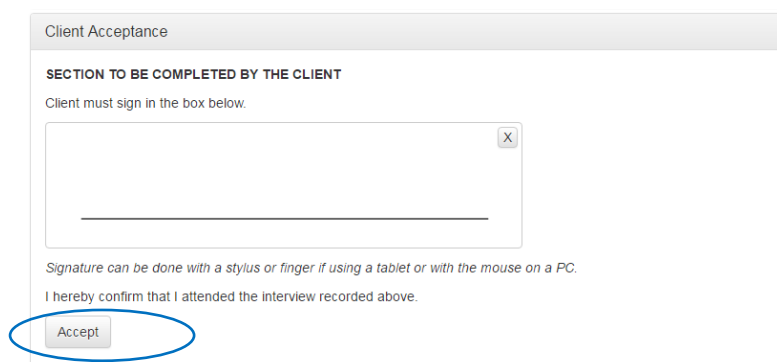
- 12) Keep adding documents to meet legislation. **\*\*It is the verifiers discretion what documents to upload see appendix of categories of verification documents.**

*Tip: If the tab has not changed to green then your documentation is incomplete*

- 13) Once all documents have been added click on the **“Client Acceptance”** tab.

## Client Acceptance

Instruct the client to sign in the box and then click the **“Accept”**.



The screenshot shows the 'Client Acceptance' form. It has a section titled 'SECTION TO BE COMPLETED BY THE CLIENT' with the instruction 'Client must sign in the box below.' Below this is a large rectangular box for a signature. Below the box is the text 'Signature can be done with a stylus or finger if using a tablet or with the mouse on a PC.' and 'I hereby confirm that I attended the interview recorded above.' At the bottom is an 'Accept' button, which is circled in blue.



*TIP: The tabs turns green and a tick can be seen when completed correctly. Check this before moving to submit.*

### Interview Details

Notes (2)

Client	✓
Location	✓
Documents	Category 1 ✓
Client Acceptance	✓
Submit	

### Submit tab

To finalise the verification of identity interview click on verification complete and submit the interview. See below if you cannot complete the certificate.

*N.B. once submitted for security reasons you cannot change the information and will be denied access to the data*

The following page will appear once you submit the interview giving you 3 options:

- 1) Download the certificate
- 2) Email certificate and it will send a copy of the certificate to your email address and the verifiers email.

The VOI interview is now complete

## AUTHORISATION TAB

### STEPS TO COMPLETE CLIENT AUTHORISATION

#### Create a new client authorisation appointment

There are 2 ways to do a client authorisation.

- 1) Once you submit the verification of identity forms the program will automatically prompt you to complete the client authorisation form if required.
- 2) Using the authorisation tab by setting up an appointment

#### OPTION 1: Client authorisation – straight from VOI

Once you complete the verification of identity interview the TrueID software will automatically prompt you to complete the client authorisation form if required.

- 1) Click on the **“New Authorisation”**

The screenshot shows the TrueID\_Demo interface. At the top, there's a navigation bar with 'TrueID\_Demo TrueID', 'Appointments', 'Authorisations', 'DemoA', and 'Log Off'. The main content area is titled 'Interview Submitted' and includes a 'Back to Appointments' button. Below this, a message states: 'Your interview has been submitted successfully. Use the download button below to obtain a copy of your certificate or send a copy to your account's email address and the organisation's owner(s).' There are two buttons: 'Download Certificate' and 'Email Certificate'. Further down, under the heading 'Authorisation Form', a message says: 'If the client requires an Authorisation form, use the Create New Authorisation button below to go a new Authorisation page.' The 'Create New Authorisation' button is circled in blue.

#### OPTION 2: Client authorisation – using the authorisation tab

- 1) Click on the **authorisation tab** and
- 2) Click **“create new authorisation”**

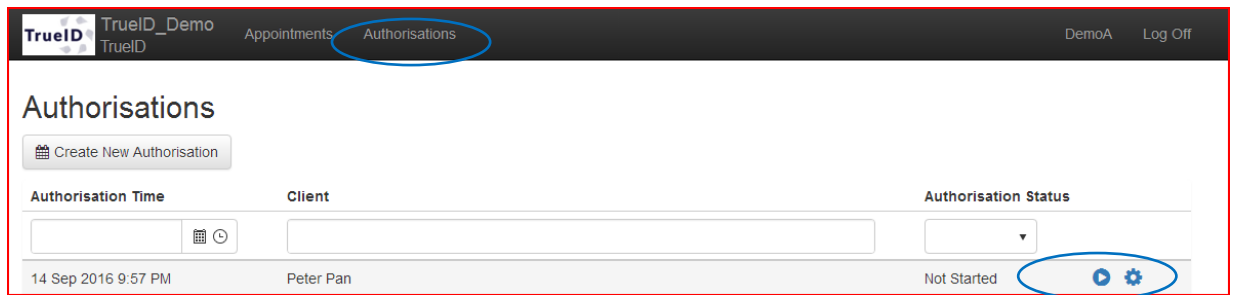
The screenshot shows the TrueID\_Demo interface with the 'Authorisations' tab selected in the navigation bar. The main content area is titled 'Authorisations' and includes a 'Create New Authorisation' button, which is circled in blue. Below this, there's a table with columns: 'Authorisation Time', 'Client', and 'Authorisation Status'. The 'Authorisation Time' column has a date and time picker. The 'Client' column has a text input field. The 'Authorisation Status' column has a dropdown menu.

- 3) Complete the questions as prompted

#### Create Authorisation

The screenshot shows the 'Create Authorisation' form. It has a 'Back' button at the top. Below it, there's a dropdown menu for 'Agent' with 'Greg Cocks' selected. There's a text input field for 'Client'. At the bottom, there's a 'Create' button and a 'Back to List' link.

- 3) Click to open the Authorisation tab as the newly created appointment will be in the list

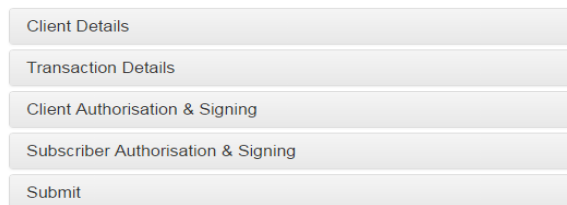


- 4) Click on the play button  to begin the authorisation.

### Begin the Authorisation Certificate – Details Page

There are 5 tabs to complete in this form for a certificate to be populated.

#### Client Authorisation

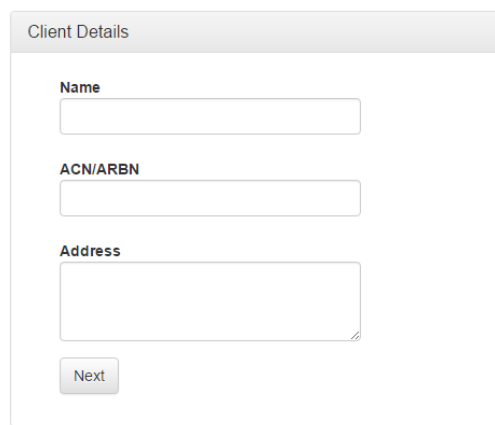


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### Client details

- 1) Complete client details as prompted.
- 2) If no ABN leave blank
- 3) Click “Next”

#### Client Authorisation



## Transaction Details

- 4) Complete the transaction details as prompted
- 5) Click **“Next”**

Transaction Details

Authority Type

☒ Specific Authority ☐ Standing Authority ☐ Batch Authority

Property Address

Land Title Reference

Conveyancing Transaction

☐ Transfer ☐ Mortgage ☐ Caveat

☐ Priority / Settlement Notice ☐ Discharge / Release of Mortgage ☐ Withdraw Caveat

☐ Other

Additional Instructions

Next

## Client Authorisation and Signing

- 6) Have your client sign where indicated
- 7) Complete the date, name and capacity
- 8) Click **“Next”**

Client Authorisation & Signing

Signature

Signature can be done with a stylus or finger if using a tablet or with the mouse on a PC.

Date

16 Jul 2016

(d MMM yyyy)

Client Name

Capacity

Next

## Subscriber Authorisation and Signing

This tab relates to the person who is conducting the interview – the verifier/ or the agent and the company they are representing.

9) Complete details as listed

10) Click “Next”

Subscriber Authorisation & Signing

Name

ACN/ARBN

Address

Signature

X

Signature can be done with a stylus or finger if using a tablet or with the mouse on a PC.

Date

1 Sep 2016

(d MMM yyyy)

Signatory Name

Simon Agent

Capacity

Next

## Submit

Check all the tabs are green and ticks appear at the far right

### Client Authorisation

Client Details	✓
Transaction Details	✓
Client Authorisation & Signing	✓
Subscriber Authorisation & Signing	✓
Submit	

11) Click “Submit” tab

*N.B. once submitted for security reasons you cannot change the information and will be denied access to the data*

12) Click on “**Submit Authorisation**” - It will ask you for confirmation – click **OK**.

Submit

Submit Authorisation

The following page will be displayed giving you 2 options for your VOA certificate.

- 1) Chose to Download the Authorisation certificate onto your device
- 2) Email a copy of the Authorisation Certificate to your account's email address and the organisation's owner(s).

Your authorisation has been submitted successfully.

Use the download button below to obtain a copy of your authorisation or send a copy to your account's email address and the organisation's owner(s).



Download Authorisation



Email Authorisation

The VOA interview is now complete

## WHAT TO DO IF YOU CAN'T COMPLETE THE INTERVIEW PROCESS

If one of the sections isn't completed and there no green tick you can proceed and produce VOI & VOA certificates. However we recommend you enter **Notes** to provide an explanation to why the section was unable to be sufficiently completed. This evidence and recording may be vital should you be audited.

### Interview Details

Notes

Client

Location

Documents

Client Acceptance

Submit


## STEPS TO CHANGE THE TIME OF A VOI APPOINTMENT or AUTHORISATION

You will need to change the appointment time to reflect the right time on the VOI and VOA Certificate. To do this,

- 1) open the relevant tab i.e. appointment/authorisation


The screenshot shows the TrueID Demo interface. At the top, there is a navigation bar with 'Appointments' and 'Authorisations' tabs. The 'Appointments' tab is selected and circled in blue. Below the navigation bar, the 'Appointments' section is visible. It includes a 'Create New Appointment' button and a table with columns for 'Appointment Time', 'Client', and 'Interview Status'. The first row of the table shows '15 Sep 2016 10:00 AM', 'Peter Pan', and 'Not Started'. There are also icons for a calendar and a clock next to the appointment time field.

2) Search for the client by putting their name and press enter

3) Click on the  icon

## Appointments

 Create New Appointment

Appointment Time	Client	Agent	Interview Status
<input type="text"/> 	<input type="text"/>	<input type="text"/>	<input type="text"/>
20 Jul 2016 4:00 AM	Test User4	Simon Agent	In Progress




4) The following page will open change the date and time of appointment and click “Save”

## Edit Appointment

[Back](#) [View Interview](#) [Re-open Interview](#) [Conduct Authorisation](#)

Interview Status In Progress

Appointment Time    
(d MMM yyyy hh:mm AM/PM)

Agent

First Name Test

Last Name User4



## USERNAME TAB

The user name tab displays all your personal information, manages your password and stores your electronic signature.



## SETTING UP YOUR PERSONAL PROFILE

Click in the boxes to complete all the sections on this page as promoted and check that your signature loads as this signature will automatically appear on the certificates. As shown below and click **“Save”**.

### Manage

Change Password

Email

First Name

Last Name

Address

City

Post Code

State

Phone Number

Signature

Save

## CHANGING MY PASSWORD

- 1) Open the username tab
- 2) Click **“change password”**
- 3) Complete as promoted

*TIP: your password must be at least 6 characters long and must include 1 number and 1 uppercase letter*