

Operator Self Service Site Help.

Contents

Use of the website:

Please refer to the Terms and Conditions link for guidance on using the site.

Accessibility:

We have made every effort to make the site accessible to most users. Please refer to the accessibility link for more information.

Frequently Asked Questions (FAQ's):

We have provided a list of common questions and answers on this link to general enquiries. Please select this link for further information.

Operator Search:

This option allows you to search our database of operator licences and provides basic information about them. You can search via different methods such as the licence number or operator name and the HGV operator licence database or the PSV operator licence database.

Bus Registration Search:

You can search for recorded bus registrations here using various search terms. The results will display information about the service such as the registration number and the service number and destination. Only accepted registrations will be visible here.

Publication Search:

If you wish to check if an application for a licence or a variation application has appeared in the Notices and Proceedings or Applications and Decisions publication, you can do so here. You can search via various methods such as the postcode or operator name, which will produce a list of results.

Partner Self Service:

This option provides access to our records for enforcement partners such as the police. Should you wish to gain access to this system please contact us.

Local Authority Inbox:

This access is for local authorities to view Electronic Bus Service Registrations (EBSR) files. If you represent a local authority and would like access to this system please contact us.

Logging on to Operator self service.

At the login screen you should enter the user i.d. you created when registering for self service and the password sent to you in the post, and select login.

Now you will need to enter the requested letters or numbers from your memorable word and click proceed. This will bring you to the home page of your self service account. If you have just registered for self service and have not received your password through the post yet, then please wait for this password before attempting to login. If you have an urgent change or enquiry that cannot wait for the password then please contact us.

If you have forgotten some of your login details then please use the links to request a reminder of the user i.d., memorable word or reset of the password.

Navigating around the site:

There is a left side menu to help you access the services available. Hover over the desired option and select the option to go to that service.

Options available:

- Home:

This is the home page you will first see when logging in to self service.

- Licence summary:

This provides brief details about your operator licence (s). You can select the links to access further details. It will also show basic details about any applications that are currently in progress. There is also a link here to report any of your operator licences that you feel are missing from the site.

- List Vehicles:

This shows you a list of the vehicles that are currently specified on your operator licence(s) and the ones that have been removed. You need to select the operator licence you want to view by using the drop down box. To narrow your search for a particular vehicle you can use the search drop down box and select the first letter of the registration mark to go to that

vehicle. You can also print a list of the vehicles here.

- Remove/add vehicles:

At the first step you will be able to remove vehicles from your operator licence. You should always remove any vehicles that you no longer want on the licence before adding new ones. Just put a tick in the box next to the registration mark, tell us what has happened to the disc by selecting the appropriate option underneath the registration mark list and then selecting "Confirm Removal".

If you have no vehicles to remove but wish to add one, then please select "Go to add vehicles."

You will now be in the second step where you can add vehicles to the operator licence. If it is for a goods vehicle operator licence you need to enter the registration mark (with no gaps), the gross plated weight all in numbers e.g. 7500 for a 7.5.tonne vehicle, the most appropriate body type from the drop down box and any of the tick boxes that are appropriate. When you have done this please select the "Add vehicle" button to add the vehicle. If you have any other vehicles to add you can enter the next vehicle and repeat until you have finished.

When you have finished select "Finish and close."

For PSV operator licences you need to enter the registration mark with no gaps, the certificate of initial fitness number and select the vehicle type from the drop down box. When you have done this please select the "Add vehicle" button to add the vehicle. If you have any other vehicles to add you can enter the next vehicle and repeat until you have finished.

When you have finished select "Finish and close."

- Transfer Vehicles:

This can only be used if you have more than one operator licence linked to your login. This facility allows you to transfer a vehicle from one licence to another quickly using the ">>" and "<<" buttons.

- Change Correspondence Address/Trading Name:

If the address where we would send any mail to you or your contact number has changed then you should update your records. You can do this via the Change Correspondence Address/Trading Name option.

To change a correspondence address, enter the postcode of the new address first in the postcode field and press Postcode Search. The rest of the address will then be populated automatically. If for any reason the

postcode does not bring up the correct address, you can press the edit address button and overtype the correct address details. When you have finished press the Save changes button and the record will be updated.

Please note, if you do not have a valid e-mail address entered in the E-mail field, then you will be required to enter one before proceeding.

To change a telephone or fax number, select the old number from the list provided and select delete. You can then add phone or fax numbers by entering the new number in the box next to the add button. When you have entered the details just select the add button to add the new number. If you have finished select the Save changes button.

To add a Trading name, type in the details in the field next to the add button and then press add. To remove a Trading Name, select from the list and press remove. You can also amend the type of business you operate in by choosing a selection from the drop-down menu in the Trade/Business field.

When all changes have been made, press the Save changes button to update the changes and to send it to the operator licensing office. If at any time you wish to exit the process without making any changes, select Discard.

- Add/Remove Director:

If you are a registered company then you will have a list of the directors on your operator licence. If any of the directors change then you need to notify us. You can do this on-line by clicking the Add/Remove Director option.

To add a director, select the Add button from the main screen. You will then be directed to a new screen where you are required to enter the full first name, surname and date of birth for each new director. When each director has been added, select Add Director's Details. The screen will refresh to blank fields to allow you to enter the details of the next director. When you have added all relevant directors, select close and continue to return to the main screen. On this screen, you will see the details of the directors you have added with the status Application to be submitted next to them.

You must then answer all questions above, by clicking Yes or No via the radio buttons. If you answer Yes to any of the questions, a text box appear where you must enter details of any convictions, bankruptcy, etc relating to a proposed new director. If you have answered yes in error, select no and the text box will be removed. When you have answered all the questions please press the Submit Application button to submit your changes.

To remove a director, put a tick on the box next to the person on the list and click Remove.

If at any time you wish to exit the process without making any changes, select Discard.

- Add/Remove Transport Managers:

You must add any new Transport Managers first before removing any. You must have at least one Transport Manager specified on the operator licence.

To add a Transport Manager, select “Add new” from the main screen. You will then be directed to a new screen where you need to complete all the indicated mandatory fields. You need to have a relevant qualification or exemption to be a nominated Transport Manager. There is a list of the qualifications which is accessible next to the Type of qualification field. Just select the appropriate qualification which will then populate this field.

When you have completed all the information for the Transport Manager, select Add Transport Manager. The screen will refresh to blank fields and it will confirm the Transport Manager has been added. When you have added all relevant Transport Managers, select close to return to the main screen. On this screen, you will see the details of the Transport Managers you have added with the status of Application to be submitted.

You must then answer all the questions above, by clicking Yes or No via the radio buttons. If you answer Yes to any of the questions, a text box appears where you must enter details of any convictions, previous disciplinary action/revocations or action taken regarding repute of fitness relating to each proposed new Transport Manager. If you have answered Yes in error, select No and the text box will be removed. When you have answered all the questions and have finished you need to press the Submit Application button to submit your request. Confirmation will appear on the screen to confirm and inform you that you now need to send your certificate for the Transport Manager qualification to us.

To remove a Transport Manager, choose the relevant person(s) from the list provided and put a tick in the box at the side of that person. Now press “Confirm Removal.” The pop up will ask “Are you sure?” If you select o.k. the screen will refresh and details of the person will be deleted from the screen.

If at any time you wish to exit the process, select Close.

- Operating centre/authorisation changes:

With this option you can add or remove operating centres, increase or

decrease authority or a combination of these. You will be taken through all the steps but you need only answer the part that is relevant to you and proceed to the next step if it is not.

Removing an operating centre.

After you select Operating centre/authorisation changes you will be brought to step 1 Current Applications. Select the Begin/continue application button to go to step 2. At Step 2 you can remove an existing operating centre if you wish. You need to put a tick in the box next to the operating centre(s) you wish to remove and select Remove Operating Centre and select o.k. from the pop-up. Now select the Proceed to next step button which will bring you to step 3 which is to add operating centres. The advice on adding operating centres is below.

If you have completed adding an operating centre (or do not wish to do this), now select the proceed to next step button which will bring you to step 4.

If you need to reduce your overall authority as a result of removing the operating centre just update the vehicles and/or trailers authorised on licence by overtyping in the box the number of vehicles/trailers you want to be authorised for. Then select the update authorisation button to update it and click o.k. When you have finished click the proceed to next step button which will take you to step 5. If you are content with the application you will now need to press the submit application button.

If you are removing an operating centre and not adding any you will be brought straight to step 7 which will confirm the application has been submitted.

If you are adding an operating centre or increasing your authority as well as removing an operating centre you will be brought to step 6 first, where you will need to answer the questions and then select proceed with application to submit the application.

Adding an operating centre.

After you select Operating centre/authorisation changes you will be brought to step 1 Current Applications. Select the Begin/continue application button to go to step 2. If you want to remove an operating centre see the guidance above. If you do not want to remove an operating centre then select the proceed to next step button which will bring you to step 3 which is to add operating centres.

To add an operating centre select the add operating centre button which will bring to a screen where you can input the details of the operating centre.

Enter the postcode first and select postcode search which will populate the address. If you need to amend the address select the edit address button.

For a goods vehicle licence application now enter the details of the advertisement you have placed. If you have not placed and advert yet, then leave the details blank. Please note that PSV operator licence holders do not need to place advertisements.

Fill in the remaining fields and select the save button. You will get a confirmation message to say the site has been added. Now select the close button which will bring you back to the step 3 screen again. If you need to add another site then just select the add operating centre button again and repeat.

If you have finished select the proceed to next step button which will bring you to step 4.

If you need to increase your overall authority as a result of adding the operating centre just update the vehicles and/or trailers authorised on licence by overtyping in the box the number of vehicles/trailers you want to be authorised for. Then select the update authorisation button to update it and click o.k. When you have finished click the proceed to next step button which will take you to step 5. If you are content with the application you will now need to press the submit application button.

You will now be brought to step 6 where you will need to answer the questions and then select proceed with application to submit the application. This will now bring you to step 7 which will confirm the application has been submitted and the actions you now need to take.

Increasing or reducing your authority at an operating centre only.

After you select Operating centre/authorisation changes you will be brought to step 1 Current Applications. Select the Begin/continue application button to go to step 2. Select the proceed to next step button to go to step 3. At step 3 select the proceed to next step button to go to step 4.

You will now be able to alter the authority at an existing site by pressing the link to the operating centre address. The full address will now be shown where you can overtype the authority at the site to the new desired authority. Remember to adjust the parking spaces as appropriate. As this is an existing operating centre the advertisement details are already completed. If you need to advertise because you are a goods vehicle operator and you are applying for an increase at the site, just send the newspaper advertisement to us and we will update this information when you receive it. You will need to select the save button to save the details

and then close. This will bring you to the main screen showing the updated details.

If you need to increase your overall authority as a result of adding the operating centre just update the vehicles and/or trailers authorised on licence by overtyping in the box the number of vehicles/trailers you want to be authorised for. Then select the update authorisation button to update it and click o.k. When you have finished click the proceed to next step button which will take you to step 5. If you are content with the application you will now need to press the submit application button.

If you are reducing your authority only you will be brought to step 7. If you are increasing your authority you will now be brought to step 6 where you will need to answer the questions and then select proceed with application to submit the application. This will now bring you to step 7 which will confirm the application has been submitted and the actions you now need to take.

- Advert Template OC's:

Select Advert Template OC's to get information about advertisements for goods operator licences.

You will see a link to the advertisement template entitled "view the advert template." When you press this link the document will ask you if you want to open or save it. When you open the document it will open in your document program such a word, wordpad or any open source document reading program capable of reading the document.

The advert template is applicable to **GOODS LICENCES ONLY**. There is no requirement for holders of PSV operator licences to advertise any applications in a local newspaper.

Please note, the advert template has been designed as a reference tool for operators to use when an application is made that will require a newspaper advertisement. In all instances, it is the responsibility of the applicant to ensure that all details contained in such an advert are correct and that it has been placed in a suitable publication, within set timescales.

The instances when a newspaper advert will be required are;

- The addition of a new Operating Centre
- The increase of authorisation, for vehicles or trailers, at an existing Operating Centre.

There is no requirement to advertise the removal of an Operating centre or decrease in authorisation. If you have any queries, please contact us.

- Bus Registration Search:

The Bus Registration search is applicable to PSV vehicle operators only. Selecting this option allows you to search for any bus registrations you have submitted or have registered with us. You can search by a specific search term such as the service number or select “show all” to view the entire list.

- EBSR Inbox (PSV only):

If you submit applications for bus services electronically, then the Electronic Bus Service Registration (EBSR) inbox will show you a list of the applications that have been successfully submitted to us. You can download the PDF version of the timetable and official record and also the map. You will have access to the original zip file you submitted also.

- EBSR New Application (PSV only):

You can upload your Electronic Bus Service Registration (EBSR) applications for a new registration, variation or cancellation here by selecting this option. You just need to click the browse button and navigate to where you have stored your file and then select submit to submit it to us. A confirmation will appear on screen to confirm and the PDF of the registered particulars will appear in your EBSR Inbox once this has been successful.

- EBSR Data Refresh (PSV only):

You can upload your Electronic Bus Service Registration (EBSR) applications that are to replace existing manual files without a variation to them here by selecting this option. You just need to click the browse button and navigate to where you have stored your file and then select submit to submit it to us. A confirmation will appear on screen to confirm and the PDF of the registered particulars will appear in your EBSR Inbox once this has been successful.

- View Inbox:

If you have elected to receive correspondence electronically, then documents you are notified about by e-mail will appear here. This is typically and renewal reminders, fee payment requests, licence document or letter from us. Selecting this option will bring you to your inbox which will have links to the documents. By selecting the document you will be asked if you want to save or open it, opening it will display the document. You can archive the document so it is not displayed in your current view. You can do this by putting a tick in the box next to the document and selecting the archive button.

To view current and archive documents you can select the show all button.

- Payment of licence fees On-Line:

Selecting this option from the left hand menu will take you to step 1 where you need to select the licence number you wish to pay a fee for. Selecting the licence will bring you to step 2 where you need to select the fee you wish to pay. Put a tick in the box next to the fee(s) you wish to pay and select the continue button. You will now be at step 3 which are important notes about paying fees on-line. Please read them carefully. If you have any doubts over whether you should continue to make the payment, you should exit the process and contact us before continuing. If you understand the information and wish to continue then please press the continue button at the top of the page.

You will now be brought to step 4 where you need to enter the details of your card. Please select the card type first and then enter the remaining details. If you have entered all the required information and are happy to pay the fee then select the pay now button. The payment will process and may take a few seconds. When it has finished you will be brought to step 5 which will confirm and provide a receipt if the payment details entered were correct.

- Manage User Logins:

If you are the administrator for self service which is usually the person who registered the operator licence for self service, then you will see this option. If you are not then you will not see this option and will not be able to add new users for self service for your company or delete existing ones.

Selecting this option will bring you to a screen which will display all the current users for your company. You will not be able to delete the administrator, so if you wish to swap administrator access to another user at your company then please add this user on first and contact us to swap the administrator access.

If you select the link for the user i.d. it will display information about that user and allow you to request a new password or update the details if you wish to.

Selecting the new user button will bring you to a screen where you can add on an additional user for your company to give them their own login.

- Secure FTP Access.(PSV licence holders with bus registrations only)

This option allows you to request a Secure File Transfer Protocol (SFTP) login to submit Electronic Bus Service Registrations (EBSR) via SFTP

instead of via self service. If you wish to submit bus registrations electronically please contact us.

- Change my Password or login details:

Selecting this option will bring you to a page where you can update your login details or change your password, to perhaps something more memorable. If you have not already set up your hint questions then please do so, as when they are set up this will allow you to request your login details on-line if you ever forget them. You can also change your registered e-mail address for self service here by overtyping it with the new e-mail address and selecting the save details button.