



# Portal Forms Overview

**Training Presentation**  
*for Road Managers*

Version 1  
September 2017



# Purpose of this Training

## Training Purpose

To provide you with an **understanding** of the NHVR Portal – Road Manager ‘Portal Forms’ Module.

Also provide opportunity to **experience** the Portal Forms before using the product.

## Course Outline

- Portal Forms Overview
- How does it work?
- Examples and Practice
- Your Readiness
- Assessment (as required)
- Evaluation

# Background

- The National Heavy Vehicle Regulator has been improving the way **heavy vehicle permits** are accessed, managed and issued across Australia.
- The **NHVR Portal** takes the existing complex, largely paper-based environment to a complete, integrated digital services platform, incorporating features such as a conditions library and route planner.

The screenshot displays the NHVR Portal interface for a specific case. At the top left, the NHVR logo and 'NHVR Portal' are visible. The main heading is 'Case: 90519r2v2 - Amend - B-Double'. Below this, a summary bar includes 'Customer: [icon] Road Mgr: [icon] Assigned to: Shannon Finn Case Status: [Yellow Tag] Due: 19-Oct-2017 (28d)'. A navigation menu shows 'CASE DETAILS' (active), 'CASE MANAGEMENT', and 'ROUTE MANAGEMENT'. The 'Vehicle / load' section features an illustration of a blue truck with a B-Double trailer. Below the illustration, 'Vehicle configuration' is listed as 'B-Double', with 'Height: Up to 4.3m' and 'Length: Up to 25m/26m'. A question 'What freight will you be carrying?' is followed by the answer 'General Freight'. On the right, an 'Overview' sidebar shows a 'Case progress' bar with a green checkmark, 'Case duration' of '1d', 'Regulator Case Officer: athena ferraro', 'Application: Amend Permit', and 'Type: B-Double'. The NHVR logo is also present in the bottom right corner of the slide.

# About the NHVR Portal

The NHVR Portal is one digital platform with multiple views or components. The purpose of the **Road Manager Module** is to *replace* the NHVR's existing use of emails to request and seek consents from road managers.



## NHVR Portal

### CUSTOMERS

Prepare, lodge and track permit applications online

- Smart form process
- Fleet management
- Permit progress tracking
- Mapped route planning
- Application history
- Account management
- Online payments

### ROAD MANAGERS

Respond to consent requests and review decisions

- Consent management
- Route management
- Decision history
- Information request tools
- Standard condition sets
- Improved data quality
- Activity reporting

### REGULATOR

Manage all permit actions in one platform

- Automated data entry
- Task management
- Network data management
- Workload support tools
- Communication messaging
- Conditions oversight
- Activity auditing



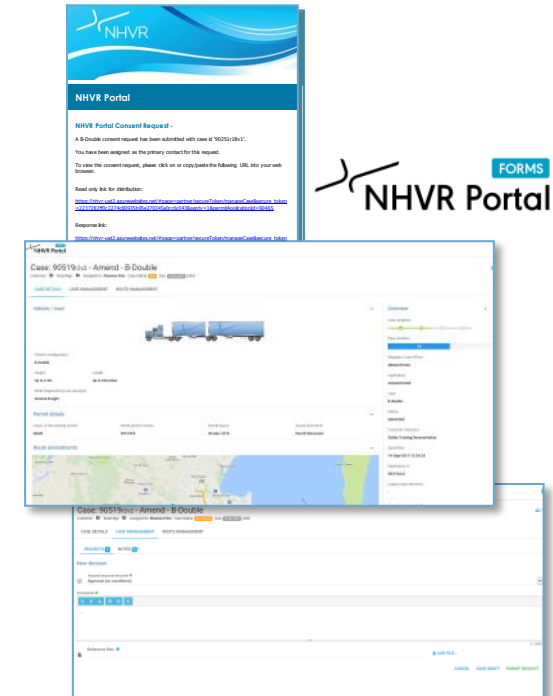
# Portal Forms Overview

Part 1



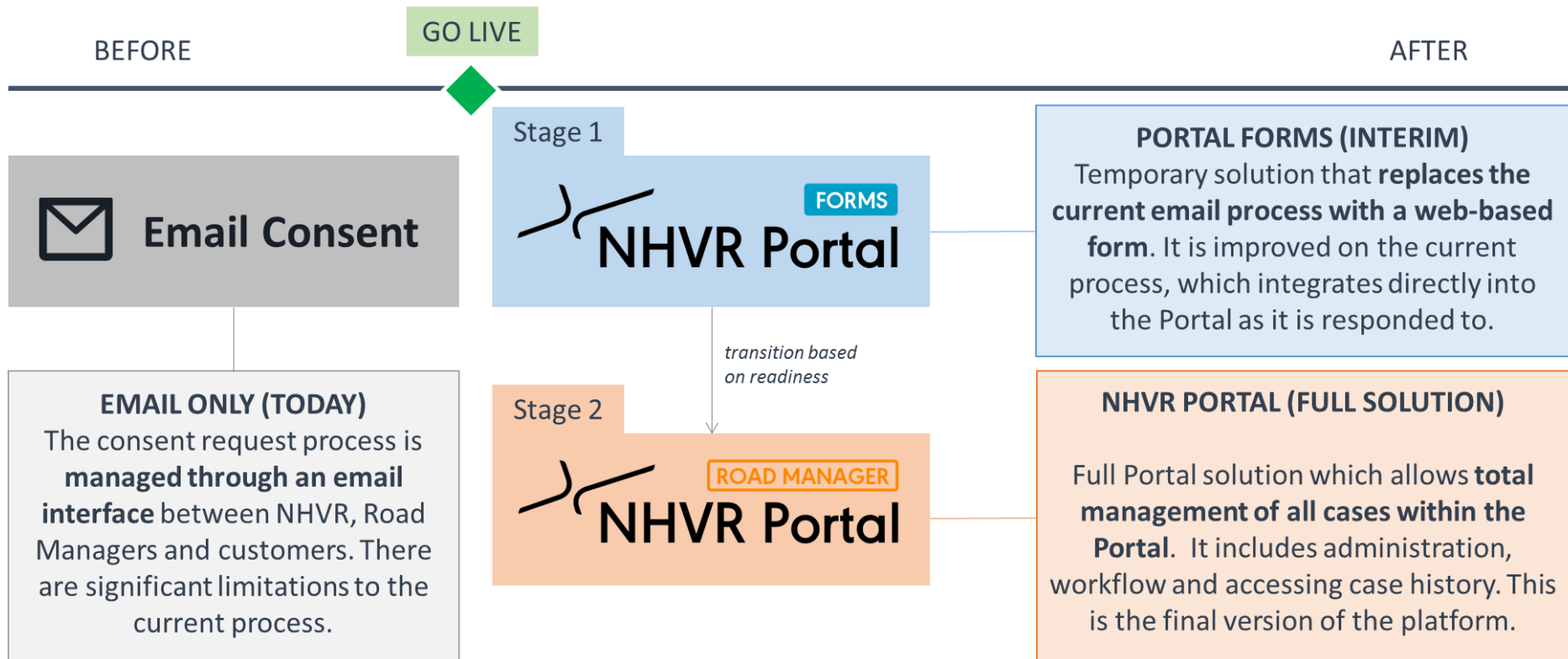
# Part 1 | Portal Forms Overview

- Portal Forms is a key part of the NHVR's **transition approach** ... blending the current email process with completing online consents.
- Initially you will be asked to use an online form, a **Portal Form**. This is very similar to the email process you currently follow.
- Then, the **full version** of the NHVR Portal - Road Manager Module will be made available to Road Managers nationally in a staged release.



# Part 1 | Portal Forms Overview

Road Managers will **transition** to the full NHVR Portal upon readiness





# How does it work?

Part 2

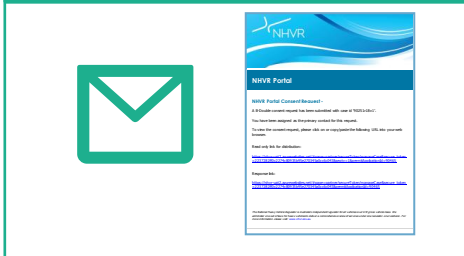




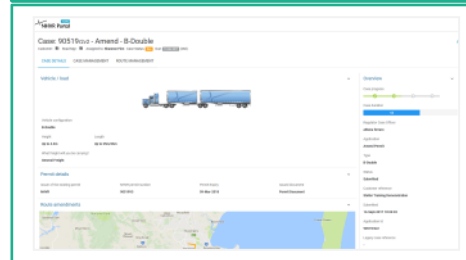
# Part 2 | How does it work?

## Simple Overview

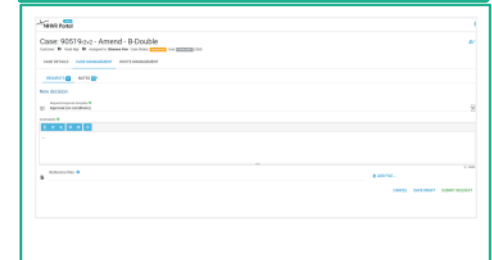
### STEP 1 EMAIL from NHVR



### STEP 2 ASSESS in Case Tracker



### STEP 3 SUBMIT

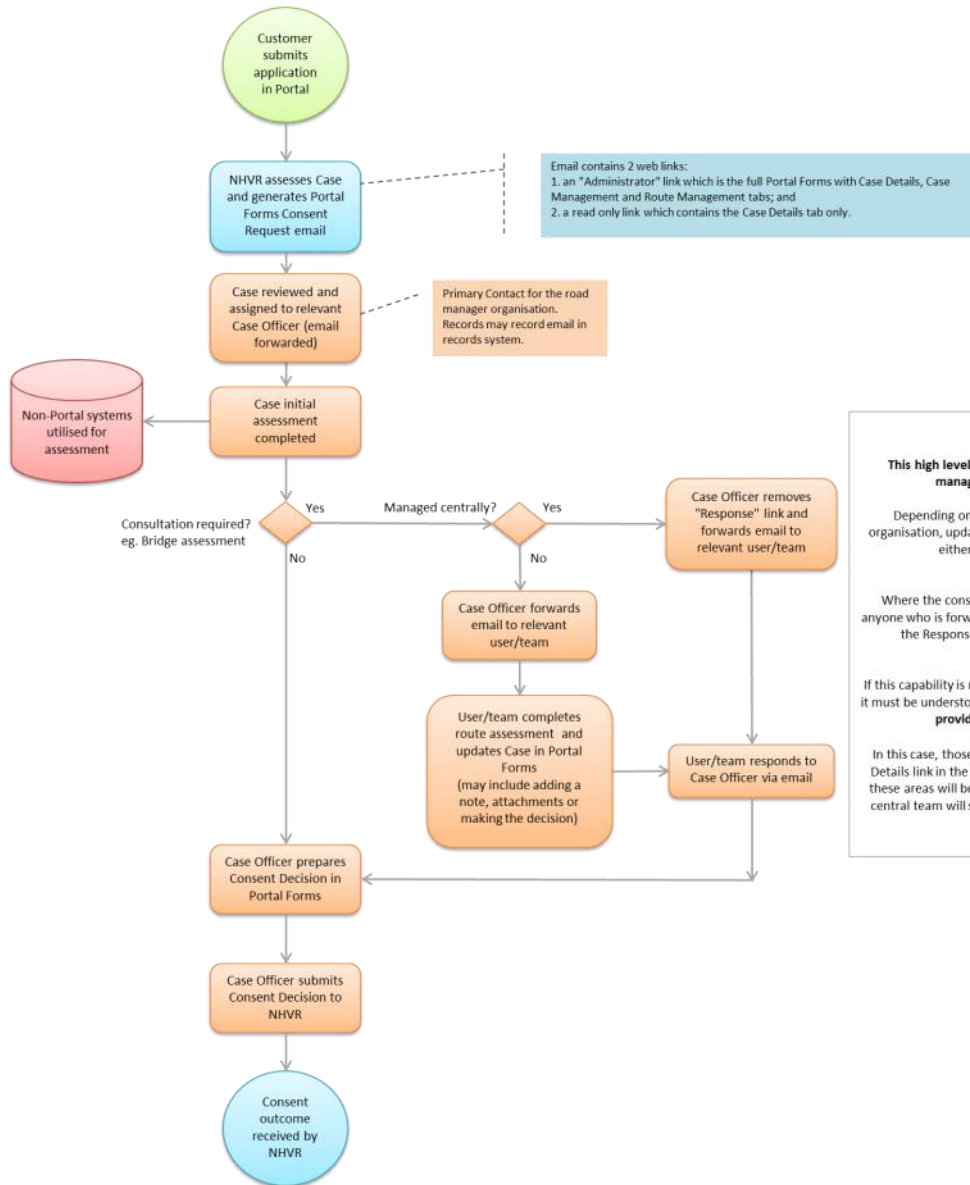


## About the new process

- Email sent to Road Manager (primary contact) with link to case information
- Link opens full case information
- Email can be forwarded to other internal Road Manager staff for their action
- Additional actions are available: Extension of Time, Internal Review, Alternate Routes
- All activity occurs in the Portal and NHVR process and issue the permit using Portal
- Fits with known Road manager existing processes

# Part 2 | How does it work?

## Detailed Workflow



**OVERVIEW**

This high level workflow describes the proposed process for road managers using the NHVR Portal Forms solution.

Depending on the size of the team and roles of individuals in the organisation, updating and providing a decision on a consent request can either be managed **1. centrally** or **2. distributed**.

**1. Centrally Managed**  
 Where the consent process is centrally managed in the organisation, anyone who is forwarded the email can only view the case details, provided the Response link in the email is removed prior to forwarding.

**2. Distributed**  
 If this capability is managed under a **distributed** model in the organisation, it must be understood that **anyone** that receives the Portal Forms email **can provide a decision response** for the organisation.

In this case, those distributed individuals will click on the read only Case Details link in the email to view the case information. The response from these areas will be as per the current process in the organisation and the central team will subsequently update the case and provide the decision response to the NHVR.



# Examples and Practice

Part 3



# Part 3 | Example and Practice

## STEP 1 EMAIL

## STEP 2 ASSESS

CASE DETAILS

CASE MANAGEMENT

Start Assessment

Extension of time

Information request

Decision

ROUTE MANAGEMENT

Alternate route

## STEP 3 SUBMIT

For additional support visit the Help Centre:

<https://help.nhvr.gov.au/support>



### NHVR Portal Consent Request -

A Performance Based Standards (PBS) consent request has been submitted with case id '69293r1v1'. You have been assigned as the primary contact for this request. To view the consent request, please click on or copy/paste the following URL into your web browser.

Read only link for distribution:

[https://cp-uat.service.nhvr.gov.au/#page=partner/secureToken/manageCase&secure\\_token=482cf47a2ab6f175ae35151f7046577a2a2e2536&septy=1&permitApplicationId=69293](https://cp-uat.service.nhvr.gov.au/#page=partner/secureToken/manageCase&secure_token=482cf47a2ab6f175ae35151f7046577a2a2e2536&septy=1&permitApplicationId=69293)

2

Response link:

[https://cp-uat.service.nhvr.gov.au/#page=partner/secureToken/manageCase&secure\\_token=482cf47a2ab6f175ae35151f7046577a2a2e2536&permitApplicationId=69293](https://cp-uat.service.nhvr.gov.au/#page=partner/secureToken/manageCase&secure_token=482cf47a2ab6f175ae35151f7046577a2a2e2536&permitApplicationId=69293)

1

*The National Heavy Vehicle Regulator is Australia's independent regulator for all vehicles over 4.5t gross vehicle mass. We administer one set of laws for heavy vehicles to deliver a comprehensive range of services under one regulator, one rulebook. For more information, please visit: [www.nhvr.gov.au](http://www.nhvr.gov.au).*

## STEP 1 EMAIL

1. When a permit application is submitted, you will receive an email from **NHVR\_Portal@nhvr.gov.au**
2. Open your email and select the **Response Link 1**. The **Read only 2** link can be used if other teams within your organisation need to review the application but not make decisions on the case.
3. Portal Forms will open directly from the links, without needing you to login to the Portal.

# Part 3 | Example and Practice

## STEP 1 EMAIL

## STEP 2 ASSESS

CASE DETAILS

CASE MANAGEMENT

Start Assessment

Extension of time

Information request

Decision

ROUTE MANAGEMENT

Alternate route

## STEP 3 SUBMIT

For additional support visit the Help Centre:  
<https://help.nhvr.gov.au/support>



### Case: 69293r1v1 - New - Performance Based Standards (PBS)

Customer: Road Mgr: Assigned to: Portal Training Case Status: New Due: 25-Oct-2017 (28d)

CASE DETAILS CASE MANAGEMENT ROUTE MANAGEMENT

1

Vehicle / load

Your PBS Vehicle Approval will specify your vehicle configuration

Vehicle configuration

PBS vehicle

PBS Approval Type

PBS In-Principle

Permit details

Issuer of the existing permit	NHVR permit number
NHVR	69293V1

Permit period

Period From	Period To
11-Dec-2016	10-Dec-2019

Route / area details

Select the bridge assessment tier:

Other

By this application for a proposed PBS Assessment Methodology for road transport to proposed PBS vehicles

Overview

Case progress



Case duration



Regulator Case Officer

James Macklin

Application

New Permit

Type

Performance Based Standards (PBS)

Status

Submitted

Customer reference

HayAustralia

Submitted

12-Dec-2016 14:52:11

Application Id

69293

Legacy case reference

56828

## STEP 2 ASSESS

CASE DETAILS

1. On the **Case Details tab** , you can view the Road Manager, Case Number and Case Status .

NHVR = blue  
Green=Customer  
Orange=Road Manager

2. In the Overview section , view a summary of the Case information and Case progress.

# Part 3 | Example and Practice

## STEP 1 EMAIL

## STEP 2 ASSESS

CASE DETAILS

CASE MANAGEMENT

Start Assessment

Extension of time

Information request

Decision

ROUTE MANAGEMENT

Alternate route

## STEP 3 SUBMIT

For additional support visit the Help Centre:  
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NHVR Portal

Case: 69293r1v1 - New - Performance Based Standards (PBS)

Customer: Road Mgr Assigned to: Portal Training Case Status: New Due: 25-Oct-2017 (28d)

CASE DETAILS CASE MANAGEMENT ROUTE MANAGEMENT

WORKFLOW NOTES 1

START ASSESSMENT

Click on the 'Start Assessment' button to manage the case

PRINT EXIT

## STEP 2 ASSESS

### CASE MANAGEMENT

1. On the **Case Management tab > Workflow**, select Start Assessment **1**.
2. Here you can also view and add Notes on the Case **2** by clicking the expand/ collapse arrows **3**.

NHVR Portal

Case: 69293r1v1 - New - Performance Based Standards (PBS)

Customer: Road Mgr Assigned to: Portal Training Case Status: Assessment Due: 25-Oct-2017 (28d)

CASE DETAILS CASE MANAGEMENT ROUTE MANAGEMENT

REQUESTS NOTES 1

ADD NOTE

Type	Subject	Date created	Labels
⌵	Consent workflow stage: 'Assessment'	29-Sept-2017	⊞ <
⌵	Consent workflow stage: 'Assessment'	28-Sept-2017	⊞ <
⌵	Consent workflow stage: 'Assessment'	28-Sept-2017	⊞ <
⊞	Alternative route created	28-Sept-2017	⊞ <
⊞	Alternative route created	28-Sept-2017	⊞ <
⊞	Alternative route created	28-Sept-2017	⊞ <
⌵	Consent workflow stage: 'New'	27-Sept-2017	⊞ <

# Part 3 | Example and Practice

## STEP 1 EMAIL

## STEP 2 ASSESS

CASE DETAILS

CASE MANAGEMENT

*Start Assessment*

*Extension of time*

*Information request*

*Decision*

ROUTE MANAGEMENT

*Alternate route*

## STEP 3 SUBMIT

For additional support visit the Help Centre:  
<https://help.nhvr.gov.au/support>

NHVR Portal

Case: 69293r1v1 - New - Performance Based Standards (PBS)

Customer: [icon] Road Mgr: [icon] Assigned to: Portal Training Case Status: Assessment Due: 25-Oct-2017 (28d)

CASE DETAILS CASE MANAGEMENT ROUTE MANAGEMENT

REQUESTS 0 NOTES 0

REQUEST AN EXTENSION OF TIME (EOT) INFORMATION REQUEST (IR) DECISION

Type Subject Status Labels

No request tasks

PRINT EXIT

## STEP 2 ASSESS

*Start Assessment*

1. Once assessment is started, you can choose the action 1 you want to take on the case:

- *Request an Extension of time*
- *Information Request*
- *Decision*

# Part 3 | Example and Practice

## STEP 1 EMAIL

## STEP 2 ASSESS

CASE DETAILS

CASE MANAGEMENT

Start Assessment

Extension of time

Information request

Decision

ROUTE MANAGEMENT

Alternate route

## STEP 3 SUBMIT

For additional support visit the Help Centre:  
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The screenshot shows the NHVR Portal interface for a case titled "Case: 69293r1v1 - New - Performance Based Standards (PBS)". The case status is "Assessment" and the due date is "25-Oct-2017 (28d)". The interface is divided into three main sections: CASE DETAILS, CASE MANAGEMENT (active), and ROUTE MANAGEMENT. Under CASE MANAGEMENT, there are tabs for REQUESTS (0) and NOTES (0). The "New extension of time request" form is displayed, showing the extension request date as "25-Oct-2017" and the consent due date as "25-Oct-2017". A dropdown menu for "Request/response template" is open, showing the selected option: "Consultation is required under law with another entity". Below this is a "Reasons" text area containing the text: "To progress this consent decision consultation is required under law with another entity". At the bottom of the form, there is a "Reference files" section with an "ADD FILE..." button. The form has three numbered callouts: 1 points to the template dropdown, 2 points to the reasons text area, and 3 points to the "ADD FILE..." button. At the bottom right of the form, there are three buttons: "CANCEL", "SAVE DRAFT", and "SUBMIT REQUEST", with the "SUBMIT REQUEST" button having a 4 callout.

## STEP 2 ASSESS

### Extension of time

1. If **Extension of time** is selected.
2. Choose the template you wish to use for this request from the drop down list **1**.
3. Add notes in the reasons text box **2**.
4. Attach any files **3**.
5. Submit request **4**.



# Part 3 | Example and Practice

## STEP 1 EMAIL

## STEP 2 ASSESS

CASE DETAILS

CASE MANAGEMENT

Start Assessment

Extension of time

Information request

Decision

ROUTE MANAGEMENT

Alternate route

## STEP 3 SUBMIT

For additional support visit the Help Centre:  
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NHVR Portal

Case: 69293r1v1 - New - Performance Based Standards (PBS)

Customer: [icon] Road Mgr: [icon] Assigned to: Portal Training Case Status: Assessment Due: 25-Oct-2017 (28d)

CASE DETAILS CASE MANAGEMENT ROUTE MANAGEMENT

REQUESTS 0 NOTES 0

New information request

Request/response template  
Customer supplied route assessment 1

Comments

Please organise a route assessment and attach the route assessment report 2

Reference files 3 ADD FILE...

CANCEL SAVE DRAFT SUBMIT REQUEST 4

## STEP 2 ASSESS

### Information request

1. If **Information Request** is selected.
2. Choose the template you wish to use for this request from the drop down list 1.
3. Add notes in the reasons text box 2.
4. Attach any files 3.
5. Submit request 4.

# Part 3 | Example and Practice

## STEP 1 EMAIL

## STEP 2 ASSESS

CASE DETAILS

CASE MANAGEMENT

Start Assessment

Extension of time

Information request

Decision

ROUTE MANAGEMENT

Alternate route

## STEP 3 SUBMIT

For additional support visit the Help Centre:  
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NHVR Portal

Case: 69293r1v1 - New - Performance Based Standards (PBS)

Customer: Road Mgr: Assigned to: Portal Training Case Status: Assessment Due: 25-Oct-2017 (28d)

CASE DETAILS CASE MANAGEMENT ROUTE MANAGEMENT

REQUESTS NOTES

New decision

Request/response template  
Approval (no conditions)

Comments

Reference files

ADD FILE...

CANCEL SAVE DRAFT SUBMIT REQUEST

## STEP 2 ASSESS

Decision

1. Once you have reviewed the route under Route Management (next section), return to **Case Management > Decision**.
2. If **Decision** is selected.
3. Choose the template you wish to use for this request from the drop down list 1.
4. Add notes in the reasons text box 2, including any conditions.
5. Attach any files 3.
6. Submit request 4.

# Part 3 | Example and Practice

## STEP 1 EMAIL

## STEP 2 ASSESS

CASE DETAILS

CASE MANAGEMENT

Start Assessment

Extension of time

Information request

Decision

ROUTE MANAGEMENT

Alternate route

## STEP 3 SUBMIT

For additional support visit the Help Centre:  
<https://help.nhvr.gov.au/support>

**NHVR Portal**

Case: 69293r1v1 - New - Performance Based Standards (PBS)  
Customer: Road Mgr Assigned to: Portal Training Case Status: Assessment Due: 25-Oct-2017 (28d)

CASE DETAILS CASE MANAGEMENT **ROUTE MANAGEMENT 1**

PLAN ROADS LAYERS SUMMARY 3

Route history  
Alternate-1 Customer COPY ROUTE

Waypoint

- 1 Calder Hwy, Bridgewater VIC
- 2 Coode Road, West Melbourne
- Add another address

OPTIONS RECALCULATE

## STEP 2 ASSESS

### ROUTE MANAGEMENT

1. The **Route Management tab 1** displays the route submitted by the Customer to the Road Manager.
  2. Review the customer's requested route **2**, including the details under the Plan, Roads, Layers and Summary tabs **3**.
  3. Then either return to **Case Management tab** and Approve the case (with or without conditions).
- OR
4. Propose an alternate route.

*NOTE: Use the Recalculate button to reload the map view if the roads are not displaying.*

# Part 3 | Example and Practice

## STEP 1 EMAIL

## STEP 2 ASSESS

CASE DETAILS

CASE MANAGEMENT

Start Assessment

Extension of time

Information request

Decision

ROUTE MANAGEMENT

Alternate route

## STEP 3 SUBMIT

For additional support visit the Help Centre:  
<https://help.nhvr.gov.au/support>

NHVR Portal  
Case: 69293r1v1 - New - Performance Based Standards (PBS)  
Customer: Road Mgr: Assigned to Portal Training Case Status: Due (286) (286)

CASE DETAILS CASE MANAGEMENT ROUTE MANAGEMENT

PLAN ROADS LAYERS SUMMARY

Route history  
Alternate-2 Regulator COPY ROUTE 1

Waypoint  
80-82 Charlotte St, Aitkenvale QLD 4814 2  
33 Wentworth Ave, Mundingburr QLD 481 3  
Add another address

OPTIONS RECALCULATE

NHVR Portal  
Case: 69293r1v1 - New - Performance Based Standards (PBS)  
Customer: Road Mgr: Assigned to Portal Training Case Status: Due (286) (286)

CASE DETAILS CASE MANAGEMENT ROUTE MANAGEMENT

PLAN ROADS LAYERS SUMMARY

Route history  
Alternate-5 Road Manager (QLD) 4 4  
Alternate-5 Road Manager (QLD) 4  
Created 28-Sep-2017 08:17:34  
Alternate-4 Road Manager (QLD) 4  
Created 28-Sep-2017 07:29:08  
Alternate-3 Road Manager (QLD) 4  
Created 28-Sep-2017 07:27:16  
Alternate-2 Regulator Submit entry  
Created 27-Sep-2017 15:00:12  
Alternate-1 Continue

OPTIONS RECALCULATE

## STEP 2 ASSESS

### Alternate Route

1. To propose an alternate route, you simply make changes to the displayed route.
2. Add/ change the route by typing in the roads as Waypoints 1 or drag n drop the route using the drop pins 2. Then **select Save Alt.**
3. The new alternate version created will be named with a label – Road Manager 3.
4. View the Route History on this case using the drop down arrow 4.
5. Return to **Case Management>Requests** and select the Alternative Route Proposal template, then **Submit Request.**

# Part 3 | Example and Practice

## STEP 1 EMAIL

## STEP 2 ASSESS

CASE DETAILS

CASE MANAGEMENT

Start Assessment

Extension of time

Information request

Decision

ROUTE MANAGEMENT

Alternate route

## STEP 3 SUBMIT

For additional support visit the Help Centre:  
<https://help.nhvr.gov.au/support>

NHVR Portal

Case: 69293r1v1 - New - Performance Based Standards (PBS)

Customer: Road Mgr: Assigned to: Portal Training Case Status: Request Rec'd - Under Review Due: 25-Oct-2017 (28d)

CASE DETAILS CASE MANAGEMENT ROUTE MANAGEMENT

REQUESTS 1 NOTES 0

REQUEST AN EXTENSION OF TIME (EOT) INFORMATION REQUEST (IR) DECISION

Type	Subject	Status	Labels
	Road Manager IR: Approval (no conditions)	Regulator Reviewing Request	
Portal Training (Road Manager Account)	Road Manager Request		
28 Sept 2017 11:14 AM	Approved...		

WITHDRAW 3

## STEP 3 SUBMIT

1. For *Extension of Time, Information Request or Decision* once you click **Submit request**.
2. The next screen displays the change of status 1.

NHVR = blue  
Green=Customer  
Orange=Road Manager

3. The Case action buttons will appear grey 2 until the current request is completed.
4. At any time you can return to the case via the email link. If required, you can withdraw your **Submitted request** by expanding the Request note and clicking withdraw 3.

*NOTE: The system rule is that only one request can be actioned against a case at any given time.*



# Support and Readiness

Part 4



# Part 4 | Your Readiness

This survey sets out all of the steps that a Road manager will need to cover off in order to be ready to access and use the Portal Forms

### 1 SYSTEM READY

**A** Can you access the **NHVR Portal** site?

Check that your firewall and internet security allow access to the NHVR Portal [www.service.nhvr.gov.au](http://www.service.nhvr.gov.au)

COMPLETED

**B** Can you access the **Help Centre** site?

Check that your firewall and internet security allow access to the Help Centre [help.nhvr.gov.au/support](http://help.nhvr.gov.au/support)

COMPLETED

**C** Can you receive NHVR domain **emails**?

Ensure that email notifications from '@nhvr.gov.au' do not automatically go to your email spam folder

COMPLETED

**D** Do you have **PDF** viewing capability?

To view permits, Adobe Acrobat Reader (or similar) will need to be installed - free download [here](#).

COMPLETED

### 2 PROCESS READY

**A** Have you determined how you will manage the **consent process** in Portal Forms?

It is recommended that your respond to consent request from the NHVR using similar processes you today. This would include:

- One person respond to the NHVR via Portal Form
- Circulate consent link to internal stakeholders
- Manage internal input through emails

COMPLETED

**B** Do you need to **close out** 'older' consents prior to go-live of Portal Forms?

It is recommended Road Managers reduce the number of active consent requests in process to smooth the transition to Portal Forms.

Consider developing a strategy to reduce the number of 'in process' consents, especially those that may be over 28 days old?

COMPLETED

### 3 PEOPLE READY

**A** Do you have **knowledge** of Portal Forms?

Check to see if you and your staff attended an in person Activation session on the NHVR Portal? Have you recently viewed the Portal Form webinar at the [www.yoursaynhvr.com.au](http://www.yoursaynhvr.com.au) website?

COMPLETED

**B** Have you completed the **online training**?

It is important to ensure that you and your staff are prepared to go online with Portal Forms. The NHVR will be providing online training material through the [www.yoursaynhvr.com.au](http://www.yoursaynhvr.com.au) website to access.

COMPLETED

**C** Have you **communicated** Portal Form changes to internal stakeholders?

Have you communicated the upcoming changes to people in your team and other people in your organisation about Portal Forms?

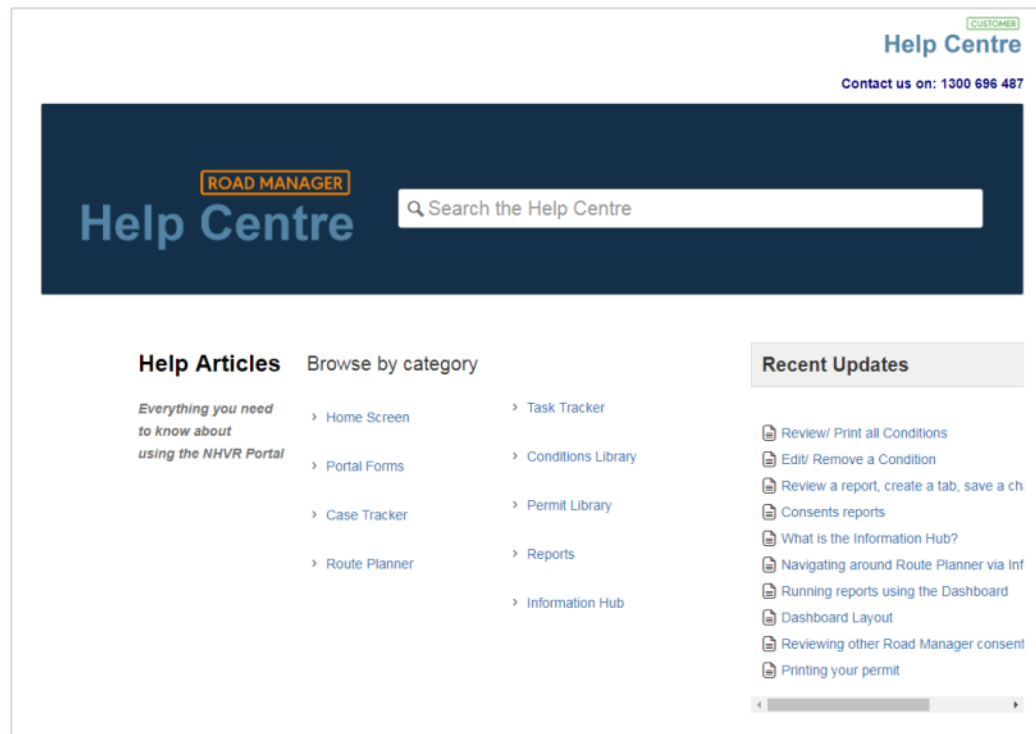
COMPLETED



Please complete the online version of this readiness checklist at [yoursaynhvr.com/getready](http://yoursaynhvr.com/getready)

# Part 4 | Your Readiness

The NHVR Portal will be supported through a hypercare service and access to **USER SUPPORT MATERIAL** that include videos, FAQs and 'how to' guides to walk through everything from basic solution navigation to performing specific tasks in the Portal.



<https://help.nhvr.gov.au/support>





**Thank You!**

For more information, visit  
[www.yoursaynhvr.com.au](http://www.yoursaynhvr.com.au)

