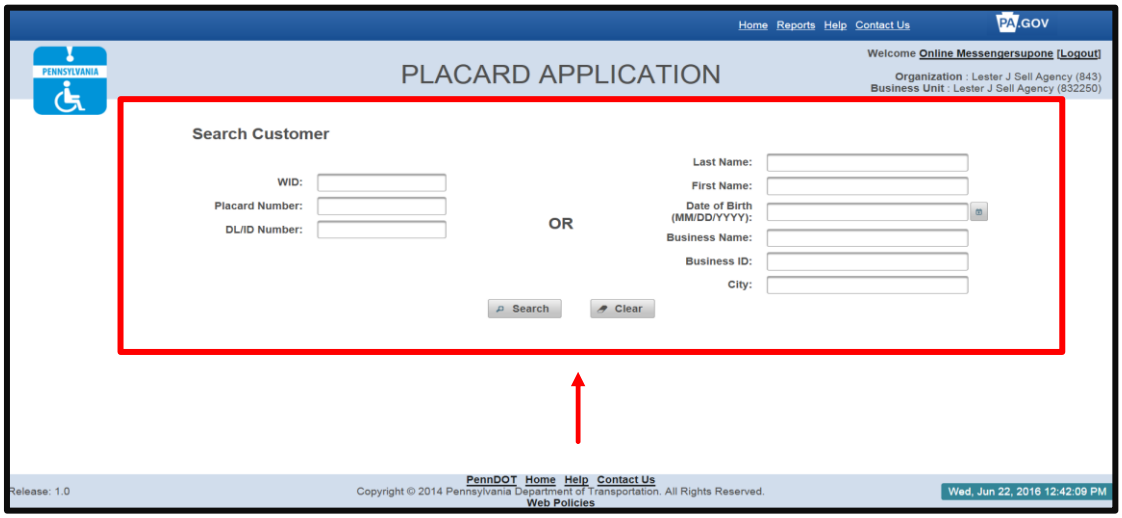
Individual Customer

New Placard Panel

“Temporary”

Enter Customer Information



NOTE: Before creating an Individual or Business Customer the User should do a comprehensive search of the customer to ensure that duplicate customers are not created.
Reminder:

- **Review applications prior to processing**
- **If the application is incomplete, return it to the customer and do not process the customer request.**

Enter Customer Information on the Placard Application's Home Page.

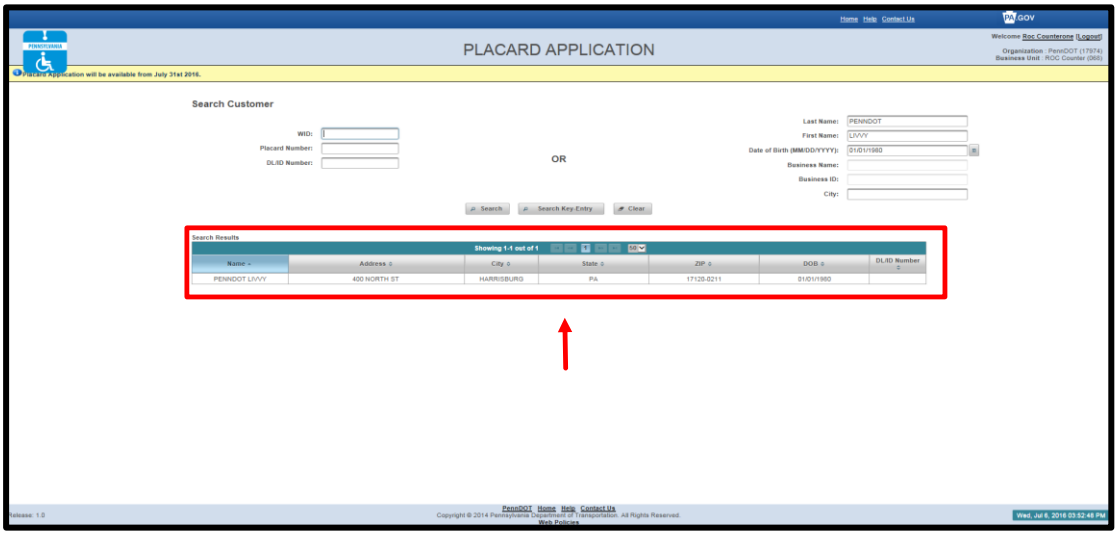
The following are search fields:

WID	Last Name
Placard Number	First Name
DL/ID Number	Date of Birth
Business Name	Business ID
City	

There are multiple ways to search and the search criteria could be any of the following.

[WID] or [Placard Number] or [DL/ID Number]
[Last Name, First Name and DOB] or [Business Name and Business ID]
[Last Name, First Name]
[Last Name, First Name, City]
[Last Name, City]
[Business Name]
[Business ID]
[Business Name and City]
[Business ID and City]

Select Customer Record

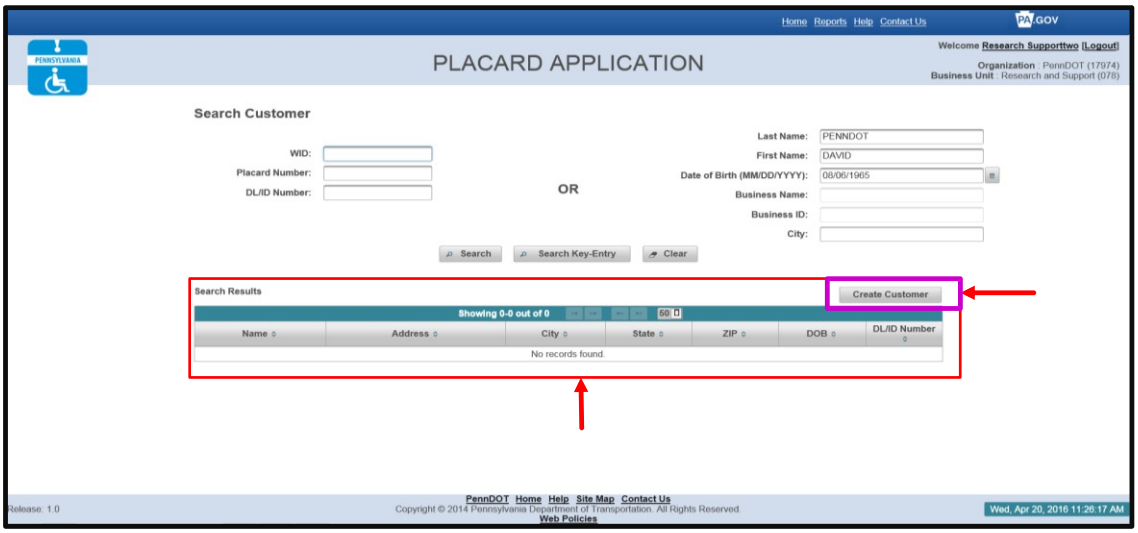


The customer's record will be displayed in the Search Results.

Review the customer information displayed on the screen to the application. **DO NOT ASSUME** that the customer displayed is the customer the Placard is being processed for.

If the customer's record is a match the User will hover over the customer name and click on the name and the Customer Record will be displayed.

Search – No Records Found

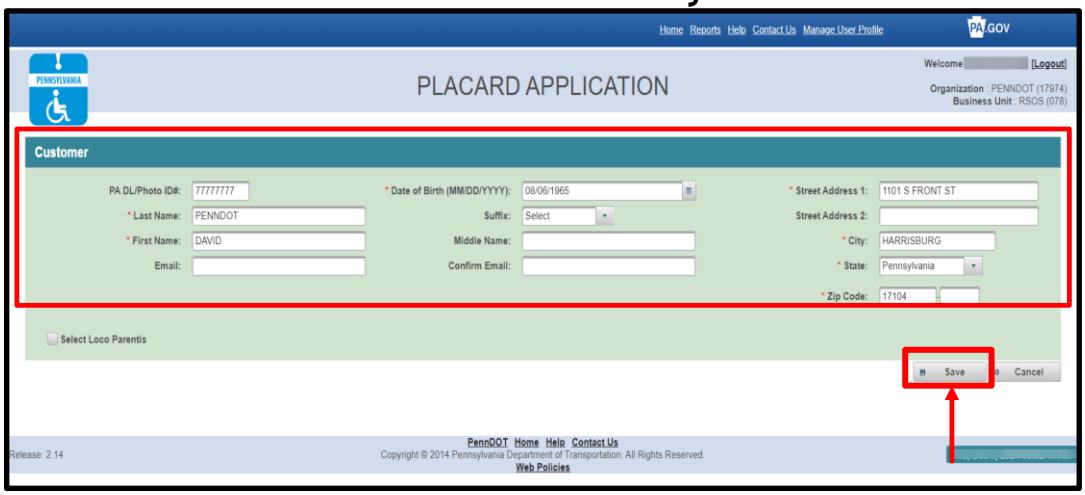


If the User receives the No Records Found result, the User should **Confirm** that the information entered for the search criteria matches the information on the application.

If the information matches, the customer can now be created.

Select Create Customer

DL/ID Number
Interface with DL&C System



The Customer Panel screen, enter all customer information as listed on the application. If the PA DL/Photo ID# is on the application it **MUST** be entered on the customer record.

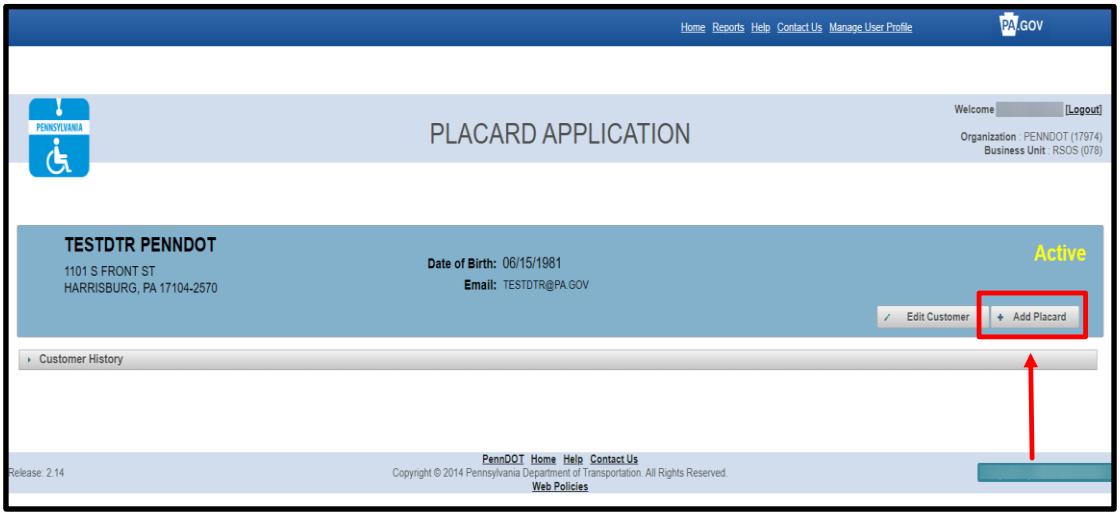
- Last Name, Suffix, First Name and Middle Name.
  NOTE: Online Messengers can correct the customer's name if the correction is a result of an error.
- An example of an acceptable customer name correction would be the name was entered as "Roert" and should have been entered as "Robert".
- An example of an unacceptable customer name correction would be the name was entered as "Mary" and the customer name correction would be "John". If this situation should arise send the application into DVS for additional review.
- Date of Birth.
- Address.

The User will be able to modify the information that was populated.

Step 1. If the information is correct, **Click Save**.

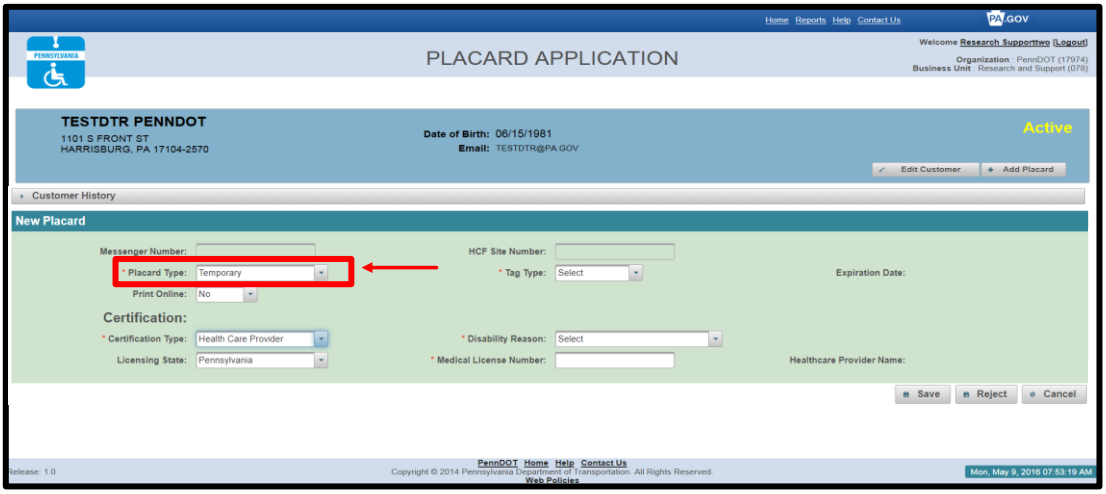
Proceed to Add Placard

Add Placard – Individual Customer



To process a Placard request for the Individual Customer click on “Add Placard”.

First Time Issuance – Individual Customer "Temporary"



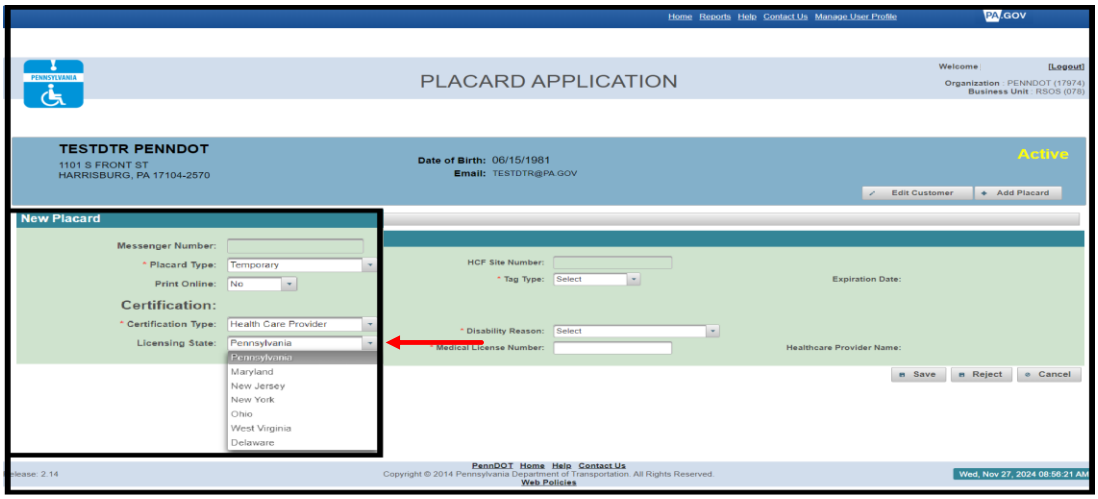
When the User selects Placard Type "Temporary" the following fields become available:

- Print Online is prepopulated with No.
- Certification Type is prepopulated with Health Care Provider.

  NOTE: When Temporary Placard Type is selected the only certification type available is Health Care Provider.
- Licensing State is prepopulated with Pennsylvania.
- Medical License Number.
- Healthcare Provider Name will be populated when the Medical License Number is entered.

See Licensing State.

First Time Issuance – Individual Customer "Temporary"

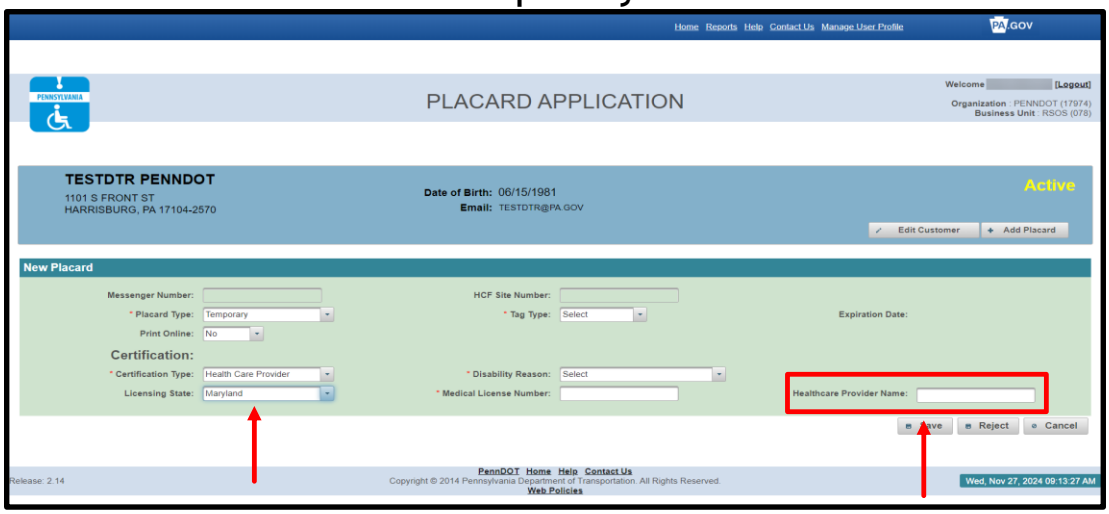


Under the Licensing State although it is prepopulated with Pennsylvania the employee does have the options to select the following:

- Maryland
- New Jersey
- New York
- Ohio
- West Virginia
- Delaware

Click on Maryland.

First Time Issuance – Individual Customer "Temporary"

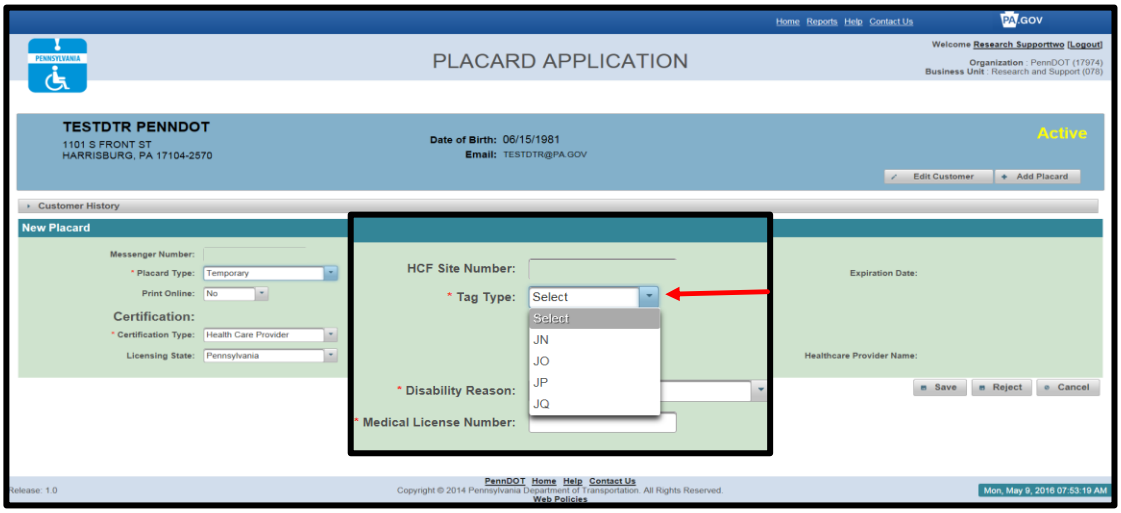


When the User selects another state other than Pennsylvania notice the Healthcare Provider Name now becomes a field that will need to have a name manually entered.

Click on Licensing State and reselect Pennsylvania.

Click Tag Type.

First Time Issuance – Individual Customer "Temporary"



Under Tag Type the User will have the following options but not all at one time.

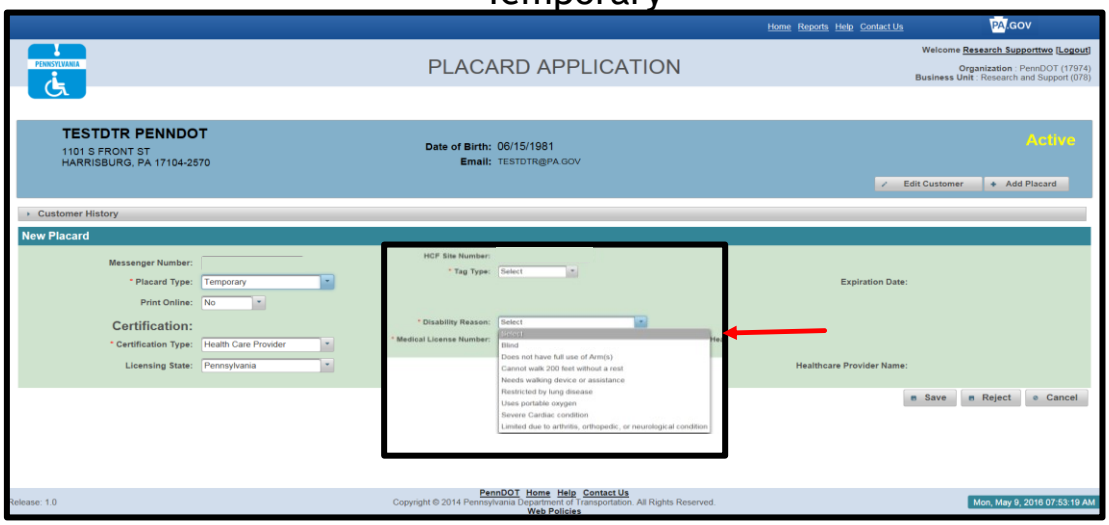
- JN
- JO
- JP
- JQ

The system shall only display active Tag Types available for selection based on the Placard Type entered. For example, if JN is the current Tag Type available, only JN will be displayed.

Depending on which Tag Type is selected the Expiration Date will be prepopulated with the expiration date.

Click on Disability Reason.

First Time Issuance – Individual Customer "Temporary"



Under Disability Reason the User will have the following options:

- Blind. **APPLICATION MUST BE SUBMITTED TO PennDOT.**
- Does not have full use of Arm(s)
- Cannot walk 200 feet without a rest
- Needs walking device or assistance.

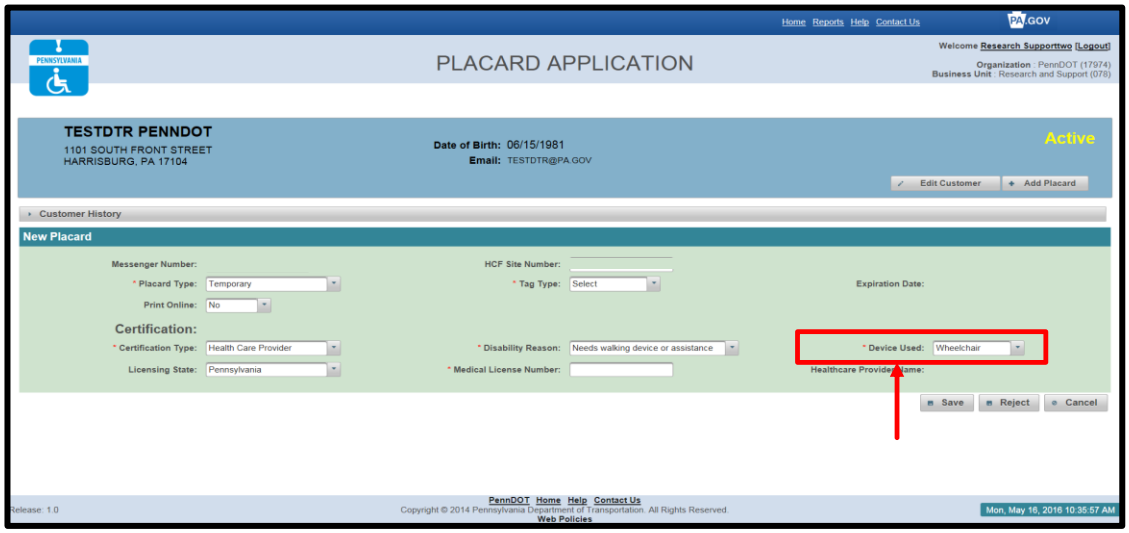
NOTE: If selected, the Device Used field will appear on the panel. The User will select the device the customer is using.

- Restricted by lung disease
- Uses portable oxygen
- Severe Cardiac condition
- Limited due to arthritis, orthopedic, or neurological condition

Select disability reason as listed on the MV-145A application.

Click on Needs walking device or assistance.

First Time Issuance – Individual Customer "Temporary"



When the User selects "Needs walking device or assistance" another field "Device Used" is displayed on the screen.

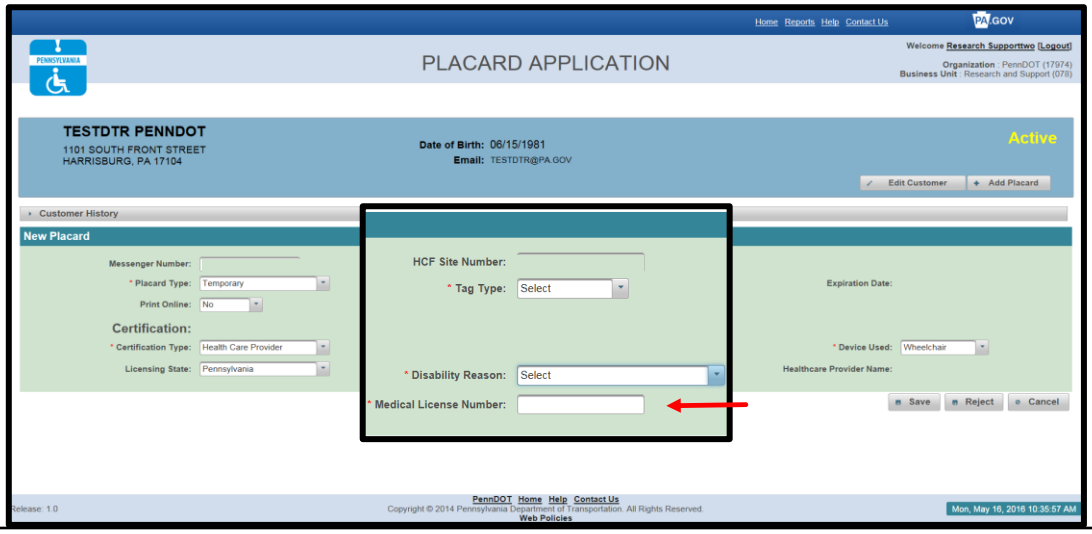
Under Device Used the User will have the following options:

- Wheelchair
- Walker
- Crutches
- Cane/Quad Cane
- Other

Click on Device Used to Select Device used as listed on the MV-145A application.

See Medical License Number

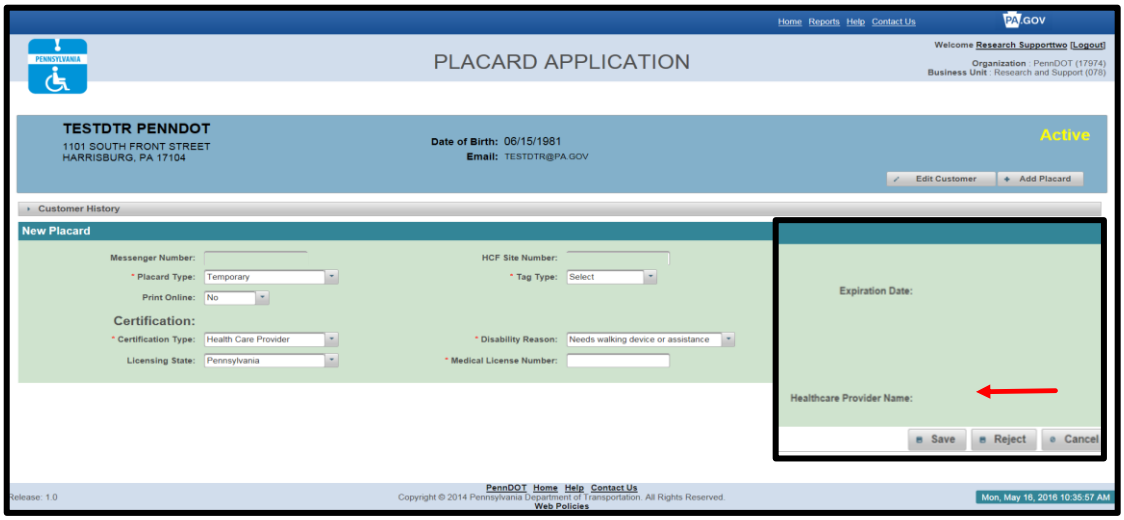
First Time Issuance – Individual Customer "Temporary"



The User will have to manually enter the Medical License Number that is found on the application.

See Health Care Provider Name

First Time Issuance – Individual Customer "Temporary"

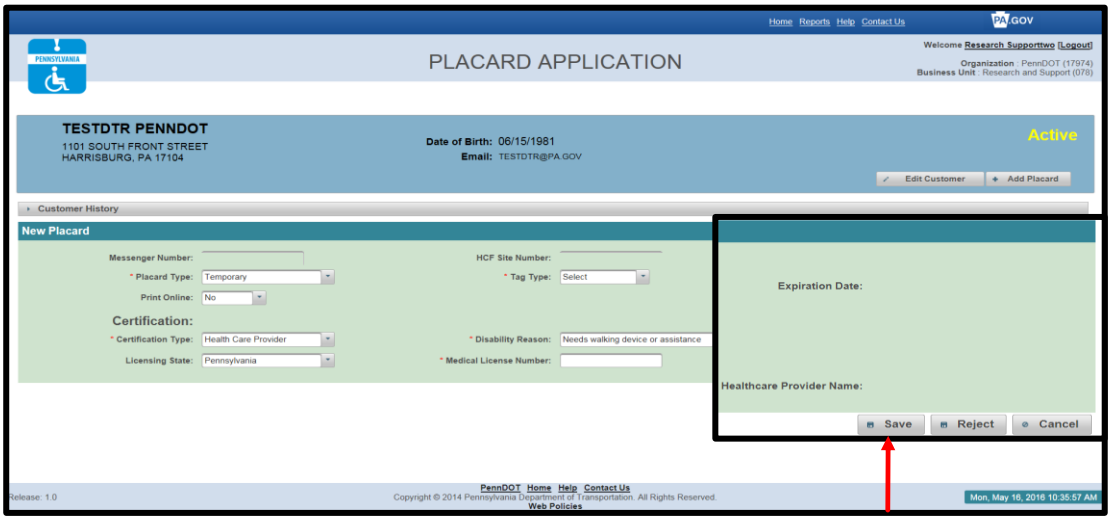


The Healthcare Provider Name will auto populate when the Medical License Number is entered and if the Licensing State is Pennsylvania. There is an interface with the Department of State that is updated regularly.

If the Licensing State is Maryland, New Jersey, New York, Ohio, West Virginia or Delaware a field will be displayed, and the User will be required to enter the Healthcare Provider Name.

See Save.

First Time Issuance – Individual Customer "Temporary"

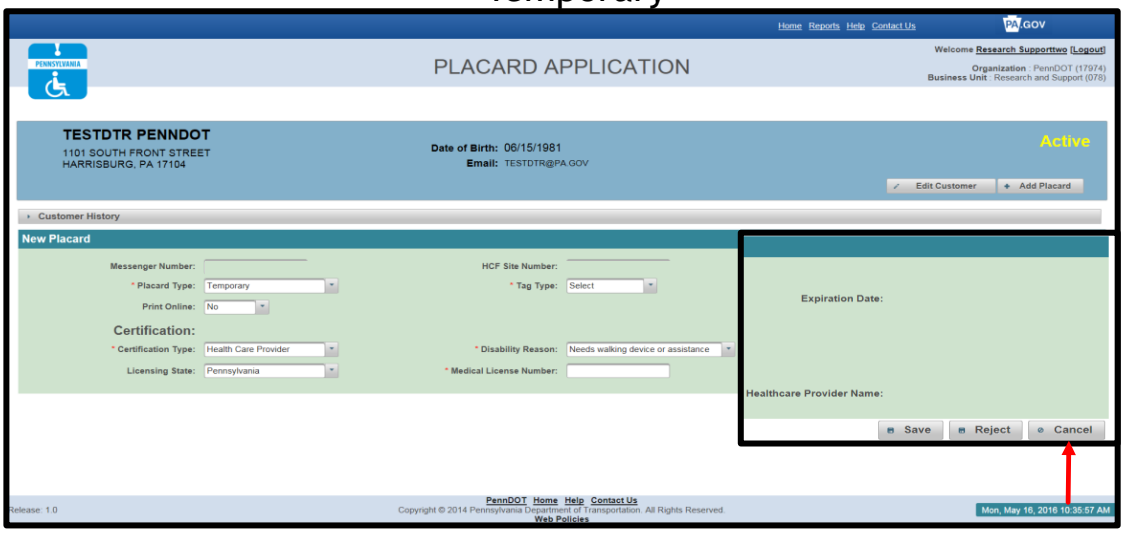


The Save button is used when all the required fields are entered and the application has been reviewed and approved for processing.

The Individual Customer would then be assigned a Placard Number and this information will show under the Placard Section.

The Placard and ID card will be mailed from PennDOT within 3 business days.

First Time Issuance – Individual Customer "Temporary"



The Cancel button is used to back out of the transaction. If the transaction is canceled no information will be saved to the customer's record.

EDIT CUSTOMER ID CARD REPLACEMENT

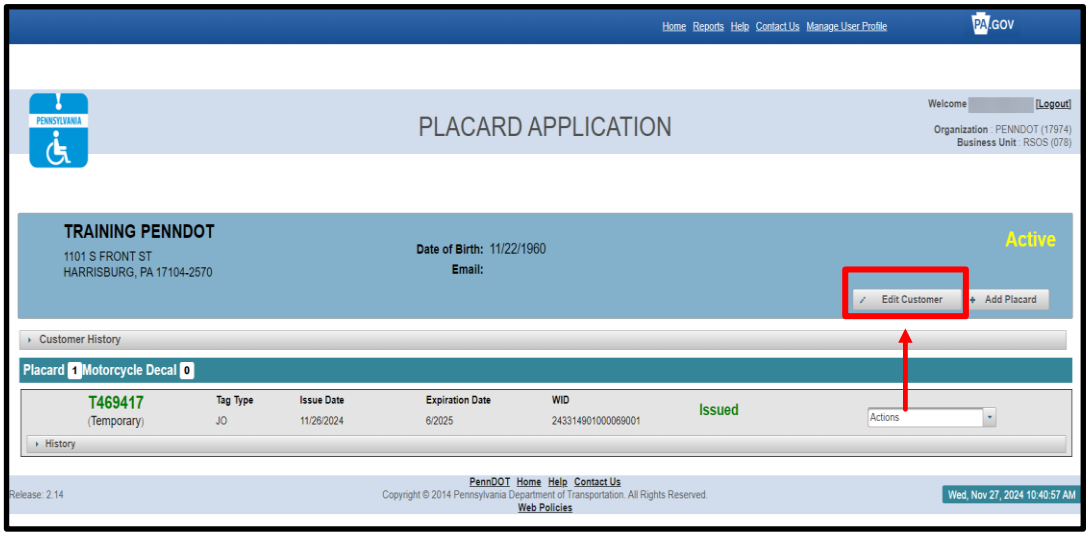
To edit a customer record, the User will follow the procedures to search and find a customer.

NOTE: Any updates on the Customer Profile will only be saved on the Customer History. Name and Address Changes will require a "Replace ID" transaction.

The business requirement is if the PA DL/Photo ID# is on the application it **MUST** be entered on the customer record. The User when processing applications are required to ensure the PA DL/Photo ID# is on the record.

Required Forms:
MV-145A or MV-63

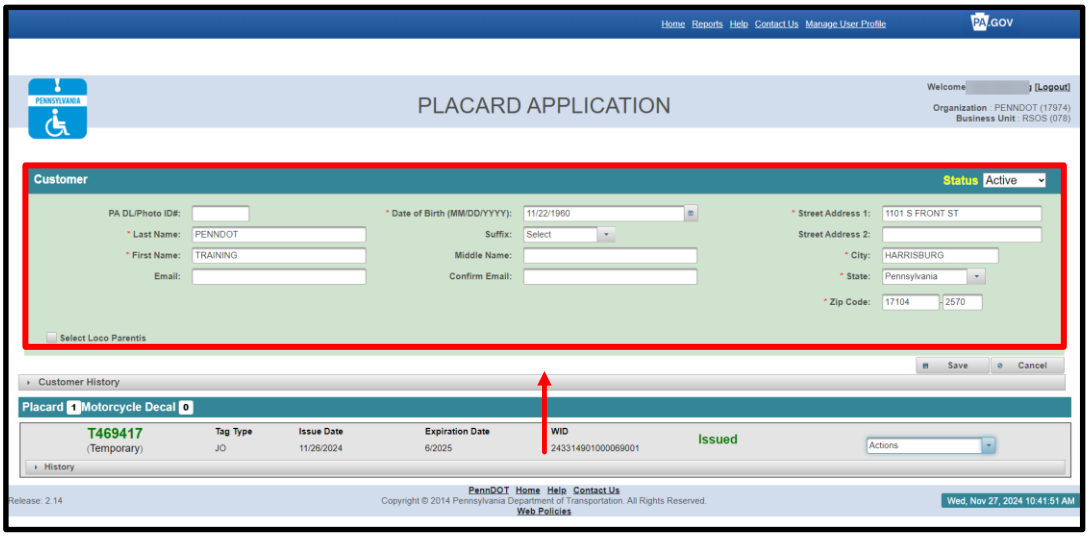
EDIT CUSTOMER / ID CARD REPLACEMENT



The User will be in the customer record.

Step 1. Click Edit Customer

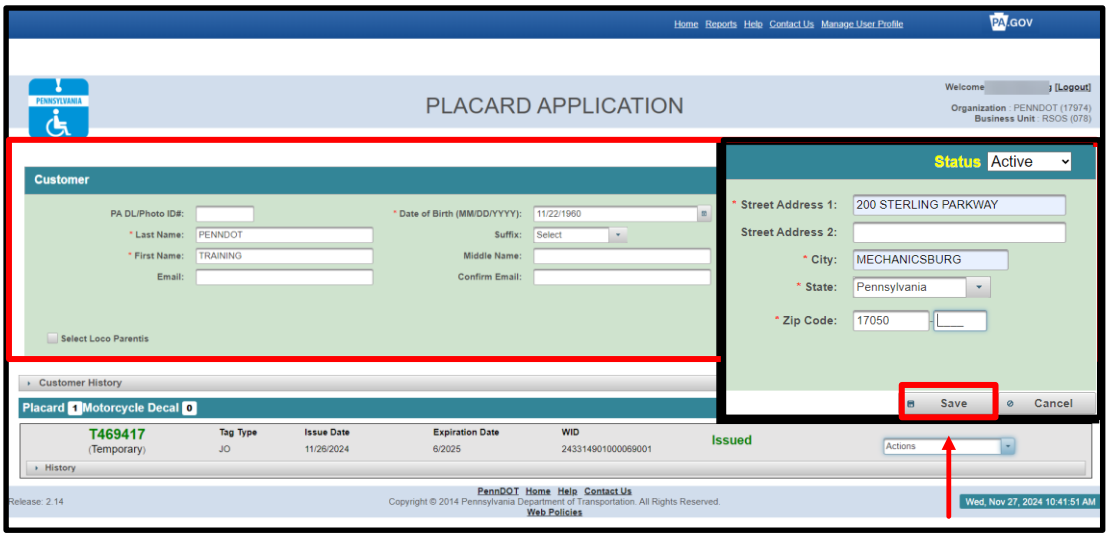
EDIT CUSTOMER / ID CARD REPLACEMENT



The User will be directed to the Customer Profile Panel.

The User will have access to all fields and change the information accordingly.

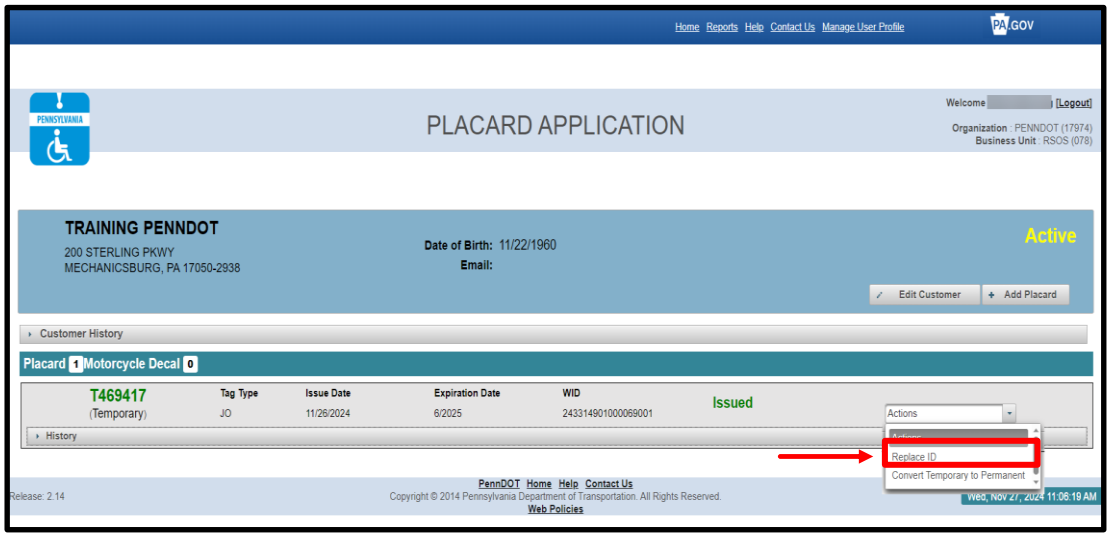
EDIT CUSTOMER / ID CARD REPLACEMENT



After the Customer Profile Panel has been updated.

- Click Save.

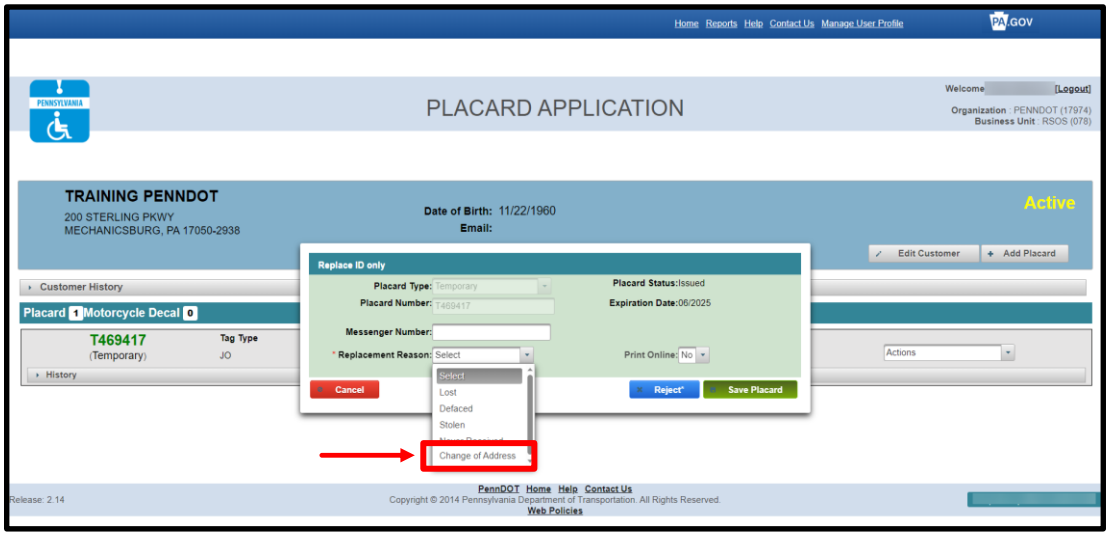
EDIT CUSTOMER / ID CARD REPLACEMENT



To Print a Replacement ID Card

- Click on Actions Dropdown on the current placard
- Select Replace ID

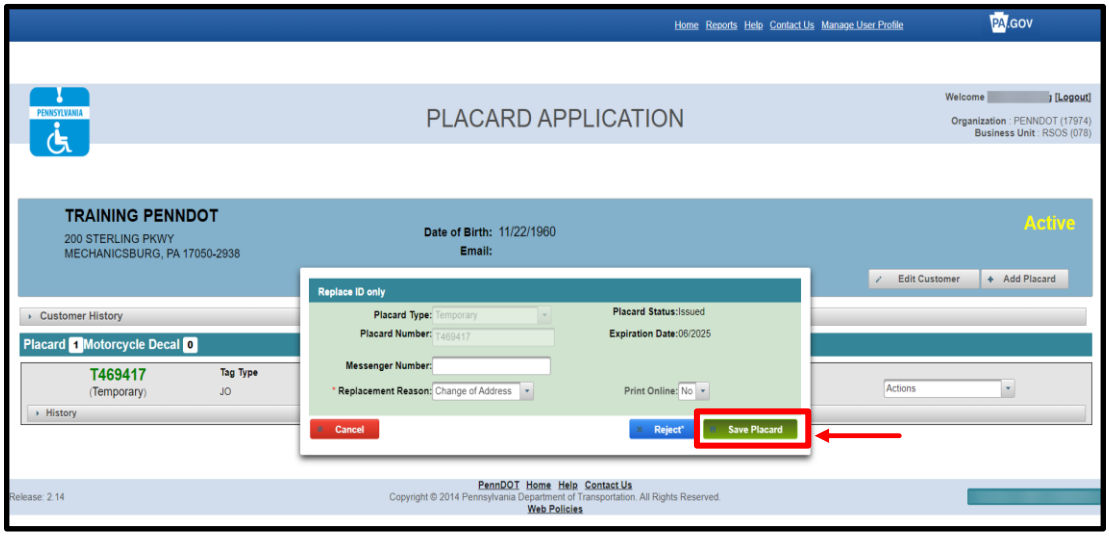
EDIT CUSTOMER / ID CARD REPLACEMENT



Replace ID only box populates.

- Click on Replacement Reason Dropdown
- Select Reason for Replacement

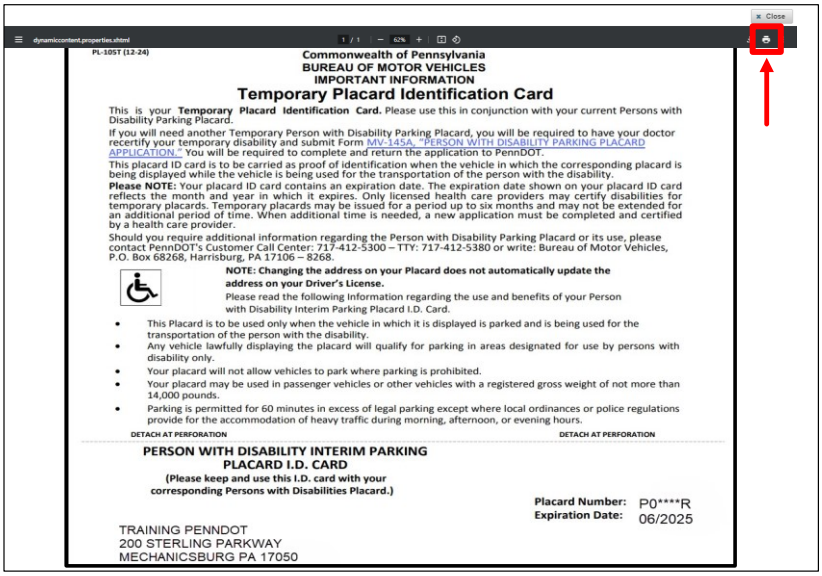
EDIT CUSTOMER / ID CARD REPLACEMENT



Replace ID only box populates.

- NOTE: Print Online Option is always “No”
- Click on Save Placard

EDIT CUSTOMER / ID CARD REPLACEMENT



PDF ID Card will open. To Print Click on Printer Icon.

- NOTE: Do not Click on "Close" until ID card has printed.