



# TrueID

**VOI & VOA Software System**

**Verifier/Licensee  
User Guide**

**November 2016**

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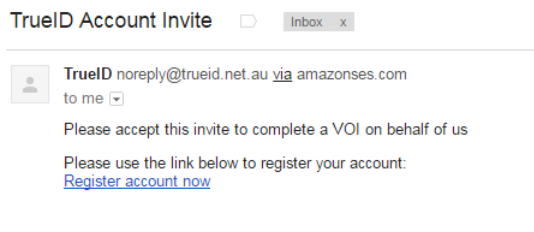
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## ACCOUNT SET UP

### SETTING UP AN ACCOUNT FOR A LICENSEE/VERIFYER

Once you have sent back a signed copy of the license agreement within 3 working days you receive an invitation to receive to set up your account. Follow these steps to set up your account.

- 1) Check your email for **'TRUE ID Account invite'** by email – use the link in that email to **register your account**



- 2) Complete the registration questions as prompted  
*TIP: Make your username your first and last name e.g. John Doe*  
*TIP: your password must be at least 6 characters long and must include 1 number and 1 uppercase letter*

#### Register

Create a new account.

First Name	<input type="text"/>
Last Name	<input type="text"/>
Username	<input type="text"/>
Email	<input type="text"/>
Password ⓘ	<input type="password"/>
Confirm password	<input type="password"/>
Phone Number	<input type="text"/>
Address	<input type="text"/>
City	<input type="text"/>
Post Code	<input type="text"/>
State	<input type="text" value="Australian Capital Territory"/>
<input type="button" value="Register"/>	

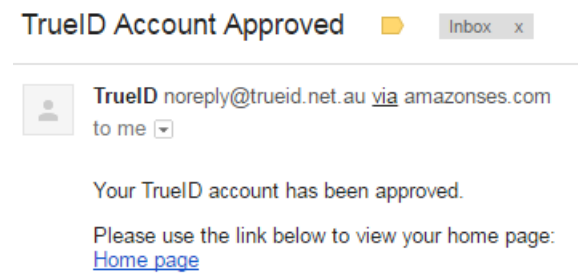
- 3) Click **"register"** – the following page will be displayed  
*TIP: it could take up to 3 days to get your approval email*

#### Account Approval Required

Thank you for registering your account. Your account requires approval before it will be active.  
A notification has been sent to the Administrators. You will be notified by email when the account is approved for use.

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Once you receive an email to state your TrueID Account has been approved and will prompt you to the **'home page'**.



4) Your account is now registered and ready to login

### LOGGING IN TO TRUE ID

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*

*TIP: Your username should be your name i.e. John Doe*

*TIP: If there is no activity on the system in 30minutes you will automatically be logged out*

A screenshot of the TrueID Portal login page. The page has a dark header with the TrueID logo and navigation links: Dashboard, Appointments, Authorisations, Users, Organisation, Logs, DemoV, and Log Off. The main content area is light gray and contains the TrueID logo on the left and a login form on the right. The login form includes a welcome message, fields for Username and Password, a Log in button, and a link for "Forgot your password?". The footer shows "© 2016 - TrueID".

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

## TRUE ID MAIN PAGE OVERVIEW

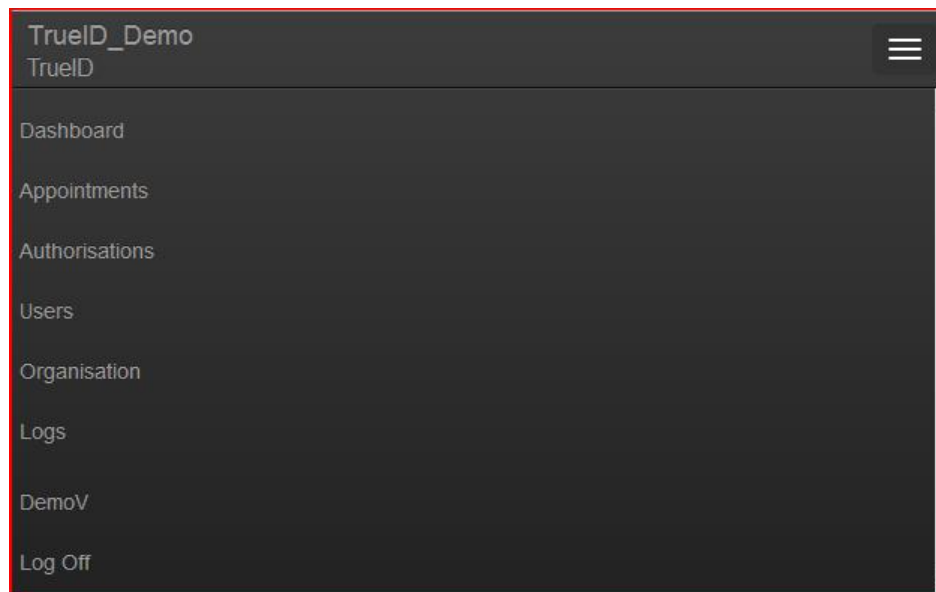
Once you are logged in the following page will appear as the licensee. There are 8 main functions across the top; the following is a brief overview of functions that you have access to as a verifier. The webpage will slightly vary to a tablet and a smart phone device as shown in the diagrams below.

**NB: please note once you upload your company logo it will appear in the left hand side**

### Computer View



### Tablet or Smart Phone View



## 1: Dashboard

The **Dashboard** tab will open automatically every time you log onto TrudID. There are two graphic representations

- 1) Graph of all interviews conducted by date
- 2) Graph of interviews conducted by any appointed agents

## 2: 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.

## 3: 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.

## 4: Users

The **User** tab lists all verifier's and identity agents within your organisation. This is the tab you will use to add a new user to your license. See more in the user guide on the functions in the users tab.

## 5: Organisation

The **Organisation** tab displays your full company details including the ability to personalise with your logo. The details in this page are transferred onto certificates. See more in the user guide on the functions in the organisation tab.

## 6: Logs

The **Log** tab displays all log ins by all users within an organisation. As verifier/business/licensee you would use this page as quality control and audit system. See more in the user guide on the functions in the logs tab.

## 7: 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.

## 8: Log Off

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

## DASHBOARD TAB

The **Dashboard** tab will open automatically every time you log onto TruID. There are two graphic representations

- 1) Graph of all interviews conducted by date
- 2) Graph of interviews conducted by any appointed agents

The dashboard also offers the user to increase or decrease the number of days to view in the graphs (the last 1 year, 30 days or 7 days}. Choose your option then click 'apply'.

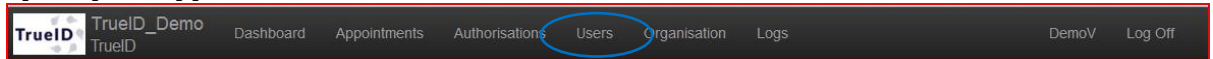


## APPOINTMENT TAB

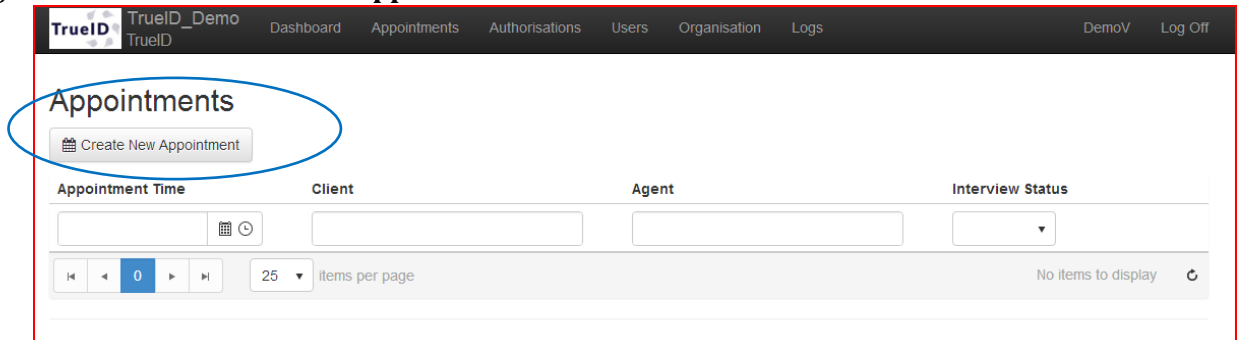
### STEPS TO COMPLETE A VERIFICATION/INTERVIEW

#### Create a new appointment

- 1) Open up the appointments tab



- 2) Click on the “Create New Appointment”




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

#### Create Appointment

[Back](#)

---

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

**Agent**

**First Name**

**Last Name**

[Create](#)

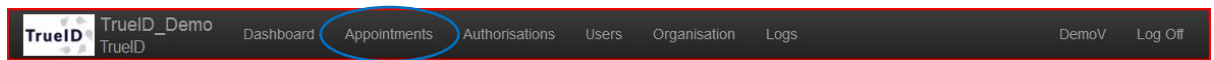
[Back to List](#)

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



## Begin the verification – Interview Details Page

- 1) Open the appointment tab



- 2) Find the client in the appointment list and press the play button

### Appointments

Create New Appointment

Appointment Time	Client	Agent	Interview Status
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
22 Aug 2016 5:30 PM	Test Case	Greg Cocks	Not Started

- 3) 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.

### Interview Details

Notes

Client
Location
Documents
Client Acceptance
Submit

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## Clients Details

- 4) Complete the client details as prompted  
*TIP: if they are not part of an organisation leave blank*
- 5) 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.
- 6) 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.

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

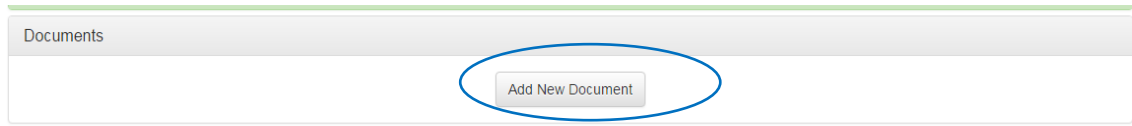
Location

Location	<input type="text"/>
Address	<input type="text"/>
	<input type="text"/>
City	<input type="text"/>
Post Code	<input type="text"/>
State	<input type="text" value="Australian Capital Territory"/>
	<input type="button" value="Next"/>

## Documents

Each verification is required to meet the General Registrar categories.

- 8) Click on **“Add New Documents”**



The screenshot shows a header bar with the title 'Documents'. Below the title, there is a button labeled 'Add New Document' which is circled in blue.

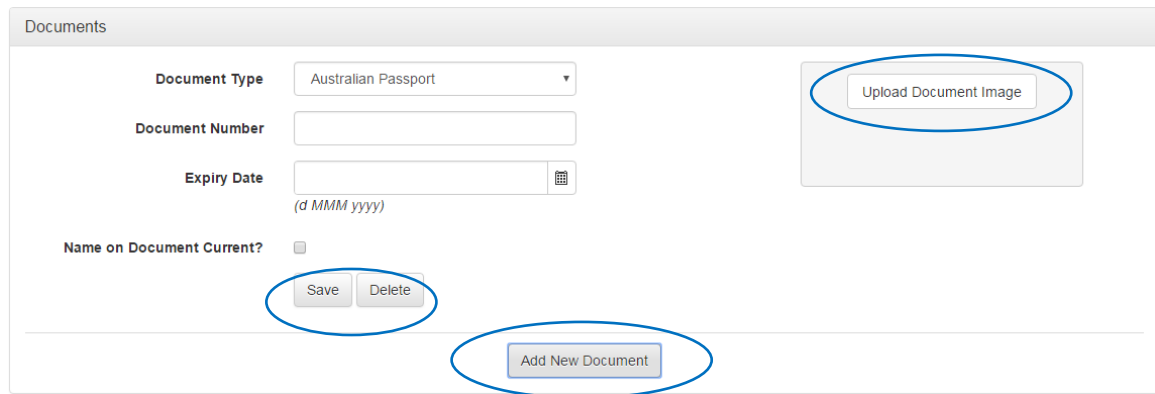
- 9) Chose the document type – click on the down arrow to chose what document you are verifying. and complete the details of that document as prompted and click **“Save”**

*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 a form for adding a new document. It includes fields for 'Document Type' (set to 'Australian Passport'), 'Document Number', and 'Expiry Date' (with a calendar icon). There is a checkbox for 'Name on Document Current?'. On the right, there is a button 'Upload Document Image'. At the bottom, there are buttons 'Save' and 'Delete' circled in blue, and an 'Add New Document' button also circled in blue.

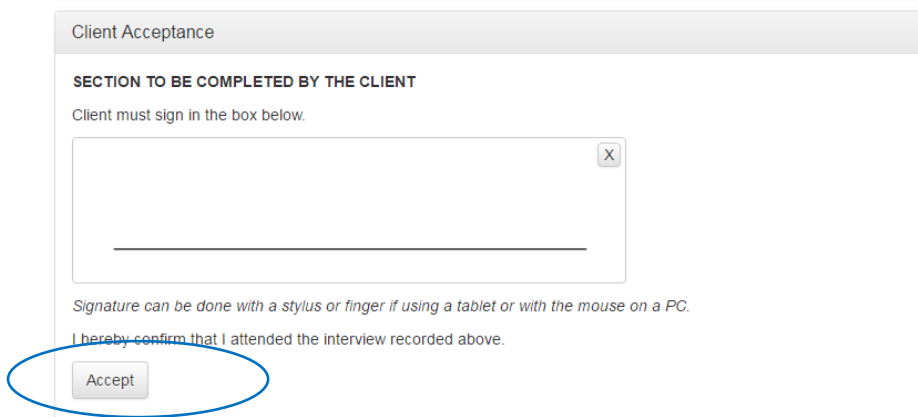
- 10) Once saved – click **“Add New Document”**

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

- 12) 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' section. It includes a heading 'SECTION TO BE COMPLETED BY THE CLIENT' and a note 'Client must sign in the box below.' Below this is a large rectangular box for a signature. At the bottom, there is a line of text 'I hereby confirm that I attended the interview recorded above.' and an 'Accept' button 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.

Submit

☐ Verification completed  
☒ Verification not completed

Save Interview

Submit Interview

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

- 1) Download a one page certificate (e.g. for use by conveyancers)
- 2) Download a detailed certificate include all the documented evidence (e.g. use by financial institutions)
- 3) Email certificate and it will send a copy of the certificate to your account's email address and the organisation's owner(s) note; not a detailed certificate

TrueID

TrueID\_Demo  
TrueID

Dashboard

Appointments

Authorisations

Users

Organisation

Logs

DemoV

Log Off

### Interview Submitted

Back to Appointments

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).

Download Certificate

Download Detailed Certificate

Email Certificate

#### Authorisation Form

If the client requires an Authorisation form, use the Create New Authorisation button below to go a new Authorisation page.

Create New Authorisation

The VOI 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

Client
Location
Documents
Client Acceptance
Submit

Notes 

---

## STEPS TO CHANGE THE TIME OF AN APPOINTMENT


---

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

- 1) Search for the client by putting their name and press enter
- 2) Click on the  icon

### Appointments

 Create New Appointment


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

- 3) 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

[Save](#)

## 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. The top navigation bar includes 'Dashboard', 'Appointments', 'Authorisations', 'Users', 'Organisation', and 'Logs'. The main content area is titled 'Interview Submitted' and contains 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 three buttons: 'Download Certificate', 'Download Detailed Certificate', and 'Email Certificate'. Below these buttons, the 'Authorisation Form' link is circled in blue. At the bottom, there is a 'Create New Authorisation' button.

#### 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 top navigation bar. The main content area is titled 'Authorisations' and contains a 'Create New Authorisation' button, which is circled in blue. Below this button is a table with columns: 'Authorisation Time', 'Client', 'Agent', and 'Authorisation Status'. The 'Authorisation Time' column has a date and time picker. The 'Client' and 'Agent' columns have text input fields. The 'Authorisation Status' column has a dropdown menu. At the bottom, there is a pagination bar showing '25 items per page' and 'No items to display'.

- 3) Complete the questions as prompted

### Create Authorisation

**Agent**

**Client**

[Back to List](#)

- 4) Click to open the Authorisation tab and the newly created appointment will be in the list

TrueID\_Demo TrueID Dashboard Appointments **Authorisations** Users Organisation Logs DemoV Log Off

### Authorisations

Authorisation Time	Client	Agent	Authorisation Status
<input type="text" value="14 Sep 2016 8:16 PM"/>	<input type="text" value="Test Case"/>	<input type="text" value="Demo User"/>	<input type="text" value="Not Started"/>

- 5) Click on the play button  to begin the autorisation.

## 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

**Name**

**ACN/ABN**

**Address**

## 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

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

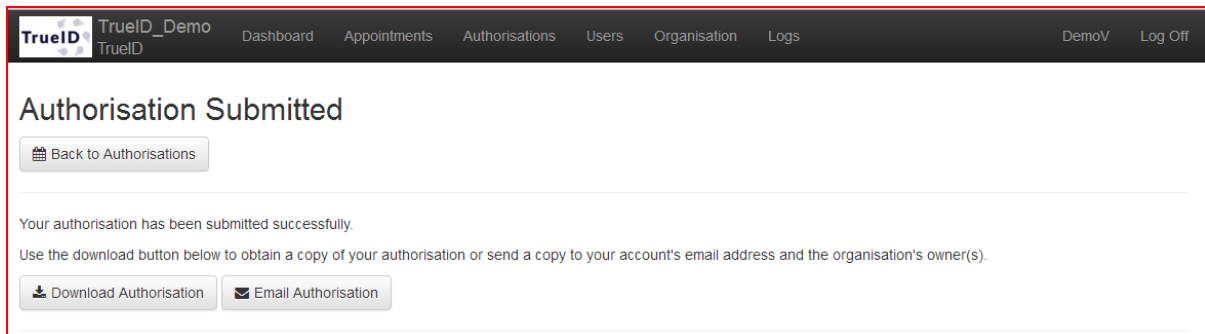
Submit

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).



The VOA interview is now complete

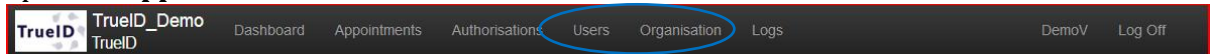
## HOW TO ACCESS THE VOI & VOA CERTIFICATE



### Access certificates immediately at time of interview

Once you have completed the interview process for both VOI and VOA the following page will open – prompting you to either download or email the VOA and VOI certificate.

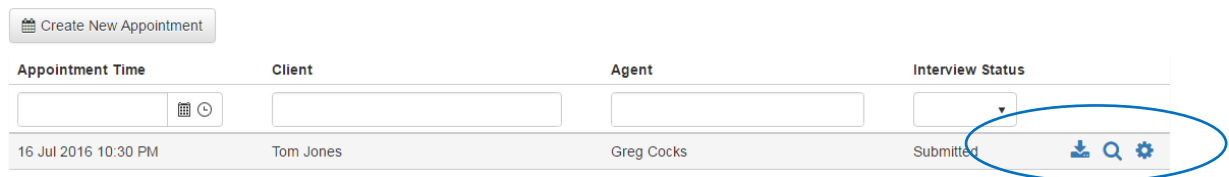
### To access the certificates at a later date from the system by:

- 1) Log in at <https://secure.trueid.net.au/>
- 2) Open the **Appointment tab** for VOI or the **Authorisation tab** for VOA



- 3) Find the client in the appointment list
- 4) Click the download button 
- 5) Or view on screen 

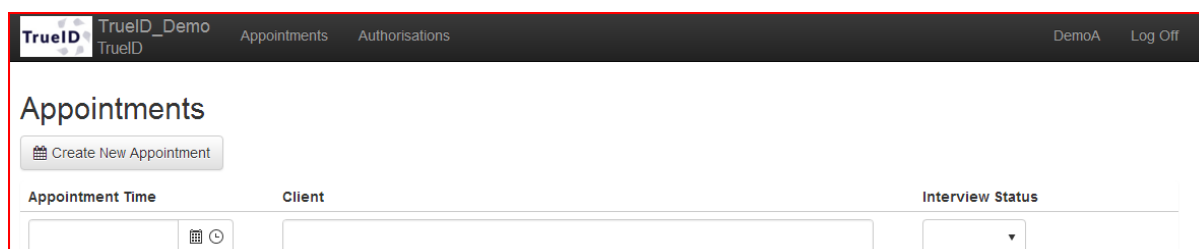
### Appointments



## USERS TAB

This is used when the licensee would like to set up an agent or add another verifier to their organisation.

An **agent has limited to capacity** with access to the appointments and authorisations tabs only.

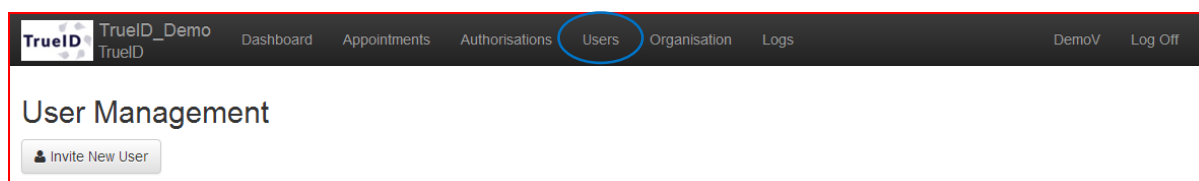
A screenshot of the TrueID web application interface. The top navigation bar includes the TrueID logo, 'TrueID\_Demo', 'TrueID', 'Appointments', 'Authorisations', 'DemoA', and 'Log Off'. The main heading is 'Appointments'. Below it is a 'Create New Appointment' button. There are three input fields: 'Appointment Time' with a calendar icon, 'Client' with a text input, and 'Interview Status' with a dropdown arrow.

A **verifier gives full access** to the system – this would be appropriate for senior staff or management who may oversee the use of the system.

As the licensee all VOI and VOA certificates will directly come to you by the email provided at subscription.

### ADDING A NEW USER: AGENT or VERIFIER

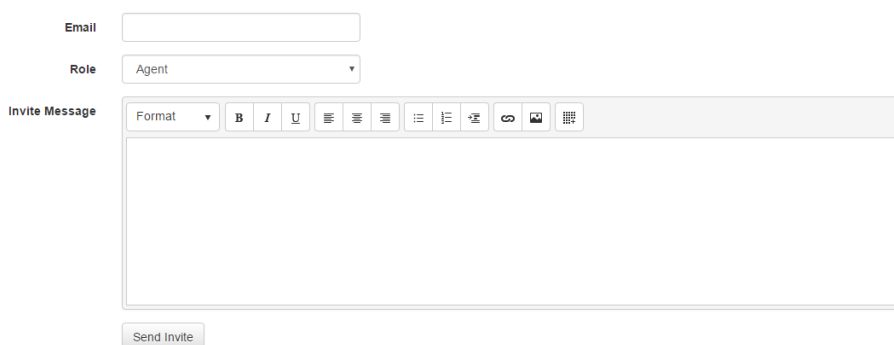
- 1) Click on the Users Tab
- 2) Click on – **“Invite User Tab”**

A screenshot of the TrueID web application interface showing the 'Users' tab. The top navigation bar includes the TrueID logo, 'TrueID\_Demo', 'TrueID', 'Dashboard', 'Appointments', 'Authorisations', 'Users' (highlighted with a blue circle), 'Organisation', 'Logs', 'DemoV', and 'Log Off'. The main heading is 'User Management'. Below it is an 'Invite New User' button.

- 3) Enter the email address of the person your inviting
- 4) Select the Role – drop down bar (Agent or Verifier)
- 5) Write a personalized message for the invitee to receive with the TrueID Account Invite.

Invite User

[Back](#)

A screenshot of the 'Invite User' form. It has an 'Email' input field, a 'Role' dropdown menu set to 'Agent', and a large text area for the 'Invite Message'. The text area has a rich text editor toolbar with options like Bold, Italic, Underline, Bulleted List, Numbered List, Indent, Outdent, Link, and Image. A 'Send Invite' button is at the bottom.

- 6) Click **“Send Invite”**
- 7) The new user/ agent will receive an invitation email and be promoted to register an account.
- 8) You as verifier will receive an email to confirm the account has been activated and to authorisation their account.
- 9) At this point you should send the agent a copy of the “Agents User Guide”.

Once they are registered they will appear in the user tab and status will indicate **invited** until they accept the invitation, they will then move to **pending** approval, to being **active** and will remain that way until you change their status to **inactive**.

## WHAT IF THE NEW USER DID NOT GET AN EMAIL – RESEND


The system allows you to resend an invitation to a new user. To do this;

- 1) Login in
- 2) Click on the Users tab

### User Management

[Invite New User](#)

Username	Name	Email	Role	Status
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
		sonya.sangster@trueid.net.au	Agent	Invited

- 3) Find the user in the list – in the status it should indicate “invited”
- 4) Click on the  - the following page will appear

**Manage Invite**

[Back](#) [Resend Invite](#) [Delete Invite](#)

















































Invite Link: <https://secure.trueid.net.au/Account/Register?ac512195-4410-4c79-9303-05e7e0664f1>

Email:


Role:

Invite Message: 

Format

**B** **I** **U**                                                  

## To change/manage a user

- 1) Click on the  and the following screen will appear.
- 2) You can chose to disable the account
- 3) Change any details of agent/verifier

### Manage User

---

Status

Active

Username

Email

Role

First Name

Last Name

Phone Number

Address

City

Post Code

State

Save

Password

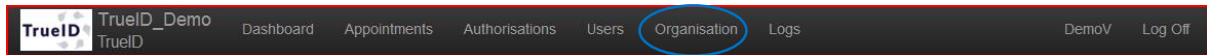
Confirm password

Reset Password

## ORGANISATION TAB

The **Organisation** tab displays your full company details including the ability to personalise with your logo. The details in this page are transferred onto certificates – check for 100% accuracy.

- 1) Click on the Organisation tab



- 2) Complete the details on the page as prompted.

*TIP: the company logo is required in a jpeg format*

Status	Activated 11 Apr 2016
Name	<input type="text"/>
Contact Name	<input type="text"/>
Contact Email	<input type="text"/>
Alternative Email	<input type="text"/>
Phone Number	<input type="text"/>
Fax	<input type="text"/>
ABN	<input type="text"/>
Website	<input type="text"/>
Address	<input type="text"/> <input type="text"/>
City	<input type="text"/>
Post Code	<input type="text"/>
State	<input type="text" value="South Australia"/>
	<input type="button" value="Save"/>

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Logo	<input type="button" value="Upload Organisation Logo"/>
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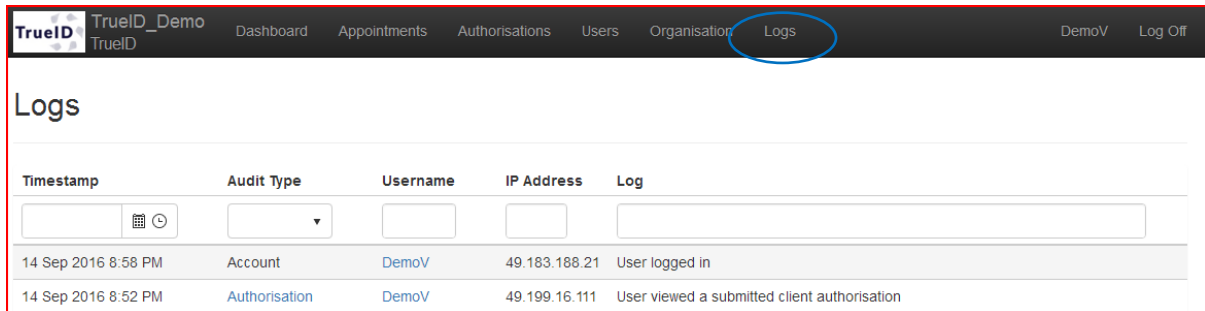
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## LOGS TAB

The **Logs** tab displays all log ins by all users within an organisation. As verifier/business/licensee you would use this page as quality control and audit system.

This page allows you to view your users and a log of their access and transactions to the system.

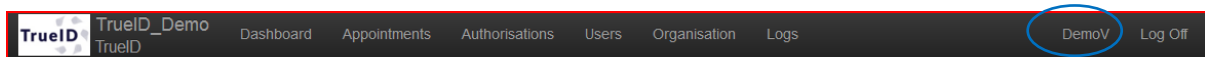
- 1) Open the log tab
- 2) Search by username
- 3) View their log profile



Timestamp	Audit Type	Username	IP Address	Log
14 Sep 2016 8:58 PM	Account	DemoV	49.183.188.21	User logged in
14 Sep 2016 8:52 PM	Authorisation	DemoV	49.199.16.111	User viewed a submitted client authorisation

## USERNAME TAB

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




TrueID_Demo	Dashboard	Appointments	Authorisations	Users	Organisation	Logs	DemoV	Log Off
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## 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	<input type="text"/>
First Name	<input type="text"/>
Last Name	<input type="text"/>
Address	<input type="text"/>
City	Adelaide
Post Code	<input type="text"/>
State	South Australia
Phone Number	<input type="text"/>
Signature	
<input type="button" value="Save"/>	

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## CHANGING MY PASSWORD

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- 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*

