

South Carolina Department of Transportation



Electronic Toll Collection System & Related Services

For the
Cross Island Parkway Toll Facility
Hilton Head, South Carolina
Contract P.O.# 231709

ACCOUNT CLERK USER MANUAL

Rev. 0.0

October 1997

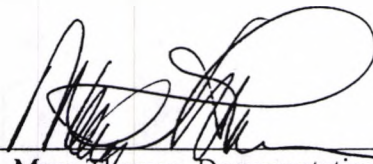
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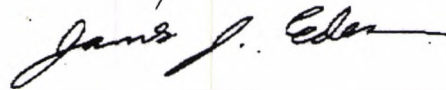
ACCOUNT CLERK USER MANUAL Rev. 0.0

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October 16, 1997

W. L. McIllwain
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P. O. Box 191
Columbia, SC 29202-0191

Re: Contract P.O. # 231709

Dear Mr. W.L. McIllwain,

Subject: Account Clerk User Manual Rev. 0.0

This transmittal contains the draft of the Account Clerk User Manual Rev. 0.0. As software is developed, some procedures may change. This will be reflected in subsequent versions.

If you have any questions, please do not hesitate to contact me.

Sincerely,

A handwritten signature in cursive script, reading "J. J. Eden".

J. J. Eden, Project Manager

CC: Tony Frate

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Introduction

The Account Clerk User Manual has been designed to assist the Account Clerk in the making the transition to the new application software that is being installed at the Cross Island Parkway Operations Building.



The document has been organized in the following manner:

Electronic Toll Collection System Overview

The following general System information is provided:

- Electronic Toll Collection System Overview - Chapter 1
- Electronic Toll Collection Equipment Overview - Chapter 2

Use of Windows Applications

For users that are inexperienced with computers and Windows applications, the following information is available:

- Using Windows Application - Chapter 7
- Using On-Line Help - Chapter 8

Use of the New Software Applications as it relates to the General Duties & Responsibilities of the Toll Collectors

- Login / Application Access / Exit Session - Chapter 5
- General Duties & Responsibilities - Chapter 3
 - ⇒ Users are shown how to use the new software applications in connection with their duties and responsibilities within the facility. This has been accomplished by presenting detailed procedures in a step by step format, beginning with the start of a shift through the end of shift.
- Policies & Regulations - Chapter 4
- Reports - Chapter 6

**1. ELECTRONIC TOLL
COLLECTION SYSTEM
OVERVIEW**

1. Electronic Toll Collection System Overview

1.1 Description

The Cross Island Parkway Toll Facilities are open to traffic and staffed by Toll Collectors twenty-four (24) hours a day, seven (7) days a week. The Cross Island Parkway Toll Collection System is designed to accommodate the rigorous demands of peak traffic hours without delays in toll collection. The system operates without loss of data in any mode of operation.

1.2 Objectives

The objectives of the Cross Island Parkway Toll Collection System are to:

- Collect tolls quickly and efficiently
- Enable rapid traffic flow through the Plaza
- Prevent loss of revenue
- Provide on-line lane audits
- Provide a user-friendly environment for operating personnel

1.3 Cross Island Parkway Plaza

The Cross Island Parkway Plaza Operations Building houses the central equipment for the Cross Island Parkway Electronic Toll Collection System. It has twelve (12) operating toll collection lanes. Three physical lanes are bi-directional as indicated below.

- The ACM collects tolls by means of an automatic coin machine mounted in a stand-alone cabinet.
- The customer displays a properly mounted AVI transponder
- The AVI / Unattended / Automatic lanes may not be operated as attended

1.4 Spanish Wells Road & Marshland Road

Spanish Wells Road and Marshland Road are single lane ramps. Both lanes are AVI / Automatic and unattended.

1.4.1 Lanes / Configuration Types

Lane	Lane Configuration	Type
10	AVI / Automatic	ACM & AVI
11	AVI / Automatic	ACM & AVI



1.5 ETC Personnel Overview

1.5.1 Customer Service Representative

- Works at the Service Center selling the Palmetto Pass
- Updates / closes customer accounts
- Takes replenishments from customers
- Reviews violation images

1.5.2 Toll Collector

- Works in the toll booth, classifies vehicles, takes toll payments, gives receipts and directions to main landmarks
- Responsible for collecting and accounting for all toll payments received

1.5.3 Senior Toll Collector

- Works in the absence of the Plaza Shift Supervisor as required.
- Works in the toll booth, classifies vehicles, takes toll payments, gives receipts and directions to main landmarks
- Responsible for collecting and accounting for all toll payments received

1.5.4 Account Clerk

- Prepares seed / device bags for Toll Collectors and Customer Service Representatives
- Counts and records deposits of toll collections from Toll Collectors and payments from Customer Service Representatives
- Prepares toll revenue for deposit
- Records all incoming and outgoing revenue transactions in the system
- Performs general office duties

1.5.5 Application System Administration

- Establishes system security controls for all personnel
- Updates and monitors system tables
- Monitors communications between Host and PC
- Performs backup, recoveries, and system connections

1.5.6 Maintenance Personnel

- Performs preventative maintenance
- Performs maintenance on the toll collection equipment
- Coordinates and monitors activities of maintenance sub-contractors

1.5.7 Toll Operations Manager

- Responsible to the SCDOT for toll operations
- Insures that toll payments are collected and revenue is accounted for
- Responsible for the complete oversight and operation of the toll plaza

1.5.8 Office Manager

- Performs Human Resources tasks as required
- Performs supervision of Service Center operations
- Reviews AVI revenue reports for inconsistencies
- Maintains inventory of all equipment and supplies

1.5.9 Toll Superintendent

Lane	Lane Configuration	Type
1	Attended AVI	AVI & MLT
2	Attended AVI	AVI & MLT
3	Attended AVI	AVI & MLT
4N	Attended AVI	AVI & MLT
4S	Attended AVI	AVI & MLT
5N	Attended AVI	AVI & MLT
5S	Attended AVI	AVI & MLT
6N	Attended AVI	AVI & MLT
6S	Attended AVI	AVI & MLT
7	Attended AVI	AVI & MLT
8	Attended AVI	AVI & MLT
9	Attended AVI	AVI & MLT



1.6 Lane Types

The Cross Island Parkway Electronic Toll Collection System utilizes two types of lanes:

- Attended AVI
- AVI / Unattended / Automatic

1.6.1 Attended AVI / Manual

- Lanes are configured for both manual and AVI toll collection
- Automatic Coin Machines (ACM) can be added to these lanes at a future date

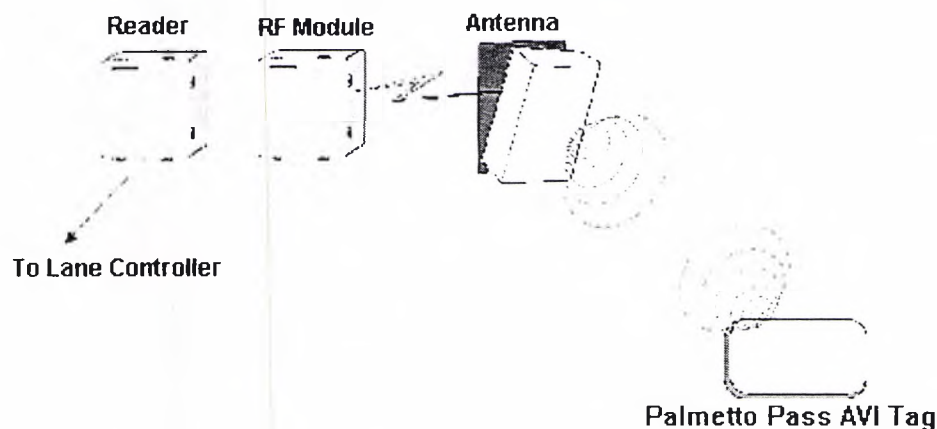
1.6.2 AVI / Unattended / Automatic

- Permit the customer to use either causeway card AVI or ACM payments
- The ACM collects tolls by means of an automatic coin machine mounted to the Toll Collector booth
- The customer swipes a causeway card through a card reader and inputs a personal identification number on a keypad
- The AVI / Unattended / Automatic lanes may be operated as unattended or attended

**2. ELECTRONIC TOLL
COLLECTION EQUIPMENT
OVERVIEW**

2. Electronic Toll Collection Equipment Overview

2.1 AVI Equipment



2.1.1 Description

The AVI subsystem consists of:

- AVI transponders (Palmetto Pass)
- Programming units
- Antenna, Radio Frequency (RF) Modules
- AVI reader devices

2.1.2 Location in Lane / Plaza

- The AVI Transponder is affixed to the patron's vehicle windshield or the front license plate. The patron can obtain a transponder from the Cross Island Parkway Service Center.
- The Programmer unit is located at the Service Center.
- The AVI antenna is located strategically in the lane so that it can capture the signal from the transponders.
- The RF module is located in the roadside AVI reader device cabinet.
- The AVI reader device is located in the roadside AVI reader device cabinet.
- The AVI equipment is located at the Cross Island Parkway plaza, Spanish Wells Road ramp and Marshland Road ramp.

2.1.3 Purpose

- The transponder is the device that the customer affixes to either their windshield or front license plate. The reader confirms a customer's account balance and decreases the account at each use by the amount of the toll.
- The programmer unit is used to enter an ID code into the transponder itself. This is done at the Service Center before issuing a transponder to the customer.
- The AVI antenna is mounted in the lane and is used to transmit and receive transponder class and account data. It interfaces with the RF module to read the signal that is sent from the transponder and sends it to the AVI reader device.
- The RF module interfaces with the AVI antenna and generates a continuous wave-signal off the antenna. When a vehicle bearing a transponder enters a lane and comes into range of the signal, the transponder detects and transmits a signal back to the antenna. The RF module accepts and transfers the return signal and sends it to the AVI reader.
- The AVI reader device reads information from the transponder mounted on the vehicle and transmits it to the Lane Controller for ID verification and sufficient account balance check. Once lane controller account verification is complete, the Lane Controller brings about the appropriate Patron Fare Display, Traffic Control Light (red, amber, or green).

2.2 Automatic Coin Machines (ACM)



2.2.1 Description

- The Automatic Coin Machine (ACM) can be either freestanding or mounted on the side of a tollbooth. Collected coins are stored in an internal vault.
- An ACM is equipped with:
 - ⇒ Patron “Payment Received” Fare Display screen
 - ⇒ Coin Hopper
 - ⇒ Escrow window which can hold up to ten (10) quarters

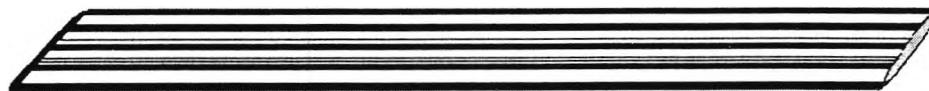
2.2.2 Location in Lane / Plaza

- The ACM is mounted in a stand-alone cabinet
- Located only at the Spanish Wells Road and Marshland Road ramps

2.2.3 Purpose

- The ACM can detect coin diameter, thickness and metallic content.
- As coins are deposited, the Patron Fare Display decrements the initial toll due by the value of each coin deposited.
- The Patron Fare Display delivers toll messages to the patron.
- Once coins are processed, up to 10 quarters are held in the escrow window, then dropped into the internal vault in the lower section of the ACM cabinet.

2.3 Entry & Exit Treadles



2.3.1 Description

Treadles are devices that are either 8' or 10' long and approximately 12" in width.

They are strategically embedded in the roadway in a toll lane and resemble a black rubber pad.

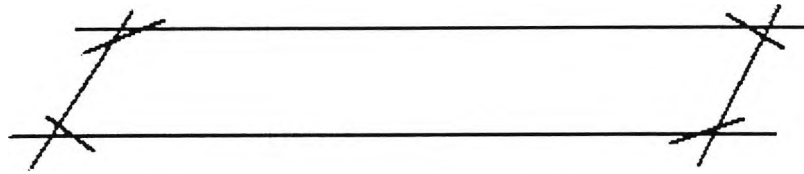
2.3.2 Location in Lane / Plaza

Treadles are located at the exit of each toll lane.

2.3.3 Purpose

- Treadles classify a vehicle by registering the number of axles.
- Each lane has an exit, two or four-contact treadles.
- The contact treadle detects forward and backward motion of a vehicle's tires as they cross the treadle.
- If a two-axle vehicle crosses the Treadle in a forward motion, two forward axles are registered, and if a two-axle vehicle crosses the Treadle in reverse, two reverse axles are registered.
- This is important for auditing purposes, particularly when there is a violation or unusual occurrence.

2.4 Vehicle Detector Entry & Exit Loops



2.4.1 Description

- A Vehicle Detector Loop is a device that is embedded into the pavement and forms a closed circuit loop.
- The detector loop's electronic properties change when a metallic presence is detected.
- The Vehicle Detector Loop is monitored by the vehicle loop detector and outputs a presence signal when it senses metal.

2.4.2 Location in Lane / Plaza

Vehicle Detector Loops are located:

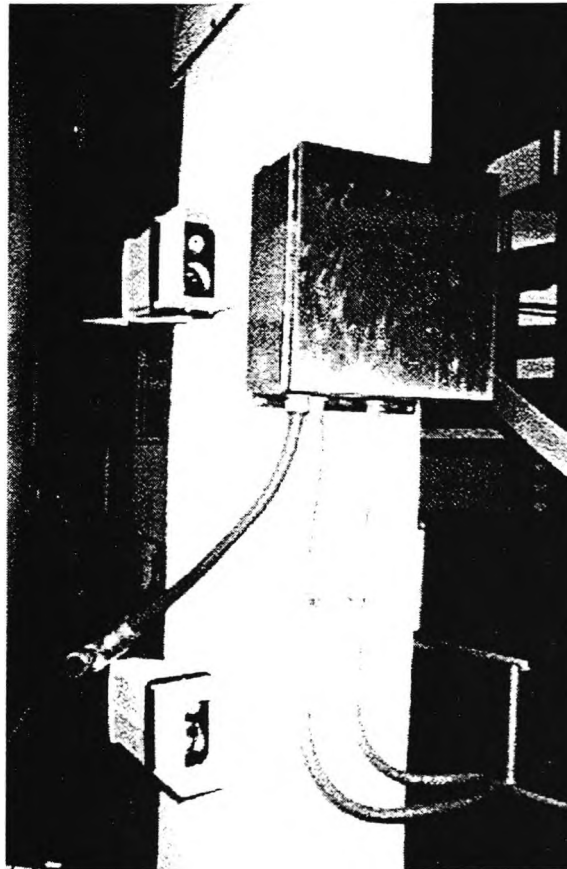
- At the entrance and exit of multi-mode lanes
- At the exit of all lanes

2.4.3 Purpose

- When a vehicle enters the lane, the entry Vehicle Detection Loop enables various lane devices:
 - ⇒ The AVI equipment
 - ⇒ The Lane Controller advises that there is a vehicle in the lane

- When the vehicle exits over the exit Vehicle Detection Loop, the following changes occur:
 - ⇒ The Island Traffic Light changes to red
 - ⇒ The VES camera takes an image capture of the license plate
 - ⇒ Lane signs return the lane to open status, ready for the next vehicle

2.5 Vehicle Separator Device — SAM Unit



2.5.1 Description

Sensing and Activating Module (SAM) is an infrared laser device. The modulated laser light is transmitted across the toll lane and reflected back from any object that it views. The output is transmitted to the Lane Controller for processing.

SAM is able to detect the following:

- Presence of a vehicle
- Direction of travel
- Velocity
- Height

2.5.2 Location in Lane / Plaza

SAM is located:

- In each multi-mode lane
- At the collection point of the toll lane

2.5.3 Purpose

SAM is similar to the Light Curtain in that it detects the separation between vehicles.

The data output is compared with the pre-classification information in the Lane Controller and ensures that the class of tag the read matches the classification of the vehicle.

2.6 Canopy Traffic Light (Red / Amber / Green)

2.6.1 Description

The Canopy Traffic Lights are visual traffic control devices that consist of a RED, AMBER and GREEN light.

2.6.2 Location in Lane / Plaza

The Canopy Traffic Lights are located:

- Mounted on the plaza canopy above the toll lane
- One both the north and south sides of the canopy in the bi-directional lanes

2.6.3 Purpose

The Canopy Traffic Light alerts approaching drivers as to the lane status — OPEN for manual toll collection and AVI (GREEN), OPEN for AVI only (Flashing AMBER) or CLOSED (RED).

2.7 Island Traffic Signal w/ Violation Light & Audible Alarm

2.7.1 Description

The Island Traffic Signal is a visual three-light, traffic control signal. The Island Traffic Signal consists of a RED light, an AMBER light and a GREEN light with a RED violation indicator mounted on the top of the housing.

2.7.2 Location in Lane / Plaza

The Island Traffic Signal is located:

- At the end of all toll lanes

2.7.3 Purpose

- The Island Traffic Signal controls the flow of traffic in the toll lane.
- The Island Traffic Signal is RED when a vehicle enters the lane.
- As the lane identifies AVI transponders, an AMBER light will appear if there is a Low Balance or other problem with the AVI account.
- The GREEN light is triggered by a successful toll collection.
- The Island Traffic Signal turns RED again once the exit loop registers the vehicle's exit.
- The RED violation beacon and the sound alarm activate when a toll violation is registered.

2.8 Patron Fare Display

2.8.1 Description

The Patron Fare Display (PFD) is a multi-flip, dot matrix display. The device uses magnetic fields and rotating magnetic disks to display messages.

2.8.2 Location in Lane / Plaza

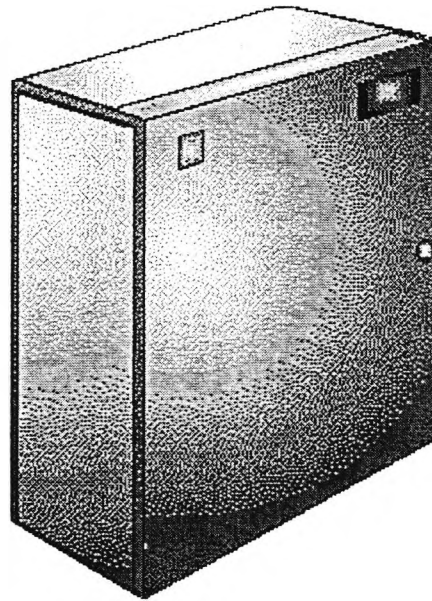
The PFD is located:

- On the left exit side of the toll lane

2.8.3 Purpose

The PFD indicates customer tolls in dollars and cents and exhibits certain messages such as "Thank You". The information displayed is determined by the signals sent from the Lane Controller.

2.9 Lane Controller Cabinet



2.9.1 Description

- The Lane Controller consists of a Pentium 586 IBM compatible PC and various input and output devices.
- The PC is used to process all of the input data and generate outputs to the various lane devices such as the island traffic light, etc.

2.9.2 Location in Lane / Plaza

The Lane Controller is located:

- In the tunnel under the Cross Island Parkway plaza.
- Within a stand-alone cabinet at the Spanish Wells Road and Marshland Road ramps.

2.9.3 Purpose

- The Lane Controller is the foundation of ALL message processing.
- The Lane Controller has customized software that controls the peripheral lane equipment.
- It is the processor that interfaces between the plaza computer and lane equipment.
- The Lane Controller is responsible for monitoring activity in the lane and for providing the appropriate output signals to the lane equipment.

2.10 Tollbooth

2.10.1 Description

The Tollbooth is the structure that houses the following toll collection equipment:

- Touchscreen
- Receipt printer
- Cash drawer
- Security alert system
- All other equipment necessary to operate these lanes manually

The Tollbooth is constructed of stainless steel.

2.10.2 Location in Lane / Plaza

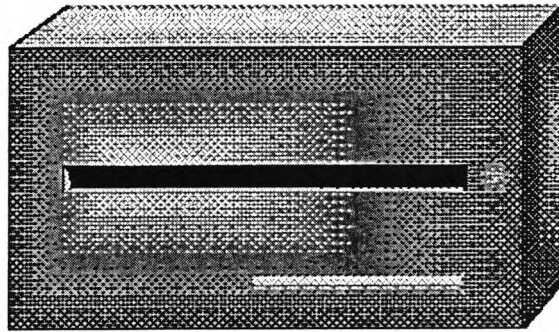
The Tollbooths are located:

- In manual and mixed mode lanes
- On the islands at the collection point
- At the Cross Island Parkway plaza only

2.10.3 Purpose

- The Tollbooth houses the touchscreen and the receipt printer, where the Toll Collector carries out toll collection functions.
- The Tollbooth is where the Toll Collector is stationed during his / her shift.

2.11 Magnetic Swipe Card Reader



2.11.1 Description

- The Magnetic Swipe Card Reader is comprised of a single reader mounted in the proximity of the Manual Lane Terminal.
- The Card Reader interfaces with the lane controller.

2.11.2 Location in Lane / Plaza

The Magnetic Swipe Card Readers are located:

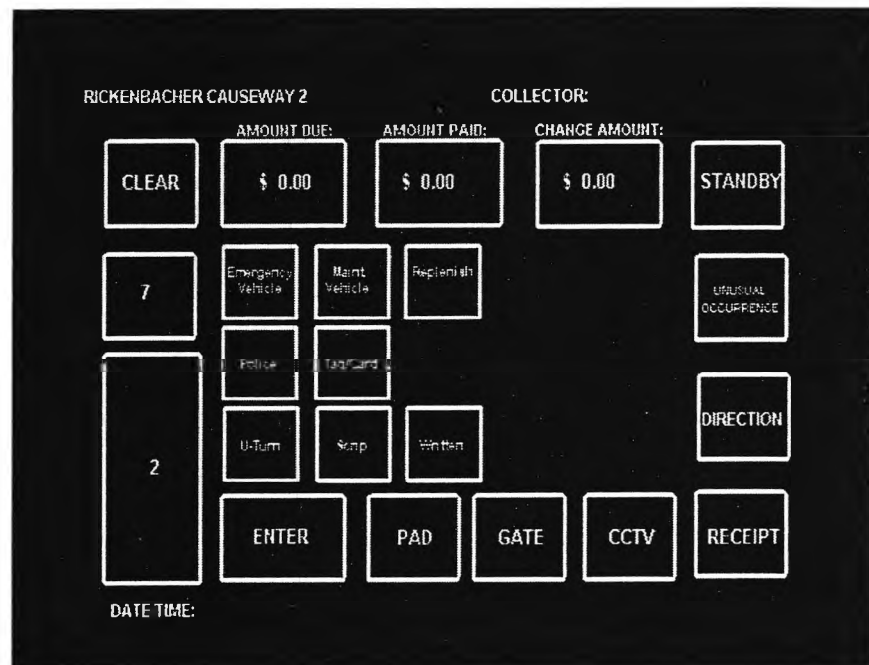
- In the Tollbooths of all Cross Island Parkway plaza lanes

2.11.3 Purpose

The Magnetic Swipe Card Reader is used by the Toll Collectors and other Cross Island Parkway personnel:

- To login into the lane controller
- To contact toll transactions involving any future use of a swipe card.

2.12 Toll Collector Touchscreen



2.12.1 Description

- The Touchscreen is an LCD display that uses an infrared grid to perform the touch location.
- The Touchscreen is housed in a rugged, water-tight housing, suitable for use in the toll environment.
- The Touchscreen interfaces with the lane controller PC.

2.12.2 Location in Lane / Plaza

The Touchscreen is located:

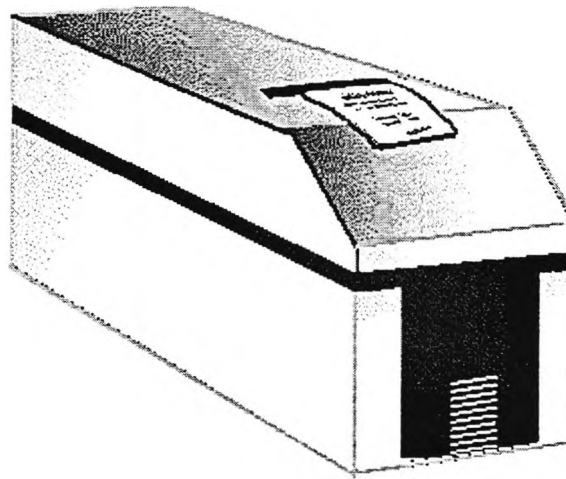
- In every manual toll collection lane
- At the Cross Island Parkway plaza only

2.12.3 Purpose

The Touchscreen features a screen display of buttons. By touching the appropriate button on the Touchscreen, the Toll Collector can:

- Classify vehicles
- Generate patron receipts upon request
- Process unusual occurrences
- Perform a variety of other functions

2.13 Receipt Printer



2.13.1 Description

- The Receipt Printer is a dot matrix printing mechanism that uses parallel communication to transmit to the lane PC.
- The Receipt Printer outputs a paper receipt upon request.

2.13.2 Location in Lane / Plaza

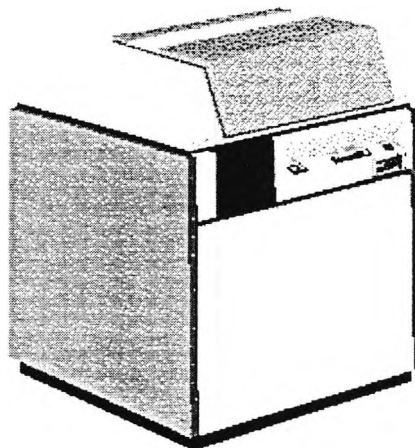
The Receipt Printer is located in:

- All manual lanes
- At the counter beside the Toll Collector Touchscreen

2.13.3 Purpose

- The Receipt Printer is installed in the Tollbooths in the manual / AVI lanes.
- The Toll Collector issues the receipt command to the Receipt Printer from the Toll Collector Touchscreen when a customer requests a receipt.
- When the paper supply is low, a “paper low” message displays on the Toll Collector Touchscreen.
- Only the Plaza Shift Supervisor or maintenance personnel will change the paper in the Receipt Printer.
- The Receipt Printer provides a paper receipt upon request with directions to locations that are commonly asked about.

2.14 Coin Counter



2.14.1 Description

- The Coin Counter is a specialized piece of equipment that counts coins.
- The Coin Counter is equipped to detect the size of all coins and count them.
- The equipment is connected to the system to record the amounts for auditing purposes.

2.14.2 Location in Lane / Plaza

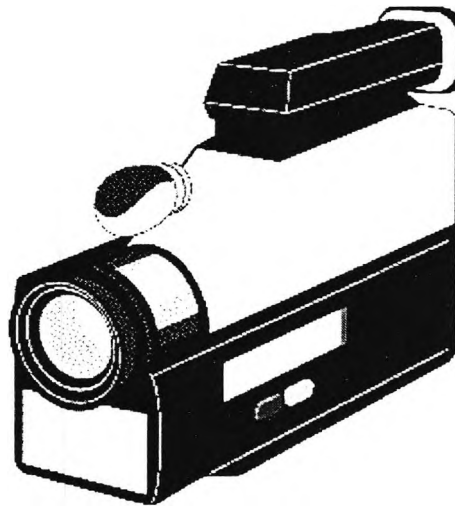
The Coin Counter is located:

- In the Cross Island Parkway Operations building

2.14.3 Purpose

- The Coin Counter is used by the Toll Collectors to count coin revenue collected in the lanes.
- The Coin Counter is used by the Toll Superintendent to count the coins deposited in the ACMs.
- The Coin Counter is used by the Account Clerk to verify the coin deposits of the Toll Collectors.
- Coins are accurately recognized by denomination and counted.
- The totals are recorded by the system.

2.15 Closed Circuit Television — “CCTV” Camera



2.15.1 Description

Closed Circuit Television (CCTV) is a system of cameras that allows the images being captured to be viewed on a television screen.

2.15.2 Location in Lane / Plaza

The CCTV cameras are located:

- In strategic locations around the plaza and remote ramps.
- In the counting, vault and other rooms within the Operations Building.
- In the Cross Island Parkway plaza tunnel.

2.15.3 Purpose

- The CCTV system is used primarily for security purposes.
- CCTV cameras are strategically located to record accesses to the building, toll collection lanes, and counting room activities.



2.16 Violation Image Capture Camera

2.16.1 Description

- The Violation Image Capture Camera is a specialized camera that captures digitized images.
- The system captures and records digitized images when triggered by pre-specified criteria.
- The Violation Image Capture Camera is encapsulated in a heavy duty housing to protect the camera from damage.

2.16.2 Location in Lane / Plaza

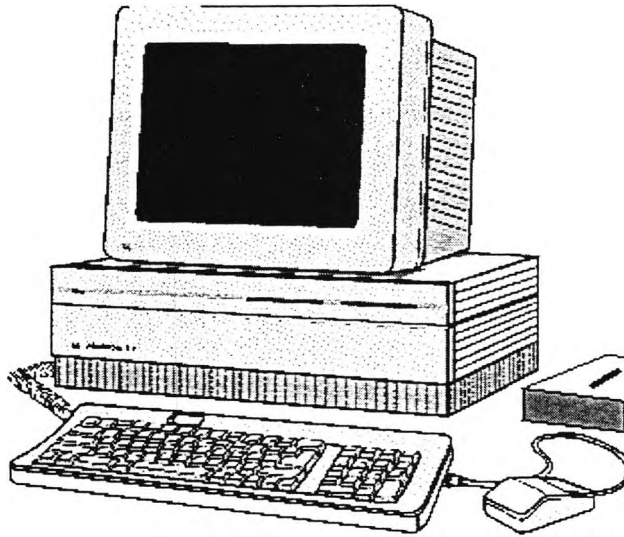
Violation Image Capture Cameras are:

- Located in each lane
- Attached to the island, beyond the Tollbooth or ACM cabinet

2.16.3 Purpose

- The Violation Image Capture Camera captures the back of each vehicle as it exits the lane.
- The system records the following vital information that is stored with each capture:
 - ⇒ Date and time of day
 - ⇒ Plaza and lane number

2.17 PC Workstation



2.17.1 Description

The standard PC workstations at the Cross Island Parkway Operations Building and satellite service center locations are:

- Mhz Pentium Processors
- mb RAM
- GB Hard Drive
- CD ROM

A magnetic swipe card reader is located next to each PC workstation. Each user must insert their card into the reader in order to gain access to the software applications.

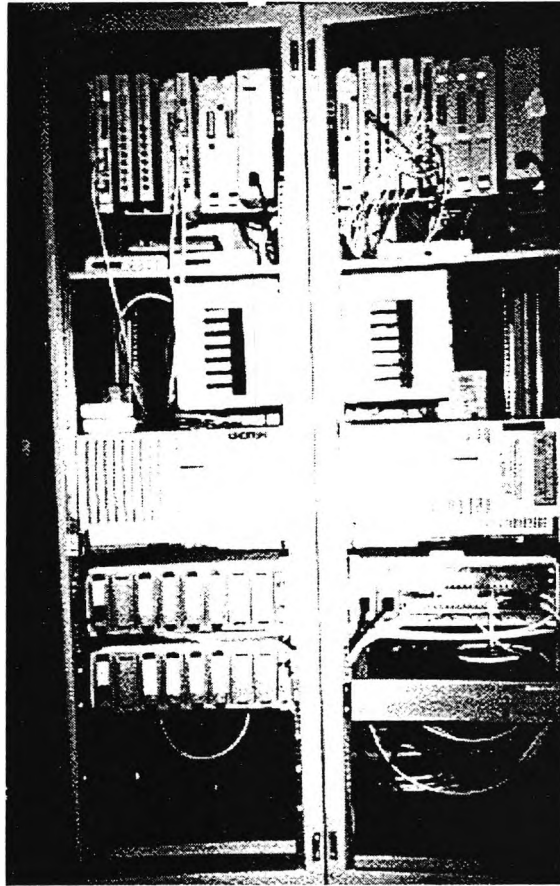
2.17.2 Location in Lane / Plaza

The PC workstations are located in the Service Center, the Toll Operations Manager's offices, at the Toll Superintendent's office, the Maintenance Shop, and the Toll Collector deposit area.

2.17.3 Purpose

The PC workstations are connected through the network to the Alpha host system. The PC workstations support the application software and communicate with the host to access and supply new data to and from the various databases.

2.18 Alpha System



2.18.1 Description

The Alpha is the host system used by the Cross Island Parkway to support the causeway's computerized system.

- Digital Alphaserver 1000
- MB RAM
- 20GB Tape
- Disks

1	RAID-5	17.1GB
1	STRIPE	8.6GB
1	SHADOW	4.3GB



2.18.2 Location in Lane / Plaza

The Alpha system is located at the Cross Island Parkway Operations Building.

2.18.3 Purpose

The Alpha system is the host system that supports the Cross Island Parkway computerized Electronic Toll Collection System. The host system houses the main 'brains' that receive, process and store all of the information that is sent through the different peripherals to the host. The peripherals are the Electronic Toll Collection Equipment, the Lane Controllers, the Service Center, VES and administrative workstations.

The databases are configured to be able to store and retrieve data upon request. This allows the county to provide a completely audible system that tracks the funds from the point that a customer pays his / her toll to the deposit of that toll into the bank.

2.19 Toll Lane Hardware Configuration

2.19.1 Description

The following diagram is a plan view of a typical toll lane at the Cross Island Parkway plaza. This is designed to show the location of the equipment in the lane.

2.20 Toll Collection Process Data Flow

2.20.1 Purpose

The following flow chart is representative of how and when the equipment is enabled in a toll collection lane when a vehicle passes through.

3. Duties, Responsibilities & Procedures

3.1 General Description

3.1.1 Record & Prepare

Prepare daily Seed Bags for Toll Collectors and Customer Service Representatives

- Prepare toll collection revenue for deposit
- Prepare armored car pick up
 - ⇒ Coins
 - ⇒ Currency - bills
- Record all incoming and outgoing revenue transactions in the system

3.1.2 Additional Duties

- Procure general office supplies
- File, light typing, and perform other general office duties
- Enter Palmetto Pass transponders and swipe cards into inventory.



Accurate counting, recording and reporting of all revenue is essential to the Parkway's goal of fiscal integrity. Account Clerks must clearly understand the importance of cash handling accuracy and fiscal integrity as they relate to revenue processing and toll operations.

3.2



At the Start of the Shift...



If an Account Clerk cannot work their scheduled shift, he / she must call the Office Manager or Toll Superintendent. See Shift Information, Section 4.1.

3.3



Retrieve Seed Bags from Safe

- Inquire as to the number of Seed Bags needed from the Toll Superintendent or Plaza Shift Supervisor on duty
- Open safe and remove number of seed bags needed for shift
- Retrieve devices and put in a revenue bag :
 - ⇒ 10 Internal Passes
 - ⇒ 2 External Mount Passes

3.3.1



Issue

- Issue Toll Collectors' seed bags to the Toll Superintendent or Plaza Shift Supervisor for distribution
- Issue Device Bag(s) to the Office Manager or Plaza Shift Supervisor for distribution to the Customer Service Representatives.



Close and lock the safe and the money room door and return the money room key to the desk drawer in the processing room until shift ends.



If the Toll Superintendent or a Plaza Shift Supervisor is not able to report to work, see Contingency Plan, Section 3.4.

3.4



Contingency Plan

If the Toll Superintendent or Plaza Shift Supervisor is not able to report to work, the Account Clerk is authorized to issue Seed Bags and Revenue Bags to Toll Collectors and Customer Service Representatives for a given shift under the following conditions:

- The Toll Superintendent or Plaza Shift Supervisor on duty is still not in at 7:00 AM.
- The Toll Superintendent or Plaza Shift Supervisor on duty called and reported he / she would be late.
- The Toll Superintendent or Plaza Shift Supervisor on duty called in sick.

3.4.1



Immediate Action

- Notify the Toll Superintendent or Plaza Shift Supervisor on duty or Toll Operations Manager that the next Toll Superintendent or Plaza Shift Supervisor will be tardy or absent for his/her scheduled shift. The Toll Superintendent or Plaza Shift Supervisor or Toll Operations Manager will call another Toll Superintendent or Plaza Shift Supervisor to cover the shift and will coordinate this with the Account Clerk on duty.
- First, assign the Toll Collector (assigned to Lane # 2) to report at lane #2 upon issuing their seed bag.
- Second, assign the Toll Collectors (assigned to Lane # 8) to report to lane #8.
- Set lanes #3, #4N, #5N, #7 and #9 for Palmetto Pass only operation.
- All other lanes remain closed.

3.4.2



Inform

- Inform the overnight Senior Toll Collector to stay in the break area to wait for the Toll Superintendent or Plaza Shift Supervisor to arrive to close out their shift
- Give the Toll Superintendent or Plaza Shift Supervisor on duty the seed bags



3.4.3



Assign

- Lanes to the Toll Collectors
- Seed / Revenue Bags to the Toll Collectors
- Seed / Revenue / Device Bags to the Customer Service Representatives



Access to assignment must be granted by the System Administrator. Training for lane and Seed / Revenue / Device Bag assignment is performed under the Toll Superintendent or Plaza Shift Supervisor Training.

For information on **Card / Pass Plans** see section 4.2.

3.5



Enter Inventory


3.5.1 Access

See Access Host / Revenue Reconciliation Application, Section 5.2.3.



Enter into Inventory only the Revenue Bags and seals that will be given to the Toll Superintendent or Plaza Shift Supervisor.



1. Click on . The following screen is displayed:

Host / Revenue Reconciliation Application

File Transaction Window Help

Deposits Revenue Bags Adjustments Reports Print Close Help Exit

Inventory Assign/Return Change Status Verify

Type

Start Number 0


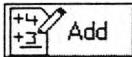
End Number 0

Numbers Inserted into Inventory


Add Save

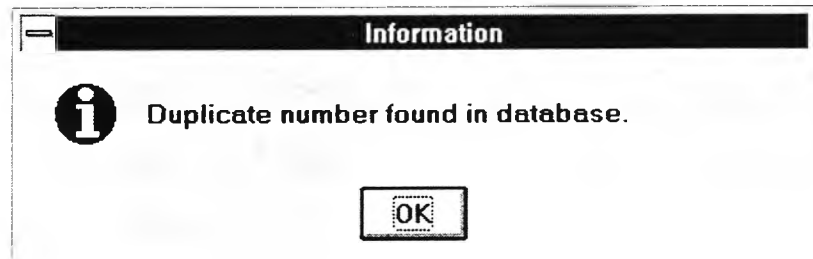
Ready May 26, 1997 1:12 pm

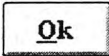
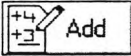
3.5.2 Enter Revenue Bags

1. Click on . Press **Tab** or click on **Start Number** field.
2. Enter the starting serial number of the block of Revenue Bags. Press **Tab**.
3. Enter the ending serial number of the block of Revenue Bags.
4. Click on . All the Revenue Bags are displayed in the data window.


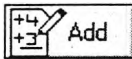


If duplicate numbers have been entered, the following  is displayed:




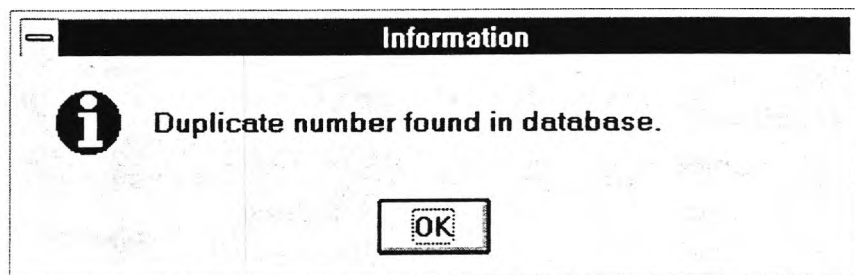
5. Click on . Modify the information entered and click on .

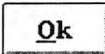
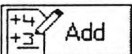
3.5.3 Enter Seals

1. Click on . Press Tab or click on Start Number field.
2. Enter the starting serial number of the block of Seals. Press Tab.
3. Enter the ending serial number of the block of Seals.
4. Click on , All the Seals are displayed in the data window.




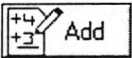


If duplicate numbers have been entered, the following  is displayed:




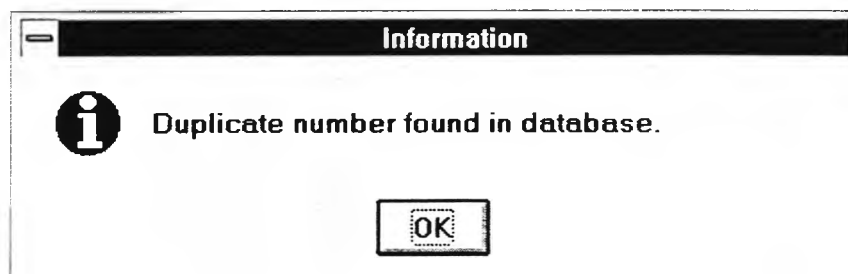
5. Click on . Modify the information entered and click on .

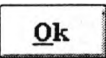
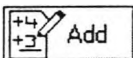
3.6 Enter Vaults

1. Click on . Press Tab or click on Start Vault Number field.
2. Enter the first Vault number. Press Tab.
3. Enter the last Vault number. Press Tab.
4. Click on the  of the  and enter the Vault Status. Press Tab.
5. Enter the Empty Weight. Press Tab.
6. Enter the Weight Capacity.
7. Click on . All the Vaults are displayed in the data window.


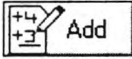


If duplicate numbers have been entered, the following  is displayed:



8. Click on . Modify the information entered and click on .

3.6.1 Enter Device Bags

1. Click on . Press Tab or click on Start Number field.
2. Enter the starting **Device Bag** number. Press Tab.
3. Enter the ending **Device Bag** number.
4. Click on . All the **Device Bags** numbers are displayed in the data window.

5. Retrieve devices and put in a device bag :

- ⇒ 10 Internal Passes
- ⇒ 2 External Mount Passes
- ⇒ 10 Cards


6. Write **Devices** on the outside of the Revenue Bag.

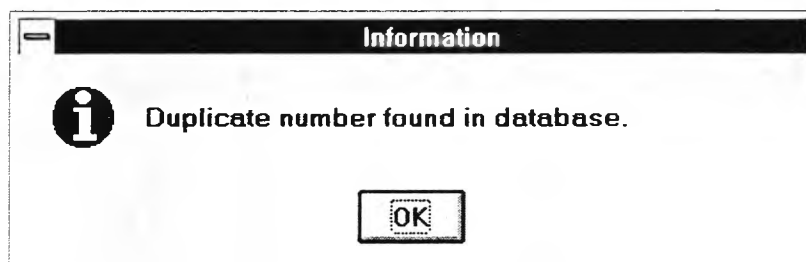
7. Place in the vault.




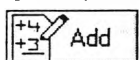
The Devices are not entered into the system inventory.




If duplicate numbers have been entered, the following  is displayed:



8. Click on . Modify the information entered and click on



3.6.2 Enter Deposit Slip Numbers


1. Click on . Press **Tab** or click on **Start Number** field.

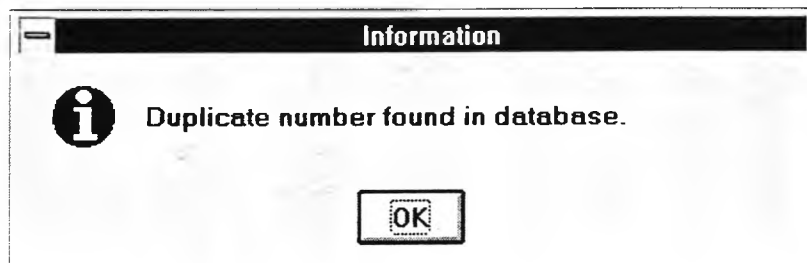
2. Enter the starting **Deposit Slip** number. Press **Tab**.

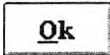
3. Enter the ending **Deposit Slip** number.

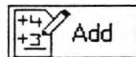
4. Click on . All the **Deposit Slip** numbers are displayed in the data window.



If duplicate numbers have been entered, the following  is displayed:




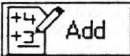
5. Click on . Modify the information entered and click on




3.6.3 Enter Bank Bags

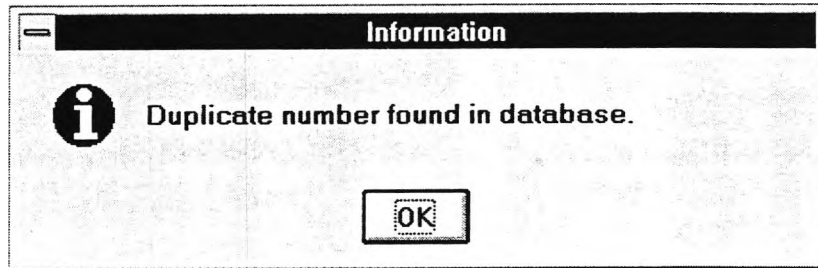


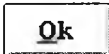
Bank Bags do not have serial numbers. Seals will be used to seal the bank bags. Enter the seals that will be used to seal the bank bag. They will not be displayed in the inventory, except in the Deposit tab folder.

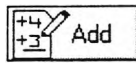
1. Click on . Press Tab or click on Start Bank Bag Number field.
2. Enter the starting Bank Bag number. Press Tab.
3. Enter the ending Bank Bag number.
4. Click on . All the Bank Bag numbers are displayed in the data window.




If duplicate numbers have been entered, the following  is displayed:



5. Click on . Modify the information entered and click on



3.6.4 Save Inventory Information


1. Click on  Save. All information that was entered is saved to the database.

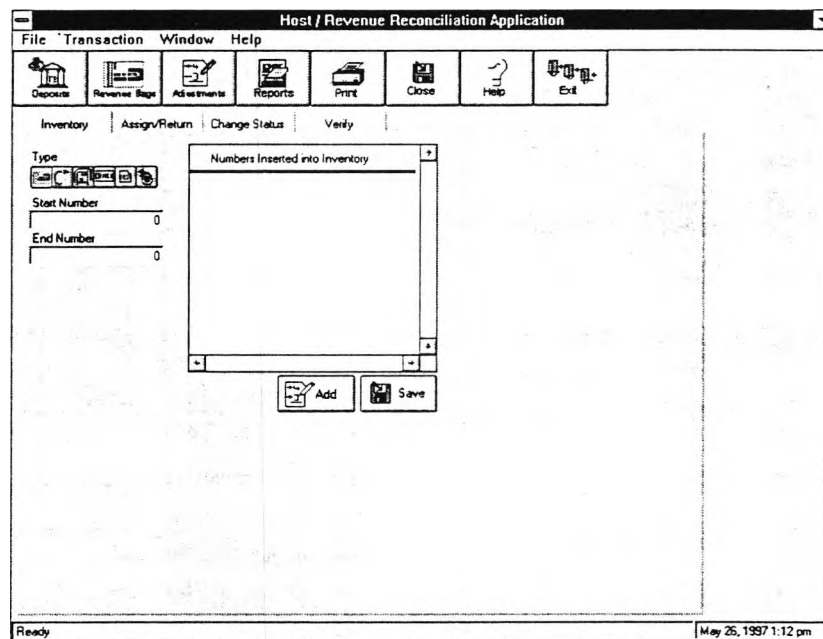
3.7 Prepare Seed & Device Bags

3.7.1 Access

See Access Host / Revenue Reconciliation Application, Section 5.2.3.
















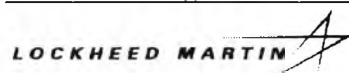
1. Click on . The following screen is displayed:






2. Click on Change Status. The following tab folder is displayed:

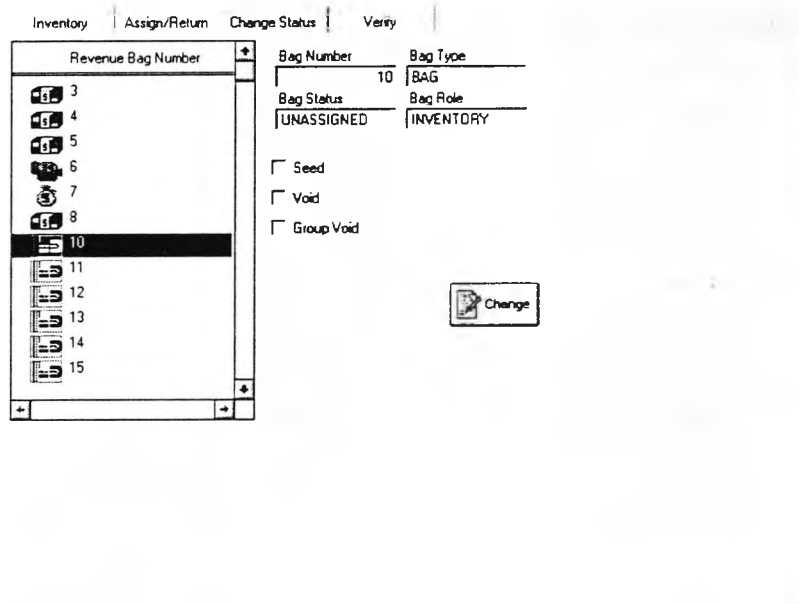
Inventory | Assign/Return | **Change Status** | Verify

Revenue Bag Number	
	3
	4
	5
	6
	7
	8
	9
	10
	11
	12
	13
	14
	15



3.7.2 To Prepare a Seed Bag


1. Manually take a  or  out of inventory and find the serial number.
2. Click on the  to find and highlight the corresponding number. The following changes are displayed on the tab folder:





Inventory	
Revenue Bag Number	
3	
4	
5	
6	
7	
8	
10	
11	
12	
13	
14	
15	



Bag Number	Bag Type
10	BAG
Bag Status	Bag Role
UNASSIGNED	INVENTORY

☐ Seed
☐ Void
☐ Group Void



3. Click on ☒ next to Seed. The Amount defaults to \$200.00.
4. Count out \$200.00 to put into the bag.
5. Click on . The **Seal** or **Revenue Bag** changes to be displayed as .

3.7.3 To Prepare Device Bags

1. Manually take a  Revenue Bag and find the serial number.
2. Click on the  to find and highlight the corresponding number.



3. Retrieve devices and put in a device bag :

⇒ 10 Internal Passes

⇒ 2 External Mount Passes

4. Write **Devices** on the outside of the Revenue Bag

5. Place in the vault.



The Device Bags are not entered into the system inventory.

3.8



Void Revenue / Device & Seed Bags


3.8.1 Access

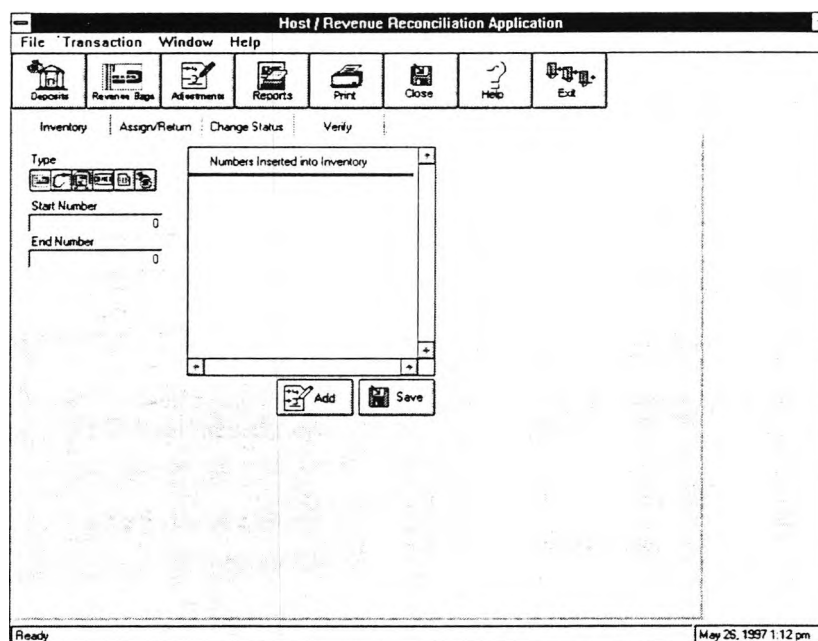
See Access Host / Revenue Reconciliation Application, Section 5.2.3.

3.8.2 Purpose

Normally, after a bank deposit is made, the Revenue Bags are automatically voided. The Void utility is used when a bag is accidentally broken or is damaged.



1. Click on . The following screen is displayed:



2. Click on Change Status. The following tab folder is displayed:

Inventory | Assign/Return | **Change Status** | Verify


Revenue Bag Number



- 3
- 4
- 5
- 6
- 7
- 8
- 10
- 11
- 12
- 13
- 14
- 15

3.8.3 To Void Revenue, Device Bags, or Seals

1. Every used Coin or Bills Bag must be voided once it has been unsealed. These are represented by bills or coins.
2. Every inventory bag or seal that has been damaged or broken must be voided.
3. Every seal that has been cut must be voided once it has been cut.
4. Select the coin bag, bill bag, revenue bag, device bag or seal that is to be voided.

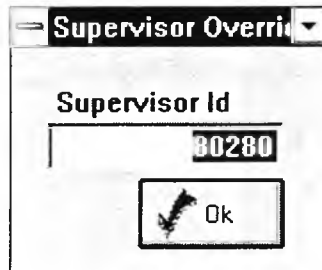
5. Click on ☒ next to Void.

Inventory	Assign/Return	Change Status	Verify
Revenue Bag Number			
<div> <div>3</div> <div>4</div> <div>5</div> <div>6</div> <div>7</div> <div>8</div> <div>10</div> <div>11</div> <div>12</div> <div>13</div> <div>14</div> <div>15</div> </div>			
Bag Number 10		Bag Type BAG	
Bag Status UNASSIGNED		Bag Role INVENTORY	
<input type="checkbox"/> Seed <input checked="" type="checkbox"/> Void <input type="checkbox"/> Group Void			
			

6. Click on . The Seal, Device or Revenue Bag changes to be displayed as a .

3.8.4 To Void Seed Bags

1. Double-click on the seed bag that is to be voided. The following pop-up window is displayed:



2. The CIP Office Manager must enter his/her Supervisor ID and click on



3. Click on . The Seed Bag changes to be displayed as a .

3.8.5 To Group Void (must be sequential)

1. Highlight the first bag.
2. Click on **Group Void**. The **Start Number** and **End Number** fields will be displayed as follows on the following screen:

Revenue Bag Number	
1118	
1166	
1177	
1186	
1187	
1190	
1200	
1201	
1202	
1203	
1204	
1205	

Bag Number	Bag Type
1187	BAG

Bag Status	Bag Role
RETURNED	COIN

☐ Seed
☒ Void
☒ Group Void

Start Number: 1187
End Number: 1188

3. The bag number selected will automatically be entered in **Start Number**.
4. Enter the **End Number**.
5. Press . The following pop-up message will be displayed:

Question

All the revenue bags in the range you just entered are going to be voided. Are you sure?

6. Click on .

3.9



Verify Revenue, Device & Seed Bags

3.9.1 Description


1. One of the Main duties of the Account Clerk is to verify the deposits that have been made by:
 - Toll Collectors
 - Customer Service Representatives
 - Plaza Shift Supervisors
2. The types of deposits that are made are:
 - Revenue Deposits
 - Vault Deposits
 - Returned Seed Deposits
 - Device Bag Deposits

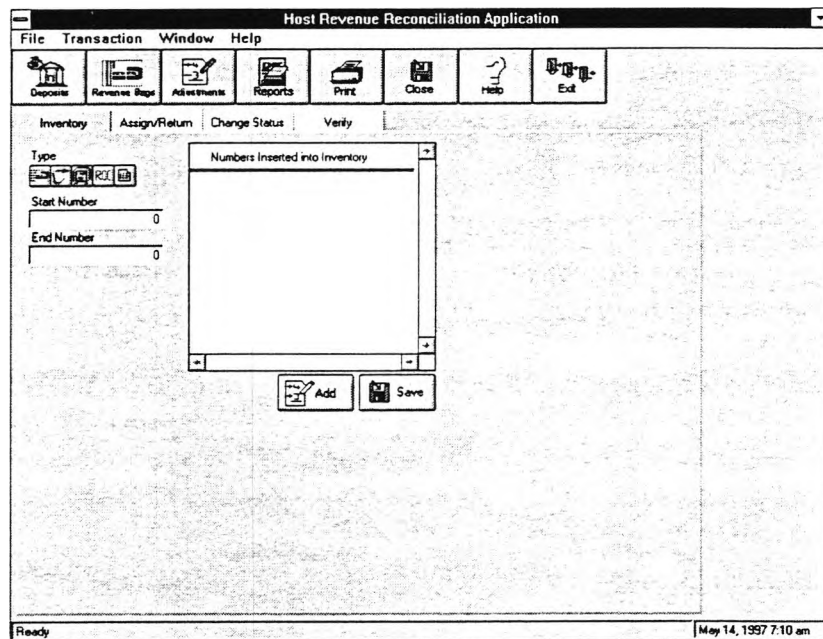
3.9.2 Access

See **Access Host / Revenue Reconciliation Application**, Section 5.2.3.

At the **Host / Revenue Reconciliation Application**:



1. Click on . The following screen is displayed:





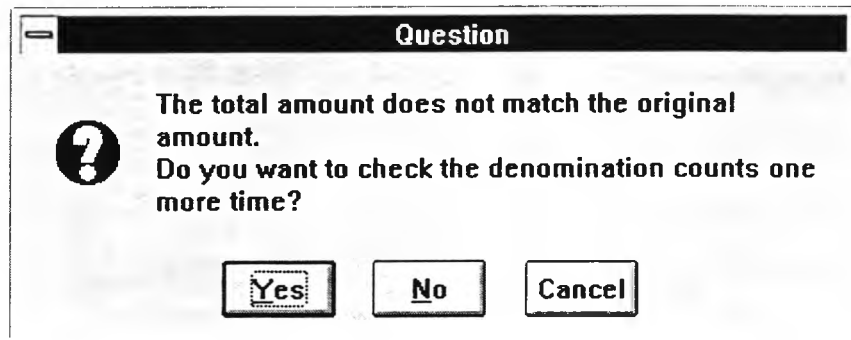
- Click on Verify. The following tab folder is displayed:




3.9.3 To Verify Revenue / Vault Deposits



- Highlight revenue bag number in **Revenue Bags To Be Verified** data window.
- Double click on the corresponding number. The number will be displayed in the **Revenue Bag Number** field. The system recognizes whether the bag is a bill, coin or returned Seed bag.
- Count money using the **Coin Counter** and the **Bill Counter**.
- Enter the amounts in the applicable fields.
- Put the money into a new **Revenue Bag**.
- In the **Revenue Bag Number** data window, find the number of the **Revenue Bag** in which the money has been placed.



7. Double click on the **Revenue Bag Number** . The system will compare the original amount and the new amount. The following  question will be displayed if the amounts do not match:





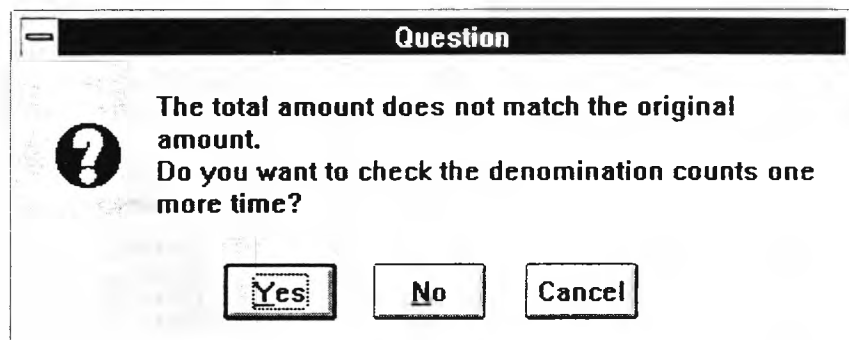
8. Click on  to re-verify.
9. Click on  to save the information. The **Revenue Bag Number** will be displayed in the lower right, with a  to display that the **Revenue Bag** has been checked.

	Revenue Bag Number	Amount	Original Bag	
	1096	\$672.00	1053	↑
	1150	\$6,884.00	1060	↓
				↑







3.9.4 To Verify Return Seed Deposits



1. Highlight **Returned Seed Bag** number in **Seed Bags To Be Verified** data window.
2. Double-click on the corresponding number. The number will be displayed in the **Seed Bag Number** field. The system recognizes it as a **Returned Seed Bag**.
3. Count money using the **Coin Counter** and the **Bill Counter**.
4. Enter the total in the applicable field.
5. Put the money into a new **Seed Bag**.
6. In the **Seed Bag Number** data window, find the number of the **Revenue (Seed) Bag** in which the money has been placed.
7. Double-click on the **Seed Bag Number** . The system will compare the original amount and the new amount. The following  question will be displayed if the amounts do not match:





8. Click on  to re-verify.

9. Click on  to save the information. The **Seed Bag Number** will be displayed in the lower right, with a  to display that the **Seed Bag** has been checked.

Revenue Bag Number	Amount	Original Bag	
 1096	\$672.00	1053	↑
 1150	\$6,884.00	1060	
			↓



3.9.5 Save

1. Click on . The  ed **Seed Bags** will no longer be displayed.
2. Repeat the verification process as necessary before exiting.

3.9.6 To Verify Device Bags

1. Open **Device Bag** and count devices, sorting by type.
2. Run the **Tag Inventory Detail & Tag Distribution Report**.
3. Verify totals against devices returned / issued.
4. Void **Device Bag** through the **Change Status** tab folder.
5. Replenish a new **Device Bag** with the designated types and amount of devices.
6. Write **Devices** on the bag with a black marker.
7. Place the **Device Bag** in the vault, ready for distribution to the Customer Service Representatives for the next shift.
8. If there is any discrepancy, inform the **Plaza Shift Supervisor** immediately.

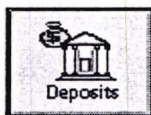
3.10 Prepare Bank Deposit

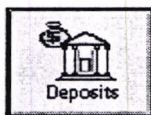
3.10.1 Description

Another one of the main duties of the Account Clerk is to prepare the Bank Deposit. The Bank Deposit requires two separate individuals: one to prepare the deposit, and the other to verify it.

3.10.2 Access

See Access Host / Revenue Reconciliation Application, Section 5.2.3.



1. Click on . The following tab folder is displayed:

Collector/Clerk/Misc./Vault Deposit | Bank Deposit

Employee ID: 00000
Revenue Bag Number:

☐ Lane Deposit
☐ Clerk Deposit
☐ Misc. Deposit
☐ Vault Deposit

Plaza: Tour Of Duty Date: Choose a Date
Shift Start Time: ☐ Bills
Shift End Time: ☐ Coins
☐ Returned Seed

Bill Count By Denominations

Ones	0
Twos	0
Fives	0
Tens	0
Twenties	0
Fifties	0
Hundreds	0
Scripts	0

PayType	Count	Amount
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Sub Total: \$ 00
Total: \$ 00





Revenue Bag Number:

Revenue Bag Number	Amount
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>



- Click on the **Bank Deposit** tab folder. The following tab folder is displayed:

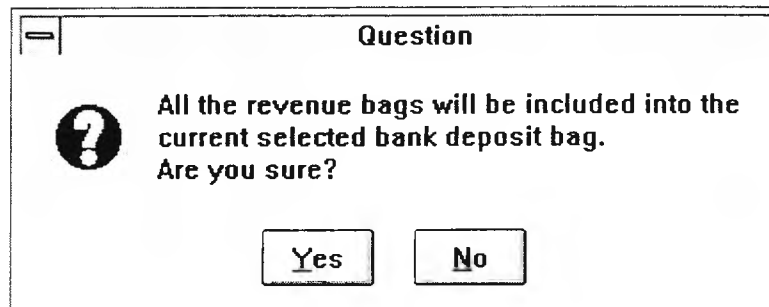
3.10.3 Process


The **Prepared By** field defaults to the Account Clerk that is preparing the deposit. This is the Employee ID of the Clerk that is logged into the system.

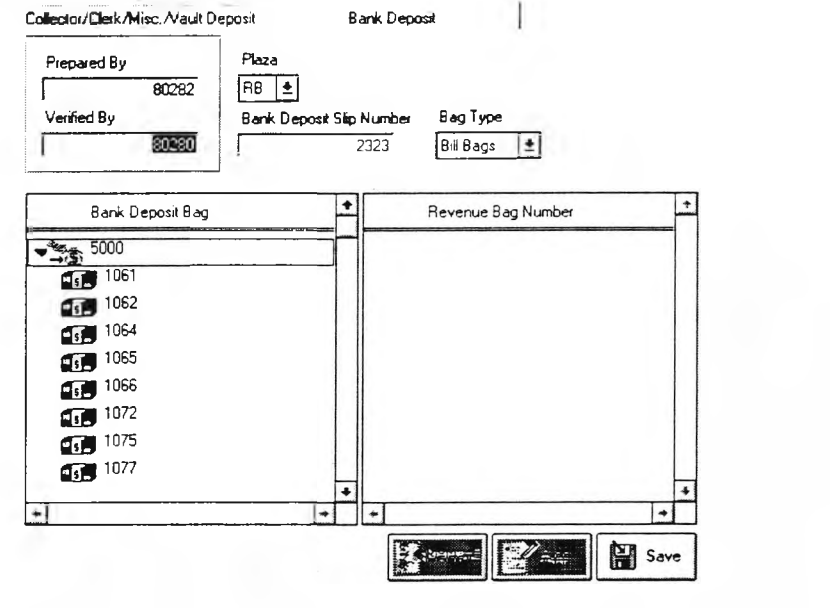
- Enter the **Employee ID** of the Plaza Shift Supervisor or Toll Superintendent that is verifying the process in the **Verified By** field.
- Click on the  of the  to select the Plaza. Press **Tab**.
- Enter the **Bank Deposit Slip Number**. Press **Tab**.
- Click on the  of the  to select the **Bag Type**. Press **Tab**.
- Highlight the **Bank Deposit Bag** that is to be used.

3.10.4 To Select All Revenue Bags

1. Click on . All the **Revenue Bags** move to the **Bank Deposit Bag** data window under the bag that was highlighted. The following  message will be displayed:



2. Click on . The following changes will be displayed in the **Bank Deposit Bag** data window:

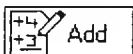


The screenshot shows the "Bank Deposit" window. At the top, there are tabs: "Collector/Clerk/Misc./Vault Deposit" and "Bank Deposit". Below the tabs are several input fields: "Prepared By" (80282), "Verified By" (80280), "Plaza" (RB), "Bank Deposit Slip Number" (2323), and "Bag Type" (Bill Bags). Below these fields are two main data windows. The left window, titled "Bank Deposit Bag", contains a list of revenue bag numbers: 5000, 1061, 1062, 1064, 1065, 1066, 1072, 1075, and 1077. The right window, titled "Revenue Bag Number", is empty. At the bottom right of the window is a "Save" button.

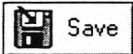
3.10.5 To Assign One Bag at a Time

1. Highlight a **Revenue Bag Number** in the **Revenue Bag Number** data window.
2. Drag and drop on previously selected bank deposit bag number.

Or

1. Highlight the **Revenue Bag Number** in **Revenue Bag Number** data window.
2. Click on  **Add**.
3. If too many **Revenue Bags** have been assigned to a **Bank Deposit Bag** return it to the **Revenue Bag Number** data window by dragging and dropping it back into the **Revenue Bag Number** data window.

3.10.6 To Save

1. Click on  **Save**. The information will be saved to the database. The **Deposit Slip** and the **Bill of Lading** are automatically printed out. Both the **Deposit Slip** and the **Bill of Lading** will have all of the Revenue Bags numbers that are being deposited.
2. Make sure that everything is bagged and sealed.
3. Place Revenue Bags in the vault with the **Deposit Slip** and **Bill of Lading**. The bank deposit is now ready for the armored car pick-up.

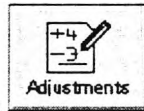
3.11 Adjust Axles & Deposits

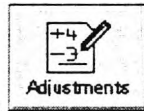
3.11.1 Description

1. If there are discrepancies between the Toll Collector's information and the system-recorded expected amount, the **Toll Superintendent** must determine the reason for the discrepancy. If the discrepancy is legitimate, (determined by the following process) then an adjustment must be made.
2. If there is a discrepancy with the Bank Deposit, adjustments must be made.

3.11.2 Access

See **Access Host / Revenue Reconciliation Application**, Section 5.2.3.



1. Click on . The following tab folder is displayed:

TOD Adjustments |

Tour of Duty Date: 17-Jun-1996

Tour of Duty for a Day

TourDuty	Collector Name
306070	Garcia, Marcos

Tour of Duty: 0 Transactions Actual: N/A Transaction Adjustment: N/A Deposits: N/A Deposit Adjustment: N/A Difference: N/A

Tour Segments

Tour Sgmt	StartDate	EndDate	Dep Rel
-----------	-----------	---------	---------


Class Deposits

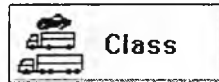
3.12 Axle Payment Adjustments


3.12.1 At the TOD Adjustments Tab Folder:

1. Run the **Tour of Duty Report** by clicking the print button.
2. Run the **Exception Report**. This report provides a list, by lane and Toll Collector of all daily exceptions that occurred on the requested date. This report assists the Toll Superintendent in determining an explanation for apparent shortages or overages.
3. Collect all of the **Unusual Occurrence Receipts** from the Toll Collector's Bill Bag.
4. At **Tour of Duty Date**, enter the applicable date if different from the default by overwriting the new date in the same format. Press **Tab**. The **Tour of Duty for a Day** data window displays all of the Tour of Duty Numbers and Toll Collectors that were recorded for the requested date.



5. Use the  to view all of the **Tour of Duty Numbers** and Toll Collectors that were recorded for the requested date.
6. Click on the **Toll Collector** name for which the adjustment is to be made. The **Tour Segments** for the Toll Collector will be displayed in the lower data window.



7. Click on  **Class**. The following window pops-up over the tab folder with **Pay Type**, **Full Value**, and **Discount Value** of the vehicle classes displayed in the first data window:

Tour of Duty		306070		Tour Segment		306740																			
Pay.Type	Full.Value	Disc.Value																							
<table border="1"> <tr> <td>Class</td> <td>Veh.Cnt</td> <td>Act.Axl</td> <td>Coll.Axl</td> <td>Pre.Axl</td> <td>Post.Axl</td> <td>Avi.Axl</td> <td>Full.Val</td> <td>Disc.Val</td> </tr> <tr> <td colspan="9" style="height: 40px;"></td> </tr> </table>								Class	Veh.Cnt	Act.Axl	Coll.Axl	Pre.Axl	Post.Axl	Avi.Axl	Full.Val	Disc.Val									
Class	Veh.Cnt	Act.Axl	Coll.Axl	Pre.Axl	Post.Axl	Avi.Axl	Full.Val	Disc.Val																	
Vehicle Class	Vehicle Count	Actual Axles	Audit Code		Description																				
0	0	0	UNAUDITED																						
Add		Delete		Save		Cancel																			

8. Click on the **Pay Type** that requires an adjustment in the upper data window. The lower data window displays the detailed information for the **Vehicle Class**, the **Vehicle Count** and the different Axle counts.








In the Cross Island Parkway System, Class = Axles.

9. Click on the line item that requires an adjustment in the lower data window. The data is displayed in the fields below the data window.

The **Vehicle Class** should remain the same. What is to be changed is either the Vehicle Count or the Actual Axles.

1. To change **Vehicle Count**, enter the number of vehicles to be subtracted as [-2], for example.
2. To change Actual Axles, enter the number of axles to be subtracted as [-4] , for example.


3. Click on the  of the **Audit Code**  and select the applicable code.
- **UNAUDITED** = All Tour of Duty deposits are unaudited.
 - **PARTIAL** = Audit was begun by the Toll Superintendent and not completed
 - **COMPLETE** = Audit completed by the Toll Superintendent
4. At **Description** enter a brief description of the reason for the adjustment.
5. Click on  **Add** . The information is updated in the lower data window.
6. If it is correct, click on  **Save** ; otherwise, make the corrections necessary. Once saved, you cannot go in and delete the incorrect data. If any corrections are to be made to the data entered, they must be made before saving. If not, this process will have to be repeated.
7. Click on  **Cancel** to close the window and return to the TOD Adjustments tab folder.
8. Rerun the **Tour of Duty Report**. Check to see that the adjustments are correct and that the report has been corrected. **If the adjustment is not correct, the complete process must be repeated.**

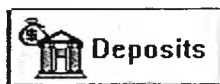
3.13 Bank Deposit Adjustments

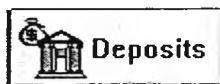
3.13.1 At the TOD Adjustments Tab Folder

1. Run the **ROC / Deposit Report**. This report provides a list of all the day's revenue deposits. This report assists the Toll Superintendent in making adjustments for shortages or overages in the bank deposit record.
2. At **Tour of Duty Date**, enter the applicable date if different from the default by overwriting the new date in the same format. Press **Tab**. The **Tour of Duty for a Day** data window displays all of the **Tour of Duty Numbers** and **Toll Collectors** that were recorded for the requested date.



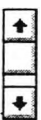
3. Use the  to view all of the **Tour of Duty Numbers** and **Toll Collectors** that were recorded for the requested date.
4. Click on the **Toll Collector** name for which the adjustment is to be made. The **Tour Segments** for the **Toll Collector** will be displayed in the lower data window.





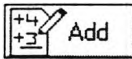


5. Click on . The following window pops-up over the tab folder with **Pay Type**, **Full Value**, and **Discount Value** of the vehicle classes displayed in the first data window:

A screenshot of a software window titled "Tour of Duty" with a sub-tab "Deposits". The window contains a table with columns: "Deposit Date", "Deposit Type", "Adj. Amount", "Audit Codes", and "Description". The first row of data shows "14-Oct-1582 18:00:00", an empty field, "0", "UNAUDITED", and an empty description. At the bottom right, there are buttons for "Add", "Delete", "Save", and "Cancel".

Deposit Date	Deposit Type	Adj. Amount	Audit Codes	Description
14-Oct-1582 18:00:00		0	UNAUDITED	



6. Use the  to view all of the **Deposit Dates**, **Types**, and **Total Value**.

7. Click on the **Deposit** in the **Deposits** data window that requires adjustment. The **Deposit Date** and the **Deposit Type** are of the deposit transaction displayed in the fields below the data window.
8. Enter the **Adjustment Amount**. This can be either a positive or negative.
 - For a **positive** adjustment, enter the amount [400.00].
 - For a **negative** adjustment, enter the amount [-400.00].
9. At **Audit Codes** click on the  of the  to enter the **Audit Code** that is applicable:
 - UNAUDITED = All Tour of Duty deposits are unaudited.
 - PARTIAL = Audit was begun by the Toll Superintendent and not completed
 - COMPLETE = Audit completed by the Toll Superintendent
10. Click on . The information is updated in the data window.
11. If it is correct, click on ; otherwise, make corrections necessary. Once saved, you cannot go in and delete the incorrect data. If any corrections are to be made to the data entered, they must be made before saving.
12. Click on  to close the window and return to the **TOD Adjustments** tab folder.
13. Run the **ROC / Deposit Report**. Check to see that the adjustments are correct and that the report has been corrected. **If the adjustment is not correct, the complete process must be repeated.**

3.14 Vault Tracking

Manual vault coin box tracking is a supplemental process used to verify information in the computer system. In the event that data is lost, or irretrievable for any reason, the manual processes will be used to report information to IMS and SCDOT. Although all of the following procedures do not specifically apply to the duties and responsibilities of the Account Clerk, any person in that position must be familiar with the procedures.

3.14.1 Vault Control Log

The Vault Control Log is used to track vault coin boxes as they move from storage, to the ramp lanes, to the Vault Room for processing, and back to storage. This is a manual form that is maintained by the Toll Superintendent and the Plaza Shift Supervisors.

Cross Island Parkway									
Vault Control Log									
			L N / C R	I N	I D	O U T	I D	P R O C	I D

VLT # - Vault ID Number
LN/CR - Lane/Cradle
IN- Time & Date Inserted
ID - Employee ID of whom inserted
OUT - Time & Date Removed
ID - Employee ID of whom removed
PROC - Time & Date Processed
ID - Employee ID of whom processed
STOR - Time & Date returned to storage
ID - Employee ID of whom returned to storage

S
T
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R

3.14.2 Weekly Inventory of Vault Coin Boxes

The Toll Operations Manager will conduct a weekly inventory of all vault coin boxes, which will include a physical inspection to determine vault coin box identities in the ramp lanes at the time of the inventory. If the Toll Operations Manager is not available to conduct the inventory on any given week, the CIP Office Manager will complete the task.

3.15 Vault Room Access

3.15.1 Unrestricted Access

The following personnel will have unrestricted access to the Vault Room:

- Toll Operations Manager
- Toll Superintendent
- Plaza Shift Supervisors

3.15.2 Restricted Access

The following personnel must be accompanied by one of the unrestricted access personnel when performing duties in the Vault Room:

- CIP Office Manager
- Account Clerk

3.15.3 No Access

The following personnel are not permitted access to the Vault Room:

- Toll Collectors
- Senior Toll Collectors
- Maintenance Technicians
- Customer Service Representatives

3.16 Coin Sorter Operations

3.16.1 Authorized Operators

The following personnel are authorized to operate the coin sorter machine for processing vault coin boxes obtained from the ramp lanes:

- Toll Operations Manager
- Toll Superintendent

3.16.2 Witness Requirement

At any time the coin sorter machine is being used to process vault coin boxes, the Account Clerk must accompany the Toll Superintendent. If the Account Clerk is not available, the CIP Office Manager or a Plaza Shift Supervisor may substitute.

3.16.3 Documentation Requirements

The Manual Coin Sorter Report is used to supplement the computer records generated when the coin sorter is operated. Completion of the Report is done by the Account Clerk or other witness when the Account Clerk is not available. The Report is used by the Account Clerk to crosscheck against the computer generated records.

3.16.4 Procedures for Coin Sorter Operation

1. The Toll Superintendent checks to make sure there is a coin bag properly placed under each coin denomination's tube.
2. The Account Clerk enters the date, time, and vault coin box ID number on the Manual Coin Sorter Report.
3. The Toll Superintendent opens the lid of the machine to make sure there are no coins already in or around the machine. See section 3.16.5 if coins are found before the initial count cycle is started.
4. The Toll Superintendent opens the vault coin box and puts the coins contained in the box into the entry tray of the coin sorter. The machine is programmed to begin the initial count cycle. The initial count cycle is run.

5. At the conclusion of the initial count cycle, the Account Clerk enters the amounts for each coin denomination, as displayed on the coin sorter, on the Manual Coin Sorter Report. The Toll Superintendent then checks for coins that were not counted during the initial count cycle. If found, these coins, whether genuine, counterfeit, or foreign, are set aside to be manually placed into the coin bags at the conclusion of the verification cycle.
6. Each coin bag containing coins is removed from the coin sorter and the coins are placed back into the entry tray for the verification cycle. The Toll Superintendent programs the machine for the verification cycle. The verification cycle is run.
7. At the conclusion of the verification cycle, the Account Clerk enters the amounts of each coin denomination, as displayed on the coin sorter, on the Manual Coin Sorter Report. The Toll Superintendent then checks for coins that were not counted during the verification cycle. If found, these coins are set aside to be manually placed into the coin bags or to be recorded as counterfeit, foreign or unaccounted for coins (see section 3.16.5).
8. All coins that were set aside because they were not counted by the machine must be hand counted by the Toll Superintendent. The Account Clerk must verify the count and enter the information onto the Manual Coin Sorter Report.

3.16.4.1 Removing Coin Bags After Verification

1. As each coin bag is removed from the coin sorter, the coins previously set aside and manually counted are placed into the appropriate coin bag.
2. Each bag must be tagged and sealed as it is removed from the coin sorter.

3.16.4.2 Tagging, Sealing and Recording Coin Bags

1. Each coin bag is sealed. The sealing process requires that an identification tag be placed on the seal prior to closing it.
2. The tag, manually filled in by the Account Clerk, lists the amount, seal number and a statement declaring that the bag contents are for deposit only in the revenue funds account number. The name of the bank and branch identification should also be indicated on the tag.

3. The content of each bag is determined by adding the verification count and the count of manually added coins. This number is recorded on the Manual Coin Sorter Report.
4. The bag seal number is recorded on the Manual Coin Sorter Report.

3.16.5 Counterfeit, Foreign and Unaccounted for Coins

- On the Manual Coin Sorter Report there are spaces to record information on the number of counterfeit (paper look-a-likes, washers, etc.), foreign, and unaccounted for coins.
- Enter the number of counterfeit and/or foreign coins in the appropriate spaces.
- Unaccounted for coins are those coins found in or around the coin sorter before the vault coin box was opened. Enter the total amount of these coins. Unaccounted for coins are deposited with coins found in the ACM machines, ACM vault cabinets, or lanes.

3.17 ACM Coin Deposits

3.17.1 Deposit Slips & System Revenue Entries

- Deposit slips for bags of coins processed from the ACM machines are completed by the Account Clerk. The deposit slip must reflect the seal number of each bag and the "said to contain amount."
- Once all the pertinent information is obtained on the coin bags, the Plaza Shift Supervisor will take possession of the bags, enter them onto the On-site Safe Log and lock them up in the vault room until the arrival of the armored car service.
- The Account Clerk will seal the deposit slips in an envelope and retain them until the arrival of the armored car service.
- The Account Clerk will then enter the information into the system. Once the system generates a receipt, the Account Clerk will sign off on the receipt and retain the Manual Coin Sorter Report and the receipt.

4. Policies & Regulations

4.1 Shift Information

4.1.1 6:30 AM - 3:30 PM Shift

4.1.1.1 Shift



Any changes to the above-mentioned shift are done at the discretion of the Toll Operations Manager.

4.1.2 Lunch Break

11:30 a.m. - 12:30 p.m.

Or

12:30 p.m. - 1:30 p.m.

4.1.2.1 Break Information

Two 15 minute breaks per eight hour shift will be allowed. The two breaks cannot be combined or taken along with a meal period.

4.1.2.2



Break Room Regulations

- Employees are required to use the break room for meals. Desk / work areas are not to be used.
- Any food brought to the toll plaza should be labeled and placed in the refrigerator.
- Employees should respect the food and drink of others that are stored in the refrigerator.
- Employees are expected to clean up after themselves and throw old food away.
- Refrigerator clean-outs will be performed periodically. Any food and / or dirty dishes left after a shift will be disposed of.

4.1.2.3



Parking

- Park personal vehicles in the fenced in parking lot.
- Bring all items required during shift into the Operations Building as the parking lot is off limits during a shift.
- If extraordinary circumstances warrant entering the parking area or a personal vehicle, the Account Clerk must be accompanied by the Toll Superintendent, Plaza Shift Supervisor or Office Manager.



4.2



Card / Pass Plans

4.2.1 Cross Island Parkway Toll Plaza Plans

4.2.1.1 Cash

- Collect cash payment in toll lane
- No discounts apply

Cash Fees:

Axle(s)	Cost
2 axle	\$0.625/axle
3 axle	\$1.50/axle
4 axle	\$1.75/axle
5+axles	\$1.80/axle

4.2.1.2 Causeway Card Plan

- Residents
- Available to non-residents, non-revenue or commercial accounts
- Discounted from cash

Axle(s)	Cost
2 axle	\$0.625/axle
3 axle	\$1.50/axle
4 axle	\$1.75/axle
5+axles	\$1.80/axle

Cash Fees:

Axle(s)	Cost
2 axle	\$0.50 / axle
3 axle	\$1.00 / axle
4 axle	\$1.25 / axle
5+axles	\$1.50 / axle

4.2.1.3 Commuter Card / Pass Plan

Commuter Card / Pass available to

- Persons employed on the island
- Students attending a school on Key Biscayne
- A parent driving a student to a school on Key Biscayne

Required Documentation

- Proof of employment on island
- Letter from employer or pay stub
- Letter from school
- Copy of current school registration

Commuter Card / Pass Fees

Commuter Card / Pass Fee 2-axle vehicle only	\$0.11 / axle
Causeway Pass Deposit	\$20.00 each Pass
Causeway Card Deposit	\$3.00 each Card
Lost Causeway Pass (Internal Transponder) Fee	\$33.00 each Pass
Lost Causeway Pass (External Transponder) Fee	\$43.00 each Pass
Lost Causeway Card Fee	\$3.00 each Card
Causeway Card / Pass Transfer	\$5.00 each transfer
Monthly Statement Fee	\$3.00
Individual Card / Pass Account Replenishment	\$ 25.00
Commercial Card / Pass Account Replenishment	\$100.00

4.2.1.4 Resident Card / Pass Plan

- Obtain proof that the customer is a Key Biscayne resident:
 - ⇒ a current utility bill
 - ⇒ vehicle registration, vehicle lease agreement, or car rental document
- Make copies of the above and return originals to the customer

Resident Card / Pass Fees

Resident Card / Pass Fee	\$0.06 / axle
⇒ 2-axle vehicle only. The applicant must be a resident of Key Biscayne.	
Lost Causeway Pass (Internal Transponder) Fee	\$33.00 each Pass
Lost Causeway Pass (External Transponder) Fee	\$43.00 each Pass
Causeway Card / Pass Transfer	\$5.00 each transfer
Monthly Statement Fee	\$3.00
Individual Card / Pass Account Replenishment	\$25.00

4.2.2 Venetian Toll Plaza Plans

4.2.2.1 Cash

- Collect cash payment in toll lane
- No discounts apply

Cash Fees

Axle(s)	Cost
2 axle	37.5 cents / axle
3+ axles	50 cents / axle

4.2.2.2 Card/Pass Plan

- Available to non-residents, non-revenue or commercial accounts
- Discounted from cash
- Magnetic Swipe Card / AVI Tag

Card / Pass Fees

Card / Pass Fee	25 cents / axle
Lost Causeway Pass (Internal Transponder) Fee	\$33.00 each Pass
Lost Causeway Pass (External Transponder) Fee	\$43.00 each Pass
Causeway Card Deposit	\$3.00 each Card
Causeway Card / Pass Transfer Fee	\$5.00 per transfer
Monthly Statement Fee	\$3.00
Individual Card / Pass Account Replenishment	\$25.00
Commercial Card / Pass Account Replenishment	\$100.00

4.2.2.3 Property Owner Card / Pass Plan

- Provide proof of property ownership
- Flat fee, unlimited trips
- Magnetic Swipe Card / AVI Tag

Property Owner Card / Pass Fees

Property Owner Card / Pass Fee	\$9.00 / year
Lost Causeway Pass (Internal Transponder) Fee	\$33.00 each Pass
Lost Causeway Pass (External Transponder) Fee	\$43.00 each Pass
Causeway Card Deposit	\$3.00 each Card
Causeway Card / Pass Transfer Fee	\$5.00 per transfer
Monthly Statement Fee	\$3.00
Individual Card / Pass Account Replenishment	\$25.00

4.3 Outside Employment

CIP personnel are permitted to accept outside employment or activities unless such activities in any way hold preeminence over CIP toll road operations, involve conflict of interest, or prevent the performance of duties on behalf of Lockheed Martin IMS.

4.4 Standards of Conduct

4.4.1 All CIP Personnel

- Will conduct themselves in a manner that reflects favorably upon the good name and reputation of SCDOT and Lockheed Martin IMS.
- Are prohibited from the use of or trafficking in narcotics or any other controlled substance. Violators may be subject to immediate dismissal.
- Are prohibited from consumption or possession of alcoholic beverages on SCDOT property. Employees reporting to work under the influence or emitting pronounced odor of intoxicating beverages are not permitted to work and may be subject to disciplinary action.
- Are prohibited from engaging in games of chance or in the sale or purchase of raffle, lottery, or sweepstakes tickets or any other form of gambling on SCDOT property.
- Are prohibited from soliciting funds for any charity or other causes on SCDOT property with prior authorization from the Toll Operations Manager.
- Are prohibited from the possession or handling of weapons on SCDOT property, including parking areas.
- Are prohibited from chewing tobacco while on duty. Smoking is prohibited except in designated smoking areas.
- Reports any change of address or telephone number within 48 hours to their immediate supervisor and the IMS Human Resources office.

4.4.2 Specific to Toll Collection Personnel

- Are prohibited from accepting gifts, tips, or any article of value from customers in payment for personal services or as a pledge of payment for tolls while on duty.
- Are prohibited from purchasing property or services of any kind from a driver or occupant of any vehicle using the CIP while on duty.
- Are prohibited from soliciting rides for or from customers using the CIP while on duty.

4.5 Training and Appraisals

4.5.1 Training

- The Toll Superintendent is responsible for ensuring that all CIP personnel have received the complete and proper training to prepare for manual toll collection. It is a requirement that all personnel, regardless of normal duty assignments, be trained in manual toll collection.
- The Accounting Clerk is responsible for ensuring that all applicable CIP personnel have received the complete and proper training to prepare for cash toll revenue processing.
- The CIP Office Manager is responsible for ensuring that all Customer Service Representatives have received the complete and proper training to prepare for service center operations.
- The On-site Installation Manager and/or Lead Maintenance Technician are responsible for ensuring that all technicians and other applicable CIP personnel have received complete and proper training for lane equipment maintenance, particularly reactive maintenance.

4.5.2 New Employee Appraisals

Toll Collectors, Senior Toll Collectors, Plaza Shift Supervisors, Maintenance Technicians and Customer Service Representatives are hired on a probationary basis. The probationary period is 90 days. At the end of the 90 days, the following appraisals will take place:

- The Plaza Shift Supervisors evaluate the Toll Collectors and Senior Toll Collectors.
- The Toll Superintendent evaluates the Plaza Shift Supervisors.
- The CIP Office Manager evaluates the Customer Service Representatives.
- The Toll Operations Manager evaluates the Maintenance Technicians will input from the Lead Technician and/or Installation Manager.

4.5.3 Annual Appraisals

Managers will follow the IMS guidelines for the timely appraisal of employees. Employees are evaluated annually.

4.6 Disciplinary Action

4.6.1 IMS Guidelines

Managers follow the IMS guidelines for appropriate disciplinary actions.

4.6.2 Documentation Requirements

Before any type of disciplinary action is taken against a CIP employee, a complete written report must be completed by the immediate supervisor and submitted to the Toll Operations Manager for review. Such a report should include written statements from witnesses when applicable.

4.7 General Office Communications

4.7.1 The Toll Superintendent

The Toll Superintendent is the main channel of communication between the toll collection personnel and all other personnel. The Toll Superintendent meets with toll collection personnel as often as is necessary to ensure an open line of communication is maintained and that changes in policies and procedures are properly disseminated.

4.7.2 The CIP Office Manager

The CIP Office Manager is the main channel of communication for the Customer Service Center operation. The CIP Office Manager meets with CSC personnel as often as is necessary to ensure an open line of communication is maintained and that changes in policies and procedures are properly disseminated.

4.7.3 The Toll Operations Manager

The Toll Operations Manager ensures that all communications from IMS and/or SCDOT are properly disseminated to appropriate personnel. To ensure an open line of communication between all CIP personnel is maintained, the Toll Operations Manager meets with the Toll Superintendent, CIP Office Manager, and Lead Maintenance Technician on a regular basis.

4.8 Safety, Security, and Maintenance

For safety and security reasons, the Cross Island Parkway Operations Building requires visitor registration, limited access by job function of CIP employees, and is not open to the general public.

Visitors are required to use the plaza (facing the lanes) entrance door, register with the on-duty Plaza Shift Supervisor, present photo identification, and may not enter secured areas or the tunnel without an authorized Parkway employee escort.

Movement within the Building by customers requiring emergency use of the restroom facilities will be closely monitored by the on-duty Plaza Shift Supervisor until the customer departs the building.

Tour groups sponsored by SCDOT or LMIMS require a minimum of 24-hour advance notice to the Toll Operations Manager or Toll Superintendent.

Employees may not bring visitors to the facility, including family members, without prior authorization from the Toll Operations Manager/designee.

4.8.1 Toll Collection Personnel

- Will report defective toll equipment to the Plaza Shift Supervisor.
- Will not be permitted to leave their assigned tollbooth during their shift except when properly relieved or in the case of an emergency. When an emergency arises, use Emergency Operating Procedures as defined in the CIP Standard Operating Policies & Procedures.
- Will not allow anyone in the tollbooth while on duty, except at the direction of the Plaza Shift Supervisor for the purpose of relief, training, maintenance or supervisory inspection.
- Should never extend a hand to accept a toll with the arm and elbow in a stiff or rigid position while the customer's vehicle is moving. The instant the Toll Collector's hand comes in contact with the customer's hand, the Toll Collector should turn or swing to the left and allow the customer's hand to immediately follow along the line of travel of the vehicle.
- Should never attempt to reach inside of any vehicle, moving or otherwise, to collect a toll.
- Should always be in a position of readiness at the toll window of the tollbooth as each vehicle enters the assigned lane. In the event that a customer loses control of the vehicle, the Toll Collector may then be in a better position to move out of the tollbooth for safety.

4.8.2 Toll Collection Personnel & Maintenance Technicians

- Should never attempt to conduct Parkway business while walking alongside a moving vehicle.
- Should never open the door of a vehicle except in the case of an emergency.
- Should never request the driver of a vehicle to push or tow another vehicle. Unless in an extreme emergency, drivers should never back up in, or back out of a lane.
- Should never request customers to get out of their vehicles to retrieve any object that may have fallen or been dropped in the lanes. CIP personnel provide a public service and should therefore offer to pick up the fallen object for the customer. However, objects should not be picked up until the vehicle is safely out of the way.

4.8.3 Plaza Shift Supervisor

- Ensures that Toll Collectors do not allow unauthorized personnel into the tollbooths.
- Is responsible for ACM vault tracking. Specific vault tracking procedures have been established and approved by SCDOT. These procedures are identified in see section 3.14 of the Standard Operating Policies & Procedures.
- Regularly monitors all tunnels, doors, lanes and buildings to ensure safety and security.
- Periodically inspects the interior of tollbooths to ensure Toll Collector safety.
- Verifies that all Toll Collectors perform all required inspections.
- Immediately reports to the Lead Maintenance Technician any defective equipment or reported maintenance requirements. Immediately reports to the Toll Superintendent any damage to facilities.

4.8.4 All CIP Personnel

- Will cooperate in every way in the proper care and maintenance of all SCDOT buildings, grounds, furniture, fixtures, and equipment.
- Will use facilities and equipment including heat, light, stationery, and similar commodities with due respect for economy, efficiency, and cleanliness.
- Will not be permitted to use a personal television set on SCDOT property. If a radio is used, the volume is expected to be kept down to a level that provides no interference while working. No earphones are to be worn when listening to the radio. No other personal electronic audio devices are permitted in the tollbooths or offices.
- Will cooperate to the fullest extent and comply with requests for assistance made by local police. The processing of traffic is of prime importance and any delays should be kept to a minimum.
- Will report each injury, no matter how slight, immediately, and secure medical treatment as directed by the Plaza Shift Supervisor. A complete report of the incident/accident is stated on the CIP Incident Report and is filed with the Plaza Shift Supervisor. All such incidents are handled in accordance with South Carolina State Law.
- Must always use the tunnel between the tollbooths and the Operations Building.
- While in the lanes, should never step off the curb unless facing approaching traffic. Must always wear a safety vest while in the lanes.
- Should always be certain that no body parts project over the curb while standing in the lanes.
- Should never offer any resistance in the event of a holdup.
- Whenever handling currency and coins, should wash hands thoroughly before eating or drinking.
- Should always use good judgement, follow established procedures, and conduct themselves in a businesslike manner.

4.9 Supplies & Equipment

All requests for the purchase of supplies and equipment will be submitted to the CIP Office Manager utilizing a purchase requisition form. It is the responsibility of all personnel to ensure that requisitions are complete and accurate before submittal. The Toll Operations Manager and the CIP Office Manager must approve all requisitions.

The CIP Office Manager is responsible for maintaining an accurate inventory of all supplies and equipment utilizing a system that ensures accuracy and weekly tracking capability.

4.10 Robberies and Threats

4.10.1 Documentation

- CIP personnel experiencing robbery attempts or threats of any kind must document the incident(s) on the CIP Incident Report.
- If a description of the individual committing the robbery or robbery attempt is available, the CIP employee involved in the incident must complete the Suspect Description Form.

4.10.2 Procedures to follow

If the CIP employee is:

- Physically challenged for the amount of a toll (e.g., threatened with physical harm unless allowed to pass through the lane), is not drawn into a confrontation. Allows the customer to pass through the lane, and immediately notifies the Plaza Shift Supervisor. Although the VES will photograph the license plate of the vehicle, the employee should attempt to get the license plate number and state as the vehicle exits the lane.
- Threatened by anyone wielding a weapon of any kind, does not resist, allows the person to pass through the lane, and immediately notifies the Plaza Shift Supervisor. Although the VES will photograph the license plate of the vehicle, the employee should attempt to get the license plate number and state as the vehicle exits the lane.
- Held up by anyone demanding money, hands the entire cash drawer over immediately, and concentrates on the description of the robber. DOES NOT HESITATE OR RESIST IN ANY MANNER WHATSOEVER. If the robber hands the cash drawer back, takes it. The cash drawer may contain the robber's fingerprints. If possible, is careful not to smudge or add fingerprints. After the robbery:
 - Call 911.
 - Look quickly for the vehicle license plate and state.
 - Note the color and make of the vehicle and any distinctive markings or features.
 - Notify the Plaza Shift Supervisor.
 - Complete the Suspect Description Form and Incident Report.

4.11 Uniforms, Clothing and Equipment

4.11.1 Standard Uniform

The standard uniform for Toll Collection, Maintenance and Service Center personnel shall include an IMS issued "golf" style shirt, light blue in color, with the name "Cross Island Parkway" embroidered across the left breast. Short-sleeved shirts will be worn during warmer weather and long-sleeved during cooler weather.

- Each full-time employee will be issued 5 shirts.
- Each employee is responsible for the laundering and care of his/her shirts.
- Shirts must be turned into the CIP Office Manager upon termination of employment.
- Each part-time employee will be issued 2 shirts.
- Employees are required to provide their own trousers.
- Denim is not acceptable.
- Multi color pants are not acceptable.
- Workout or sweatpants are not acceptable.
- Shorts may be worn in the summer months.
- Athletic shorts or swimming gear are not acceptable.
- Multi-colored or denim is not acceptable.
- A conservative length is required.

4.11.1.1 Other Clothing Requirements

All other personnel employed at the Cross Island Parkway are required to wear clothing that is considered "casual business attire."

4.11.2 Equipment

Each employee will be issued a Key Identifier Card (swipe card), which is used to gain access to the toll facilities and to log-on to the computer system. A \$5.00 replacement charge will be levied for any loss or damage to an issued card.

A padlock and key will be issued for use with a personal locker when available.

4.11.3 Equipment Issue Form

Uniforms and equipment will be issued via the Equipment Issue Form and signed for by each employee.

4.12 Scheduling

The Toll Superintendent and the CIP Office Manager are responsible for scheduling all personnel requirements to operate the Cross Island Parkway. The Toll Superintendent and the CIP Office Manager are also responsible for managing and maintaining records for attendance, punctuality, overtime, vacations, sick leave, and any other leave requests. The Plaza Shift Supervisor submits daily attendance records to the Toll Superintendent.

Toll collection is a 24-hour, seven-day-a-week, 52-week-a-year operation. Therefore it is essential that all shifts be properly staffed and supervised. IMS and SCDOT have policies in place that grant sufficient sick and vacation leave, and holiday privileges. The Plaza Shift Supervisor is responsible for setting a good example by not abusing these privileges.

- Plaza Shift Supervisor and Toll Collector schedules vary, providing for day, evening, and weekend shifts.
- Schedules are posted at least two weeks in advance.
- Any changes or substitutions must be requested in writing at least 72 hours in advance of the change to the immediate supervisor. The request is acknowledged in writing within 24 hours.
- Plaza Shift Supervisors and Toll Collectors are assigned to shifts for regular fixed hours. Generally, the policy is to honor the normally scheduled shift. However, assignments are governed by the need to ensure efficient Cross Island Parkway toll road operations. If necessary, normally scheduled shifts are changed.
- Plaza Shift Supervisors and Toll Collectors unable to report for work must notify their immediate supervisor or location of assignment two hours before the commencement of the shift. The Plaza Shift Supervisor or Toll Collector makes such reports via a personal telephone call. Telephone messages are not considered acceptable.

4.12.1 Holidays, Vacations, and Sick Leave

Holidays, vacations, and sick leave are as directed by IMS Human Resources Policies.

4.12.2 Tardiness/Absenteeism

- All personnel must be punctual at all times, are to be in uniform when appropriate, punched in, and ready to start their shift in accordance with their scheduled start time.
- Plaza Shift Supervisors are to be in uniform and ready for their assignment no later than five minutes prior to the scheduled time.
- Plaza Shift Supervisors and Toll Collectors must notify their immediate supervisor as soon as possible in the event of a delay in reporting to work.
- Plaza Shift Supervisors and Toll Collectors must not be tardy. Frequent tardiness may be subject to disciplinary action.

4.12.3 Overtime

Mandatory overtime may be required for Toll Collectors and Plaza Shift Supervisors to complete shift requirements during peak traffic or emergency situations. All full-time employees are salaried.

- Overtime compensation, when applicable, shall be straight time.
- Any period of time that is 2 hours or less, shall be considered hold-over time and not be payable as overtime.
- Plaza Shift Supervisors and Toll Collectors are offered overtime on a rotating schedule.
- The Plaza Shift Supervisors offer overtime to Toll Collectors on their shift on a rotating schedule. If no Toll Collector is available for work, Plaza Shift Supervisors can then refer to other shifts for available Toll Collectors.
- The Toll Superintendent offers overtime to Plaza Shift Supervisors on a rotating schedule.
- The schedule is kept in the Plaza Shift Supervisor's office.
- If a Toll Collector or Plaza Shift Supervisor is offered the opportunity to work overtime and refuses, the roster is marked as such, the Toll Collector or Plaza Shift Supervisor refusing overtime is moved to the bottom of the roster, and the next person on the list is contacted.
- The Plaza Shift Supervisor reviews Toll Collector overtime rosters periodically to ensure the rotation is being followed.
- The Toll Superintendent reviews Plaza Shift Supervisor overtime rosters weekly to ensure the rotation is being followed.

4.12.4 Holdover

In circumstances where it is necessary to hold over a Toll Collector or Plaza Shift Supervisor past their scheduled shift, a meal allowance is granted for periods of time in excess of four hours, providing a meal receipt is submitted.

4.13 Customer Relations

4.13.1 Purpose

This section helps the Toll Collectors, Customer Service Representatives and Plaza Shift Supervisors become professional and comfortable in dealing with the public. Most CIP personnel will come in contact with customers on a daily basis.

IMS provides Hilton Head and surrounding communities with a very special service, and IMS appreciates patron use of the toll roads. Both IMS and SCDOT want the public to feel good about using the Cross Island Parkway and the personnel that operate it.

At times it may become necessary for Plaza Shift Supervisors and other CIP personnel to collect tolls. If this occurs, all CIP personnel including the Plaza Shift Supervisors should follow the same guidelines as the Toll Collector and Customer Service Representative.

The purpose of customer relations is to:

- Promote customer satisfaction.
- Make everyone's job easier and more satisfying.

By understanding customer relations, CIP personnel know:

- How to control each transaction smoothly and quickly.
- Why customers act the way they do.
- How to manage interpersonal conflict.

CIP personnel responsibilities are:

- To present SCDOT with a professional, public image.
- To process traffic through toll lanes quickly and efficiently.
- To process customer service requests quickly and efficiently.
- To know how to handle a variety of unexpected situations.
- To provide information regarding travel routes in the general vicinity of the toll facility.
- To handout business cards and materials on the Palmetto Pass and the Cross Island Parkway when requested.

- To wear name badges, if available and to post their nameplates, if available on the tollbooth door or Service Center window while performing CIP duties.
- To give their first name pleasantly and promptly to anyone upon request.
- To handle complaints and criticism from customers in a polite manner and immediately report them. Customer complaints must be documented on a Cross Island Parkway Patron Complaint Form .
- Not to resort to abusive language or violence of any kind. In the event of an argument, ask the customer to pull safely to the side of the road and call the Plaza Shift Supervisor immediately.

Patrons walking up to a tollbooth asking for assistance must be directed to remain on the road shoulder across from the tollbooth. The Toll Collector then notifies the Plaza Shift Supervisor.

Plaza Shift Supervisor responsibilities are:

- To understand customer service.
- To wear proper uniform, dress, name badges, nameplates, etc.
- To communicate properly when dealing with the public.
- To give instructions to patrons, i.e., filling out forms, giving road directions, or other procedures.
- To deal effectively with patron complaints.

4.13.2 Greeting / Appreciation

- The Toll Collector or Customer Service Representative must greet each customer.
- The Toll Collector or Customer Service Representative should thank each customer, every transaction, every day.
- If the Toll Collector or Customer Service Center Representative says only two words to a customer is should simply be, "THANK YOU."

4.13.3 Knowledge

All CIP personnel should:

- Know what it takes to be a professional at all times.
- Know how to direct customers to destinations.
- Know how to handle emergency situations.
- Follow carefully described procedures to ensure safety. The Plaza Shift Supervisor should be notified immediately of any problem threatening safety and security.

4.13.4 Appearance

All CIP personnel must look neat at all times. Appearance of CIP personnel includes dress, looks, and manners.

Always remember:

- CIP personnel represent SCDOT and Lockheed Martin.
- Dress to convey nonverbal communication about job satisfaction.
- Neat and professional dress increases presence and authority when dealing with the public, and the public quickly feels good about Cross Island Parkway.
- A sloppy look, bad posture, or a scowling face can put the customer on the defensive, and the CIP employee's job becomes more difficult.
- Follow uniform guidelines at all times (see section 4.11).
- With the daily pressures associated with serving hundreds of people face-to-face, it can be difficult maintaining a professional outlook. Being a professional means that when customers become annoyed with the toll road for whatever reason, the CIP employee must maintain composure and continue to perform the job in the best way. The CIP employee must continue to:
 - Work efficiently
 - Think, and not feel
 - Remain in complete control
- IMS wants the public to know professional treatment can be expected at all times.

4.13.5 Accuracy

Accuracy of a Toll Collector is important because it instills confidence in the customer and ensures that all transactions are appropriately handled and accounted for. Toll collector accuracy is dependent on the following:

- Correctly classifying vehicles.
- Correctly counting the money the customer has given you.
- Providing the customer with the correct change.
- Correctly processing each transaction.

4.14 Money Losses by CIP Personnel

In the event of a loss of money other than errors in the normal collection and registration of tolls, an investigation is to be made. This investigation will determine the degree of carelessness, the work-related background of the Toll Collector, and all other extenuating factors that occurred during the shift.

Based on the results of the investigation, the Toll Operations Manager/designee makes a recommendation as to what disciplinary action is deemed appropriate. The following sections show the possible outcomes of an investigation and those actions to be taken in each case.

4.14.1 Shortages and/or Overages

In the following types of losses, disciplinary action of the Toll Collector is mandatory (except in extraordinary cases):

- Records of Toll Collector collection activities of shortages or overages are tracked in increments of two weeks. If, at end of the two-week period, the shortage is found to be excessive, the appropriate disciplinary action is taken (refer to Section 4.14.2).
- Shortages that are discovered or occur on the last day of a Toll Collector's employment.

4.14.2 Disciplinary Action

In all cases of money loss due to carelessness, disciplinary action is considered. Such action consists of a letter of warning for a first offense and more severe action for any recurrence.

In keeping with this policy, it is incumbent upon the Toll Superintendent and Plaza Shift Supervisors to notice careless practices that could lead to losses and to take steps to stop them. This means that a letter of warning could be recommended for a Toll Collector, even though no money was lost.

All Toll Collectors must remain in good standing with IMS. IMS has developed a point system as an indicator for disciplinary actions that are required to be taken. The actions listed in Table 4-1 are guidelines. Each incident is reviewed on a case-by-case basis by the Toll Operations Manager/designee for determination of the final action.

STANDARD	POINTS ISSUED	ACTION
A single deposit with an error rate of less than \$5.00	None	This is the minimum standard which should be met by all personnel.
A single deposit with an error rate of \$5.00 or greater but less than \$10.00	One Point	Letter issued by Plaza Shift Supervisor notifying employee of discrepancy and point assigned. Retraining may be scheduled.
A single deposit with an error rate of \$10.00 or greater but less than \$25.00	Two Points	Letter issued by Plaza Shift Supervisor notifying employee of discrepancy and point assigned. Retraining may be scheduled.
A single deposit with an error rate of \$25.00 or greater but less than \$40.00	Three Points	Letter issued by Toll Superintendent notifying employee of discrepancy and point assignment. Employee is put on probationary status.
A single deposit with an error rate of greater than \$40.00	Four Points	Letter issued by Toll Operations Manager notifying employee of discrepancy, points assigned, and one-day suspension (unpaid).
	Accumulation of Six Points*	IMS terminates employee.

Table 4-1 Guidelines for Disciplinary Action Enforcement

*Points are cumulative. The following are examples of the possible point accumulation and the resulting disciplinary action.



- Two 1-point discrepancies result in a two-point disciplinary action.

Example: One point was issued on January 10, 1996 because of a \$5.50 discrepancy in the daily deposit. The Plaza Shift Supervisor issues a letter notifying the Toll Collector of the discrepancy and the point. On March 15, 1996, another point was issued because of a \$6.75 discrepancy in the daily deposit. The Plaza Shift Supervisor issues a letter notifying the Toll Collector of the discrepancy and the point issued.

- One 1-point discrepancy and one 2-point discrepancy result in a 3-point discrepancy.

Example: One point was issued on January 17, 1996 because of a \$5.50 discrepancy in the daily deposit. The Plaza Shift Supervisor issues a letter notifying the Toll Collector of the discrepancy and the point. Two points were issued on February 4, 1996 because of a \$11.50 discrepancy in the daily deposit. The Toll superintendent issues a letter notifying the Toll Collector of the discrepancy and the points issued. The Toll Collector is put on probation status.

- One 2-point discrepancy and one 4-point discrepancy would result in the 6-point disciplinary action.

Example: Two points were issued on June 10, 1996 because of a \$15.25 discrepancy in the daily deposit. The Plaza Shift Supervisor issues a letter notifying the Toll Collector of the discrepancy and the points. On August 4, 1996, four points were issued because of a \$45.00 discrepancy in the daily deposit. IMS terminates the Toll Collector for accumulated points.

Toll collector's revenue and deposits are reviewed on a daily basis. If any of the established performance standards are not met, the Toll Collector is subjected to the disciplinary action described in Table 4-1.

The total points are reviewed at the time of the two-month evaluation and appraisal for employees completing the introductory period. After this evaluation and the employee assumes permanent status, any points accumulated to date are erased and the process starts over. From this point on, points are reviewed every month on a rolling six-month basis by the Toll superintendent/designee.

4.15 Emergencies

In the event of an emergency, follow the procedures described in CIP/OPP-300, Emergency Operating Plan SOP.

4.16 Key Control

4.16.1 Key Control Responsibilities

It is the responsibility of the Toll Superintendent to maintain control of all keys at the CIP facility. This includes maintaining an accurate log of where every copy of every key is located and to whom each key is assigned.

4.16.2 Safe Keys

Holding Safe keys are extremely sensitive items. Every holding safe key must be accounted for at all times. Part of the shift changeover procedures for Plaza Shift Supervisors includes signature transfer of the holding safe key. All additional holding safe keys will be kept secure in a key control box located in the Toll Operations Manager's office.

4.16.3 Key Control Box

The Toll Superintendent, Office Manager, and Toll Operations Manager may only access the key control box, located in the Toll Operations Manager's office. An access log will be kept inside the box and must be completed whenever access to the box is necessary.

4.16.4 Key Inventory

An inventory of keys will be conducted on a monthly basis. The Toll Superintendent will accomplish this. A checklist will be used to verify all keys. Copies of sensitive keys will not be requisitioned or procured without the signed authorization of the Toll Operations Manager.

The following keys are considered extremely sensitive:

- Vault Coin Boxes
- Holding Safe
- Vault Room
- Cash Drawers

4.17 Telephone Use

It is expressly prohibited that CIP personnel use office or tollbooth telephones for making personal phone calls. Prior approval by the immediate supervisor is required for emergency personal phone calls to be made. The fax machine is not to be used for sending personal faxes. All long distance phone calls or faxes must be logged on the CIP Telephone Log and be submitted to the CIP Office Manager on a weekly basis.

5. Login / Application Access / Exit Session

5.1 Login

5.1.1 Purpose

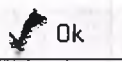
The login process provides security and access only to the users that are authorized to use the system.

5.1.2 Process

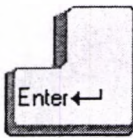
1. Double-click on the **Login** icon that is available on the **Program Manager** window.
2. The **Login** window is displayed:

3. Enter **User ID** . Press 

4. Enter the **Password** .

5. Click on 

Or

6. Press  . The **Cross Island Parkway Toll Collection System** screen is displayed with various options.
-

5.2



Application Access

5.2.1 Purpose

On the lower right-hand corner of the Main Screen are various buttons. They allow the user to access different applications after successfully logging into the system.

5.2.2 To Access the ETC Applications

1. Click on the icon to access the **Maintenance On-Line Management System - MOMS** application.
 - Maintenance Personnel (Total Access)
 - Toll Superintendent (Total Access)
 - Toll Operations Manager (Total Access)
 - Plaza Shift Supervisors (Total Access)
 - Account Clerks (View Only)
2. Click on the icon to access the **Service Center ETC Account Management System** application.
 - Customer Service Representatives (Total Access)
 - Office Manager (Total Access)
 - Toll Operations Manager (Total Access)
 - Toll Superintendent (View Access)
 - Account Clerks (Total Access)
3. Click on the icon to access the **Host / Revenue & Reconciliation** application.
 - Customer Service Representatives (Limited Access)
 - Toll Collectors (Limited Access)
 - Toll Superintendent / Plaza Shift Supervisors (Total Access)
 - Account Clerks (Total Access)
 - Toll Operations Manager (Total Access)
 - Office Manager (Total Access)

4. Click on the icon to access the **Schedule** application.
 - Toll Superintendent (Total Access)
 - Account Clerks (Limited Access)
 - Toll Operations Manager (Total Access)
 - Plaza Shift Supervisors (Limited Access)
5. Click on the icon to access the application **System Administration** application.
 - Toll Operations Manager (Total Access)
 - Office Manager / Toll Superintendent (Limited Access)
6. Click on the icon to access the **Supervisor Lane Monitor** application.
 - Toll Superintendent / Plaza Shift Supervisors (Total Access)
 - Account Clerks / Maintenance personnel (Total Access)
 - Toll Operations Manager (Total Access)
 - Office Manager (Total Access)
7. Click on the icon to access the **Supervisor Lane Monitor On-Line Help**.
 - Toll Superintendent / Plaza Shift Supervisors (Total Access)
 - Account Clerks / Maintenance personnel (Total Access)
 - Toll Operations Manager (Total Access)
 - Office Manager (Total Access)
8. Click on the icon to access **General Help**. This provides initial help on the logging in process and brief information on all of the applications.



5.2.3 Access Host / Revenue Reconciliation Application

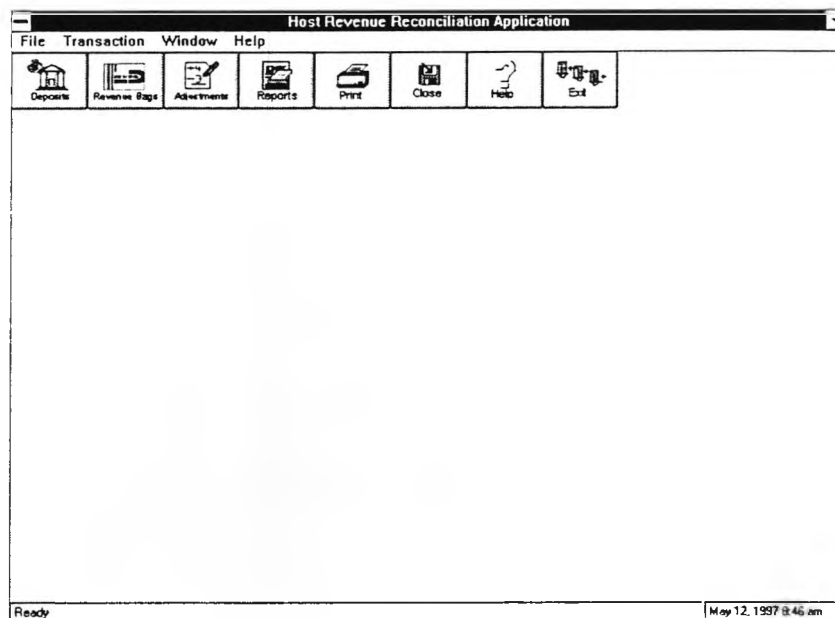
5.2.3.1 Purpose

The Host / Revenue Reconciliation application is accessed to carry out the following functions:

- Assign Seed / Revenue Bags
- Make Vault and Bank Deposits
- Reports

5.2.3.2 Access

1. Click on the icon to access the **Host / Revenue Reconciliation** application.
2. The following screen is displayed:



5.3




Exit Session

5.3.1 Purpose

Each application must be closed separately. This will return the user to the Main Screen. From this screen, the “Exit Session” button is pressed. This will close the application altogether. In order to re-enter, the user must login to the application.

5.3.2 Process




1. Click on .
2. The application closes.

6. Reports

Account Clerks are able to run specific reports that allow them to verify information and make adjustments to the data, as necessary.

6.1 Report Tab Folders



1. Click on  on the Host Revenue Reconciliation Application below:

Or

2. Click on **Transaction**. The following **Transaction** drop-down menu is displayed:



- Highlight and click on **Reports**. The following Tab Folder is displayed:

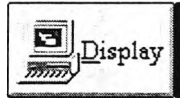
Report Name	Category
Tour Of Duty report	DAILY
Exception Report	DAILY
Detailed Transaction Report	DAILY
Daily Activity report	DAILY
Daily Activity Summary report	DAILY
Clerks Activity Report	DAILY

6.1.1 Process

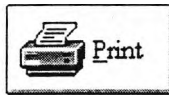
- Click on the of the **Sub-system** and highlight desired selection. Press .
- Click on the of the **Category** and highlight desired selection. Press **Tab**.
- Click on . A list of available reports under the category chosen will be displayed.
- Highlight desired report. Click on .

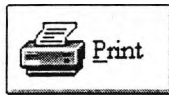
6.1.2 Display Report



Click on . The report will be displayed. To view different pages, click on **Report Page Option**.


6.1.3 Print Report



Click . The report will print to the designated printer port.

6.1.4 To Close



Click on . The report prompt screen closes and returns to the Report Tab Folder.



6.2 Report Options

Once a report has been chosen, the user has the following three options:

- Range Option
- Page Option (Screen Only)
- Layout Option (Print Only)

DTR Adjustments by Clerk

Range
☒ Day From 05/15/1996
☐ Month To 05/15/1996
☐ Year

Page
Zoom 100
First Prev Next Last

Layout
☒ Portrait
☐ Landscape

Date: 5/15/96 - Wednesday
Time: 22:17:53

DTR Adjustments by Clerk
From: May 15, 1996 To: May 15, 1996

Clerk	Type	Transaction	Time	Number	Account No/ Citation No	Tran Code	Category	Sub Category	Pay T
-------	------	-------------	------	--------	----------------------------	--------------	----------	-----------------	-------

6.2.1 Range Option

The Range option permits a Day, Month, or Year option:

1. The system defaults to **Day**:

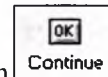
Range
☒ Day From 02/26/1996
☐ Month To 02/26/1996
☐ Year

1. To select a **Day**:

At **From**, highlight the current default date and enter new date selection.

At **To**, highlight the current default date and enter date selection.







If all other options are to remain unchanged, click on

3. To select a **Month**, click on the ☒ next to **Month**. The system displays month and year entries **ONLY**.

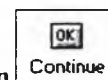
Range			
<input type="radio"/> Day	From	Jan	1996
<input checked="" type="radio"/> Month			
<input type="radio"/> Year	To	Jan	1996

At **From** use the  for the month list drop-box to be displayed. Select the month.

If the year is different from the default, highlight and enter year selection.

At **To** use the  for the month list drop-box to be displayed. Select the month.

If the year is different from the default, highlight and enter year selection.




If all other options are to remain unchanged, click on

4. To select a **Year**, click on the ☒ next to **Year**. The system disables the month option and the year option is enabled **ONLY**.

Range			
<input type="radio"/> Day	From	Jan	1996
<input type="radio"/> Month			
<input checked="" type="radio"/> Year	To	Jan	1996

At **From** highlight the default year and enter the new year, if the year is to be from the previous year to the current. Otherwise, leave alone.

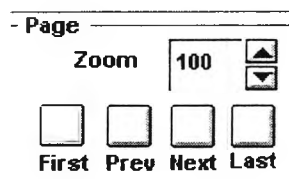
At **To** highlight the default year and enter the new year, if different from the default.



If all other options are to remain **unchanged**, click on  **Continue**

6.2.2 Page Option (Screen Only)





The Page option pertains **ONLY** to the displaying of the report on the screen.
The following options are available:

1. **Zoom:** The Zoom option can compress or enlarge the report from 50% to 200%. The steps are detailed below.




Either click on the  or  arrows to either compress or enlarge the display or highlight the number and enter the desired percentage.

The number displays the increase / decrease in the report display.

2. **First, Prev, Next, Last:** The report always displays the first page of the report. To view any of the options offered:
 - Click on the  above Next to go to the next page.
 - Click on the  above Last to go to the last page.
 - Click on the  above Prev to go to a previous page.
 - Click on the  above First to return to the first page.

6.2.3 Layout Option (Print Only)

1. The page orientation defaults to **Portrait**.
2. To modify the page orientation to **Landscape**, click on the corresponding . The report is then printed in landscape mode.

6.2.4 System Generated Forms / Labels

6.2.4.1 Credit Card Notice

The **Credit Card Notice** is a form letter that is system-generated. This is done by a batch program. The frequency of the **Credit Card Notice** will be determined by the Administrator / Accountant.

6.2.4.2 Refund Request

The **Refund Request** is a refund form that is used to process refunds. The system will print out a facsimile of this form when a patron requests a refund. The **Refund Request** is to be sent to the Accountant for processing.

6.2.4.3 Label by Master Account

The Label by Master Account must be generated through *Microsoft Access*.

1. Once in **Access**, at the tab folders, select **Reports**.
2. Click on **Preview Print** to view the labels.
3. If changes are to be made, contact the System Administrator.
4. Click on **Print**. The labels will be printed out.

6.3 Host Supervisory Reports

6.3.1 Bank Bag Assignment Report

The **Bank Bag Assignment Report** lists all employees to whom any type of seed bag has been assigned, by date.

May be accessed by:

- Toll Operations Manager
- Account Clerks
- Toll Superintendent / Plaza Shift Supervisors

6.4 Host Audit and Reconciliation Daily Reports

6.4.1 Tour of Duty Report

The **Collector Total Shift Report** selection is a report that shows a Toll Collector's total shift information for one shift. A total shift consists of all partial shift data entered during any working day for all lanes worked by a Toll Collector, Customer Service Representatives, Toll Superintendent / Plaza Shift Supervisors, and vault deposits. This report includes data on vehicle classification counts, indicated axle counts, treadle-recorded axle counts, cash transactions, token transactions, and ticket transactions. The report also reflects count out data from Collector deposits and the Supervisor / Money Counting Room deposits.

May be accessed by:

- Toll Operations Manager
- Toll Superintendent / Plaza Shift Supervisors

6.4.2 Exception Report

The Exception Report is generated for each of the specified collectors or lanes. This report provides a list, by lane and Collector, of all daily exceptions that occurred on the date requested. This report is a useful aid to the auditor in determining the explanations for apparent shortages or overages in a collector / vault's tour of duty.

May be accessed by:

- Toll Operations Manager
- Toll Superintendent / Plaza Shift Supervisors
- Account Clerk

6.4.3 ROC / Deposit Report

The **ROC / Deposit Report** provides a list of all the day's revenues that were deposited by an employee.

May be accessed by:

- Toll Operations Manager
- Account Clerk

6.4.4 Deposit Receipt Summary Report

The **Deposit Receipt Summary Report** provides a summary of all deposits made by Card / Pass customers by account number. It details the time, amounts by denomination, checks, scrip, and credit cards.

May be accessed by:

- Toll Operations Manager

6.5 ETC Account Management Transaction Reports

6.5.1 DTR by Account Report

The **DTR by Account Report** presents a detailed listing of all transactions which occurred within a specified date range grouped by CSR ID and sorted by individual account numbers. Totals for each Account Clerk and a grand total are also reported.

May be accessed by:

- Toll Operations Manager
- Office Manager
- Account Clerk
- Toll Superintendent / Plaza Shift Supervisors

6.5.2 DTR by Transaction Number Report

The **DTR by Transaction Number Report** presents a detailed listing of all transactions which occurred within a specified date range grouped by CSR ID and sorted by transaction number. Totals for each Account Clerk and a grand total are also reported.

May be accessed by:

- Toll Operations Manager
- Toll Superintendent / Plaza Shift Supervisors
- Account Clerk
- Office Manager

6.5.3 DTR by Transaction Type Report

The **DTR by Transaction Type Report** presents a detailed listing of all transactions which occurred within a specified date range grouped by CSR ID and sorted by transaction type.

May be accessed by:

- Toll Operations Manager
- Toll Superintendent / Plaza Shift Supervisors
- Account Clerk
- Office Manager

6.5.4 DTR NSF Checks Report

The **DTR NSF Checks Report** presents a detailed listing of all NSF fee transactions which occurred within a specified date range grouped by CSR ID. Totals for each Account Clerk and a grand total are also reported.

May be accessed by:

- Toll Operations Manager
- Toll Superintendent / Plaza Shift Supervisors
- Account Clerk
- Customer Service Representative

6.5.5 DTR Refunds Report

The **DTR Refunds Report** presents a detailed listing of all refund transactions which occurred within a specified date range grouped by CSR ID. Totals for each Account Clerk and a grand total are also reported.

May be accessed by:

- Toll Operations Manager
- Toll Superintendent / Plaza Shift Supervisors
- Account Clerk
- Customer Service Representative
- Office Manager

6.5.6 DTR Adjustments Report

The **DTR Adjustments Report** presents a detailed listing of all adjustments which occurred within a specified date range grouped by CSR ID and sorted by transaction number. Totals for each Account Clerk and a grand total are also reported.

May be accessed by:

- Toll Operations Manager
- Toll Superintendent / Plaza Shift Supervisors
- Account Clerk
- Office Manager

6.5.7 DTR Reversals Report

The **DTR Reversals Report** presents a detailed listing of all reversals which occurred within a specified date range grouped by CSR ID and sorted by transaction number. Totals for each Account Clerk and a grand total are also reported.

May be accessed by:

- Toll Operations Manager
- Toll Superintendent / Plaza Shift Supervisors
- Account Clerk
- Office Manager

6.5.8 Daily ETC Transactions Report

The **Daily ETC Transactions Report** lists each toll transaction occurring for the specified bridge. The date / time and the toll amount is reported for each transaction. This report is sorted by plaza and lane.

May be accessed by:

- Toll Operations Manager
- Toll Superintendent / Plaza Shift Supervisors
- Account Clerk
- Customer Service Representative
- Office Manager

6.5.9 ETC Transaction Summary Report

The **ETC Transaction Summary Report** presents a listing of the tolls, replenishments, and collector totals for a given day in a given lane.

May be accessed by:

- Toll Operations Manager
- Toll Superintendent / Plaza Shift Supervisors
- Account Clerk
- Office Manager

6.5.10 Report of Account by Tag Number

The **Report of Account by Tag Number** details the account number, tag status, replenishment method, name, address, and telephone number, sorted by AVI tag number.

May be accessed by:

- Toll Operations Manager
- Account Clerk
- Customer Service Representative
- Office Manager

6.6 ETC Account Management Status Reports

6.6.1 Rebill Analysis Report

The **Rebill Analysis Report** presents the data used in the calculation of the current rebill amount. An initial rebill amount is set upon account opening. Each month the rebill amount is adjusted based on the average of the previous three months of toll usage.

May be accessed by:

- Toll Operations Manager
- Toll Superintendent / Plaza Shift Supervisors
- Account Clerk
- Customer Service Representative
- Office Manager

6.6.2 Rebill Transaction Report

The **Rebill Transaction Report** lists the rebill requests and the status of these requests for a given date range. Credit card or bank account data is also listed.

May be accessed by:

- Toll Operations Manager
- Toll Superintendent / Plaza Shift Supervisors
- Account Clerk
- Customer Service Representative
- Office Manager

6.6.3 Credit Denied Report

The **Credit Denied Report** lists the accounts in which credit was denied for the indicated billing request date. The reason code for the credit denial is also shown. The report is sorted by account number.

May be accessed by:

- Toll Operations Manager
- Toll Superintendent / Plaza Shift Supervisors
- Account Clerk
- Customer Service Representative
- Office Manager

6.6.4 Credit Card Status Report

The **Credit Card Status Report** lists the account information for all customers whose credit card expires in the specified date range. Day and night phones are listed for situations in which the Toll Superintendent / Plaza Shift Supervisors require customer communication.

May be accessed by:

- Toll Operations Manager
- Toll Superintendent / Plaza Shift Supervisors
- Account Clerk
- Customer Service Representative
- Office Manager

6.6.5 Summary Account Status Report

The **Summary Account Status Report** lists the account information for all customers in a specific account type or who opened an account in a specified date range or who closed an account in a specified range. Day and night phones are listed for situations in which the Toll Superintendent / Plaza Shift Supervisors require customer communication.

May be accessed by:

- Toll Operations Manager
- Toll Superintendent / Plaza Shift Supervisors
- Account Clerk
- Customer Service Representative
- Office Manager

6.7 ETC Account Management Daily Reports

6.7.1 Daily Activity Report

An individual **Daily Activity Report** is generated for each specified CSR, sorted by session id. This report will group each financial transaction that occurred within the grouped session. A total amount per session and a grand total will be reported.

May be accessed by:

- Toll Operations Manager
- Toll Superintendent / Plaza Shift Supervisors
- Account Clerk
- Customer Service Representative
- Office Manager

6.7.2 Daily Activity Summary Report

An individual **Daily Activity Summary Report** is generated for each specified CSR, and sorted by session ID. This report will show, for each session, the amount debited and credited to each general ledger account. A total for each session and a grand total will be reported.

May be accessed by:

- Toll Operations Manager
- Toll Superintendent / Plaza Shift Supervisors
- Account Clerk
- Customer Service Representative
- Office Manager

6.7.3 Clerks Activity Report

The **Clerks Activity Report** totals the transactions performed for each Account Clerk at the specified Service Center. The transaction types totaled are financial transactions, non-financial transactions, number of adjustments, and number of reversals. This report can be used for performance appraisal.

May be accessed by:

- Toll Operations Manager
- Toll Superintendent / Plaza Shift Supervisors
- Account Clerk
- Customer Service Representative
- Office Manager

6.8 ETC Account Management Monthly Reports

6.8.1 Monthly Account Statement Report

The **Monthly Account Statement Report** is used to produce monthly statements for ETC customers upon request. This report is similar to the batched statements produced. Each payment and toll transaction is listed, deriving the customer's current account balance.

May be accessed by:

- Toll Operations Manager
- Toll Superintendent / Plaza Shift Supervisors
- Account Clerk
- Customer Service Representative
- Office Manager

6.8.2 Monthly Summary of Accounts Report

The **Monthly Summary of Accounts Report** summarizes the financial transactions associated with each account. Financial totals summarized are opening toll balance, deposits, toll usage, tag deposit, fees, and fines. Totals for all accounts are also computed and shown.

May be accessed by:

- Toll Operations Manager
- Toll Superintendent / Plaza Shift Supervisors
- Account Clerk
- Customer Service Representative
- Office Manager

6.9 ETC Account Management Tag Inventory Reports

6.9.1 Tag Inventory Detail Report

For each tag in the specified tag id range, the **Tag Inventory Detail Report** itemizes information related to each tag. Information listed includes: the account, last transaction data, current status, and the internal tag id. This report is sorted by tag status.

May be accessed by:

- Toll Operations Manager
- Toll Superintendent / Plaza Shift Supervisors
- Account Clerk
- Office Manager

6.9.2 Tag Distribution Report

The **Tag Distribution Report** shows total number of tags for each account in each of the various tag statuses. A total number of tags is also given.

May be accessed by:

- Toll Operations Manager
- Account Clerk
- Office Manager

6.10 ETC Account Management Violations Reports

6.10.1 VES Event Reconciliation Report

The **VES Event Reconciliation Report** provides a list by the Account Clerk of the results of all reviewed VES event images: no problem, ticket should be issued, a problem with the collector, etc.

May be accessed by:

- Toll Operations Manager
- Toll Superintendent / Plaza Shift Supervisors
- Office Manager

6.10.2 Violation Occurrence Report

The **Violation Occurrence Report** provides all pertinent violation information for a given date range including: the date, time, plaza, lane, collector identification number, license number and state, external tag identification number, tag status and violation number. Violation numbers are also cross-referenced to the lane serial number.

May be accessed by:

- Toll Operations Manager
- Toll Superintendent / Plaza Shift Supervisors
- Office Manager

6.10.3 Violation Status Report

The **Violation Status Report** provides the following information: violation status, violation number, plate number, plate state, violation date and time, account number, sub account number, violation amount, amount due, lane and plaza.

May be accessed by:



- Toll Operations Manager
- Toll Superintendent / Plaza Shift Supervisors
- Office Manager

6.11 At the End of the P.M. Shift...

6.11.1 At the End of the Night




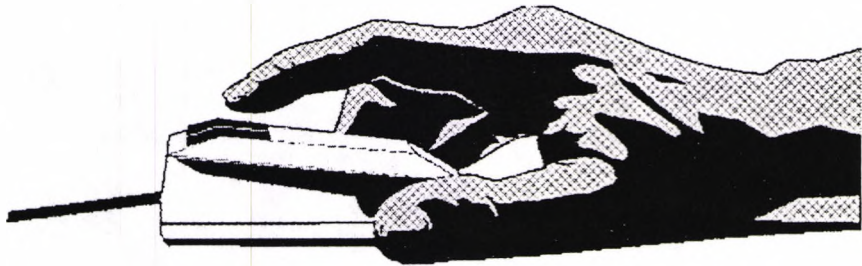
Take money and room key from the desk drawer in the Toll Superintendent / Plaza Shift Supervisor's (processing) room and


drop the key  in the safe .

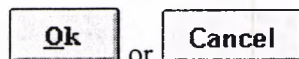
7. Using Windows Applications

7.1 Using a Mouse

A  is used to 'Point and Click' at objects on the computer screen or windows within the screen.



1. Place your hand over it so that your index finger rests on the left button.
2. Move the  over the mouse pad to move the cursor across the screen.
3. Place the cursor over the buttons on the screen, for example:



Or

☐ radio button

Or

the  on List Drop Box 

4. Press the left button down. This is called a "Click".

5. When instructed to **“Double-click”**, quickly press the left button twice in succession.




7.2




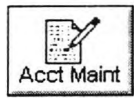
Menus & Toolbars

The menus and toolbars are displayed on the screen. Click on any one of the buttons or main menu names to access help directly from this screen.

7.2.1 To Use the Main Menu Bar

1. Use the  and click on the main topic that is to be accessed. A drop-down menu is displayed.
2. Click on the process that is to be carried out to access the correct window.

7.2.2 To Use the Main Toolbar

1. Use the  and allow the pointer to rest on any of the buttons such as  .
2. Click on the left mouse button to open the window that corresponds to the function that is to be used.

7.3



Tab Folders

When each process is opened, a set of tab folders is displayed. This allows the user to view all of the sub-processes that can be carried out and allows simple access to each.

7.3.1 Process


A series of **tab folders** is displayed when any of the processes are opened. The **Open Account** tab folders are displayed as an example:

Demographics	SubAccounts	Replenishments	Vehicles	Device Request	Plan
Account Type	Agency	Account No.	Social Sec. No.		
PRIVATE					

When the system opens a subsystem, it will default to the first tab folder, displaying the folder information.

7.3.1.1 To Change to a New Folder within the Subsystem



1. Using the , click on the new tab folder title located at the top of the folder.
2. The open folder will close and the new folder will open.





7.4



List Drop Box Selections

List Drop Boxes are white fields characterized by an arrow button to the right. The List Drop Boxes are designed to allow the user to view authorized values and select the one that best applies.

7.4.1 To Use a List Drop Box

1. Click on the  on the right of the List Drop Box. A list of authorized entries will drop-down from the field.
2. With the , click on the desired selection to highlight. The List Drop Box closes, displaying the selection in the field.

7.5





Data Windows

In many of the Tab Folders there is a data window. This area displays data that is entered into the system.

7.5.1 To View All Selections in a Data Window

If there are more selections than those displayed in the data window, there are scroll bars on the right side and at the bottom of the window.

1. Click on the , holding down the left mouse button. This causes the data window to scroll, displaying all authorized entries.
2. To scroll up, click on the  of the scroll bar.

7.6




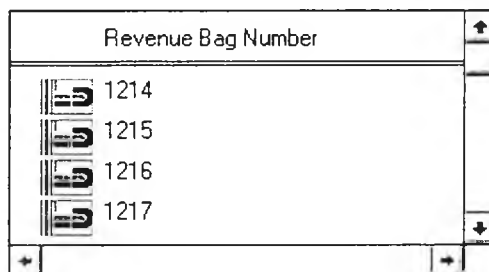
Scroll bars



Scrollbars are used in several distinct places:

- List Drop Boxes
- On-Line Training
- On-Line Help

7.6.1 To Use a Scroll bar in a List Drop Box



1. Click on the  on the right of the List Drop Box. A list of authorized entries drops down from the field.



2. When there are more selections than those visible in the data window, a scroll bar on the right side of the List Drop Box is displayed (as shown).
3. Click on the , holding down the left button of the mouse. This causes the List Drop Box to scroll, displaying all authorized entries.
4. To scroll up, click on the .
5. Highlight desired selection.
6. The List Drop Box closes, displaying the selection in the field.



7.6.1.1 To Use a Scroll bar in On-Line Training, On-Line Help or the Application

1. When there is more text than is visible in the data window, a scrollbar on the right-hand side of the help screen is displayed.
2. Click on the  , holding down the left mouse button. This causes the text to scroll, displaying additional information.
3. To scroll up, click on the  .

7.7



Buttons & Hotkeys

There are three button types:

- Toolbar Buttons
- Command Buttons
- Radio Buttons




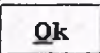
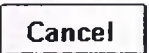
7.7.1 How to Use Toolbar Buttons

Toolbar buttons bring up an application window.

1. Place cursor on toolbar button. A small balloon pop-up is displayed describing the function of the button.
2. Click on the button to open corresponding window.

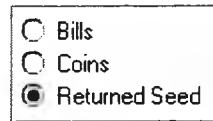
7.7.2 How to Use Command Buttons



Command buttons are usually displayed at the bottom of a window. They are used to save, cancel or delete information entered in that window.

1. Click on the command button to carry out a save, cancel or delete function in a window.
2. Normally a ,  or  pop-up displays, requiring the user to click on  or .



7.7.3 How to Use Radio Buttons

Radio buttons allow a selection within the application.





1. A radio button is displayed as .
2. Click on the radio button . A black dot is displayed in the center of the button and the function is triggered.

7.7.4 How to Use Hotkeys

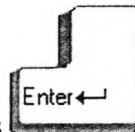
Hotkeys are made available to the user that prefers using a  to a . The hotkeys can be used instead of buttons or drop-down menus.

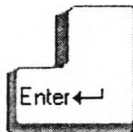
1. On the Main Toolbar, each Main Menu title has a letter underlined, for example File.
2. Press <Alt> F. The **F**ile menu drops down.

Use the arrow   to move up and down the menu until the desired selection is highlighted.

Or

Press <Alt> * (* represents the hotkey letter of the menu item selection).



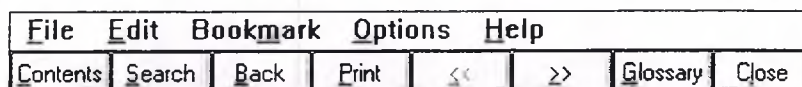
3. Press . The selected window is displayed.

8. Using On-Line Help

8.1



Toolbar Buttons





The toolbar shown above can be used to get detailed information on each function. Each button is described in the following section.

8.1.1





Contents

The  provides the top level topic of all functions in the On-Line Help application.

1. Click  on the top help toolbar to return to the contents at any time.



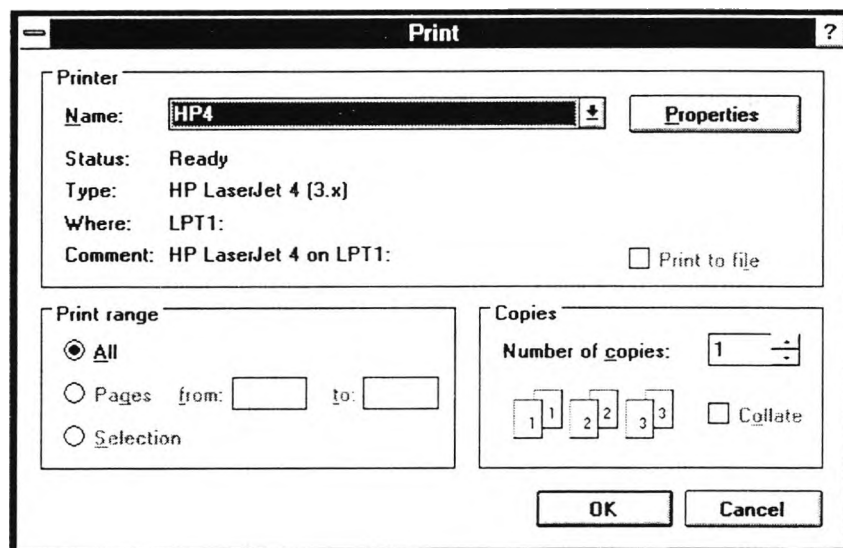
2. Use the  to view a complete listing.
3. Click  at the top toolbar to return to the main **Help Basics** window.

8.1.2

Print

Print

1. Click **Print** to print the topic that is active.
2. The following Print window is displayed:



3. If **Print** is pressed in error or a decision was made **NOT** to print the topic, click **Cancel**.
4. Click on **Ok** to print the topic.
5. Click **Back** at the top toolbar to return to the main window.

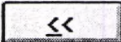
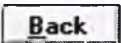
8.1.3

Back



Back

1. Click **Back** to return to a previously viewed topic.
2. Click **Back** at the top toolbar to return to the main window.

8.1.4 Back Browse Button <<

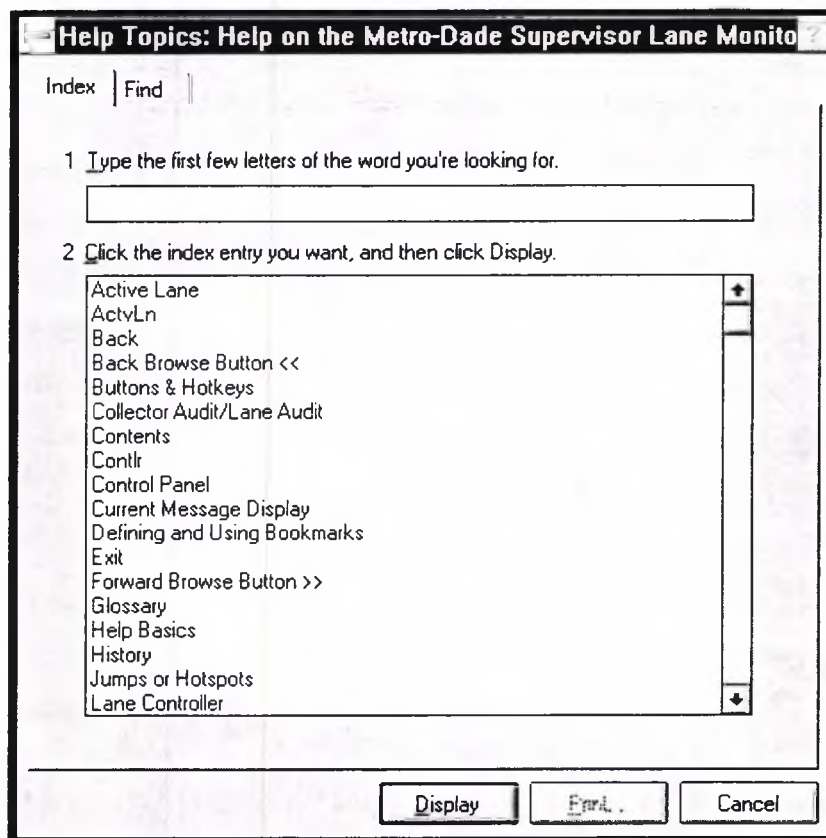
1. Click  to go back one screen at a time in topic sequence.
2. Click  at the top toolbar to return to the main window.

8.1.5 Forward Browse Button >>

1. Click  to go forward in topic sequence.
2. Click  at the top toolbar to return to the main window.




8.1.6 Search

1. Click  to display the following window:



8.1.6.1 Index




1. Type in a word or phrase or use the  to locate the desired subject.
2. Click . The On-Line Help jumps directly to the subject.
3. Click  at the top toolbar to return to the main window.

8.1.6.2 Find

1. For a more narrow search, click on the **Find** tab folder.
2. Type in a word or phrase in the **first** data window.

Either





use the  to locate a word in the **second** data window

Or




use the  to locate a topic in the **third** data window.

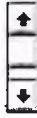
3. Click . The On-Line Help jumps directly to the subject.
4. Click  at the top toolbar to return to the main window.

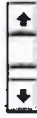

8.1.7

Glossary

Glossary

1. Click **Glossary** to view the alphabetically listed terms that are defined within the system.
2. The terms are underlined with a broken dotted line and have a definition  that will pop-up.



3. Use the  to find the term. The terms are in alphabetical order.
4. Place the cursor on the term. The cursor now displays as a . Click on the term to jump to the system function dealing with the term.
5. Click **Back** at the top toolbar to return to the main **On-Line Help Course** window.

8.1.8

Exit

Exit

1. Click **Exit** to close On-Line Help.
2. The file closes.
3. Click **Back** at the top toolbar to return to the main **On-Line Help Course** window.

8.2 Special Features

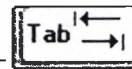
8.2.1 If Statements

All contingencies, or **If statements** are printed in red. The purpose is to alert the user that within the steps of the procedure, the contingencies are to be followed only if applicable.

8.2.2 Jumps or Hotspots

1. All Jumps / Hotspots are green and underlined with a broken line.
2. Graphics can function as **Jumps** or **Hotspots**, see Section 8.3.

3. To display all jumps in a topic, press CTRL +



8.2.3 Secondary Windows


1. Under each **How to Access** is a window name that is Green. Double-click on the word and the Secondary Window will be displayed on the right hand side of the screen.
2. Click on the button to open the secondary window and more detailed information will pop-up over the main window.
3. For more information, see **Secondary Windows**, section 8.4.

8.3




Jumps or Hotspots

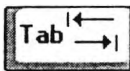
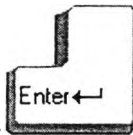
Help topics can include graphics and text that link to other Help topics or to more information about the current topic. These are called jumps.

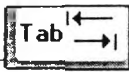
1. Jumps are identified by bold colored text and solid underline.
2. When pointing to a jump, the pointer changes to a hand shape .

8.3.1 To Choose A Jump

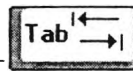
1. Point to the text or graphic, and click with the left  button.

Or

press  to select the jump, and then press .

2. Press **SHIFT** +  to move backward and select a jump.
3. If the jump chosen is linked to another topic, that topic appears in the Help window.
4. Sometimes a jump is linked to information that appears in a pop-up window or a secondary window. See section 8.4 for **Secondary Window**.
5. When information is displayed in a pop-up window, the size of the pop-up window is proportional to the size of the main Help window.

Note: To enlarge the pop-up window, change the size of the main Help window.

6. To display all jumps in a topic, press **CTRL** + .

8.3.2 To Close A Pop-Up Window








Click anywhere on the screen, or press any key.

8.4



Secondary Windows

Another type of link that is used in the On-Line Help is 'Secondary Windows'. The following links are used to create Secondary Windows:

1. Under each Process are buttons stating, "To change plaza, use the  to click on Trends." Click on the button to open the secondary window.
2. Click on the secondary window link and a secondary window will pop-up over the main window giving the specified procedure. Two buttons linked specifically to the secondary window are displayed at the top,  and .
3. To close, click .
4. To print the 'secondary window', click .
5. In order to enlarge the window, click  in the top right-hand corner of the screen. The window will fill the screen and permit full view of the windows.
6. To return to original size, click  in the top right-hand corner of the screen. This will return the window to its original size.

8.5



Defining and Using Bookmarks

Just as bookmarks can be placed in a book to mark specific references, bookmarks can be placed in Help topics that are used frequently. After placing a bookmark in a topic, the topic can be accessed quickly from the Bookmark menu.

8.5.1 Placing a Bookmark in a Topic

1. From the Bookmark menu in Help, choose Define.
2. In the Bookmark Name box, the topic title appears. If you want to use a different name to identify the bookmark, type a name in this box. Otherwise, the topic title that appears will be the name it is identified as the bookmark.
3. Click on the **OK** button.
4. The bookmark name now appears on the Bookmark menu in Help.

8.5.2 Viewing a Bookmark in a Topic

1. From the Bookmark menu in Help, choose the bookmark name for the topic to be viewed.
2. Underlined numbers precede the first nine bookmark titles.
3. Type the corresponding number to go quickly to a marked topic.
4. If more than nine bookmarks have been defined, choose **More** from the Bookmark menu in Help.
5. Select a bookmark in the **Go To Bookmark** box, and then choose the **OK** button.

8.5.3 Removing a Bookmark

1. From the Bookmark menu in Help, choose **Define**.
2. Select the bookmark to be removed.
3. Choose the **Delete** button.
4. The bookmark name is removed from the Bookmark menu in Help.

Glossary of Terms

ACM

Automatic Coin Machine

AVI

Automatic Vehicle Identification

CCTV

Closed Circuit Television

ETC

Electronic Toll Collection

ID

Identification

LCD

Liquid Crystal Display

MLT

Manual Lane Terminal

MOMS

Maintenance On-Line Management System

PC

Personal Computer

PFD

Patron Fare Display

LOCKHEED MARTIN 

SCDOT Account Clerk User Manual Rev. 0.0
SC_DOT\Acct_Clrk\Rev_0.0\Acct_Clrk.doc
Proprietary Data

RF

Radio Frequency

SCDOT

South Carolina Department of Transportation

VES

Violation Enforcement System

VMS

Vehicle Message Sign