County Driver Issuance Training Checklist

This checklist is intended for all county driver issuance staff. Each topic is categorized by skill-level, and a list of training resources has bene provided to act as a guide.

Skill-Level:
1. Beginner
2. Intermediate
3. Advanced

Please email all completed checklists to mvd.learninganddevelopment@iowadot.us.

Trainee Information:

_____   _____   _____   _____
Employee Name   **County**   **Date of Hire**   **Employee Email Address**

_____   _____
County Treasurer   **County Phone #**

Onboarding

Trainer Name: _____   Training Location: _____

Skill - Level	Topic	Employee Initials	Trainer Initials	Date
1	Complete Commercial Certified Knowledge Examiner (CCKE) Online Training			
1	Attend New Hire Orientation in Ankeny			
1	Attend Driver Issuance Basics Workshop in Ankeny			

Equipment and Basic Systems Overview

Trainer Name: _____   Training Location: _____

Skill - Level	Topic	Employee Initials	Trainer Initials	Date
1	**DL Issuance Machine Operation:** • Start Up/Shut Down Issuance Machine • Operate AutoTest and test units • Scanner • Load Printers			
1	**Systems overview and access:** • ARTS • EMREMS • ERMS • Web Enrollment			
1	**Resources:** Employee understands how to utilize, search, and navigate their issuance resources. • Iowadot.gov • ARTS On-line and Examiner manuals and Help menu • County DOT Issuance Website			
1	**ARTS Basics:** • Employee understands and knows how to create profile in ARTS • Employee understands and knows how to set cash drawer in ARTS • ARTS On-line and Examiner manuals and Help menu • Employee understands and knows end of day cash drawer consolidation procedure in ARTS			

1	**ARTS Navigation:**
	• Train by tab in ARTS and how it relates to the issuance functions
	• How to use dropdowns in ARTS to locate proper pre-qualifiers
	• Locate Driver Credential History, Driving Record, License Management, non-operator ID Management
	• Perform an exhaustive search and filtered search in ARTS
	    o Various name combinations
	    o Social security number/DL/customer number
	    o Confidence rating of the search results (authentic or unique, OTH "other")
	    o Create/add a new customer when a customer search returns record(s) that are not a match			

Basic Issuance Training

Trainer Name: _____   Training Location: _____

Skill - Level	Topic	Employee Initials	Trainer Initials	Date
1	**Basic Issuance- Identification Requirements:** • Documents required to establish date of birth, identity and lawful status or presence • Documents required to establish social security number and double SSOLV process • Documents required to establish Iowa residency and residential address • Documents required to establish name change (if required) and double SSOLV process			
1	**Basic Issuance- Foreign Nationals:** • Access and utilize VLS Online resources available in ARTS • Difference between permanent and temporary residents • VLS Document Library: Documents required to verify residency • VLS Training and User Manual: Issuance rules for foreign nationals • Issuance foreign nationals in ARTS • Properly document IAV requests and review returned responses			
1	**Basic Issuance- Vision Machine/Screening:** • Access and utilize ARTS Online Medical and Vision Training Materials • Operating procedures • Employee screens vision/practices with team members • Screening acuity/peripheral standards/restrictions • Doctor statements/reading/adding restrictions • Referrals to vision specialist or sanction			
1	**Basic Issuance- Customer data entry in ARTS:** • Entering customer's data exactly as it appears on the documents presented (legal vs. alias) • Utilize both upper- and lower-case letters when entering the customer's name and address			
1	**Basic Issuance- Capture customer photo:** • Policy on when to take the photo • Policy on hats/glasses/smiling/hair in eyes • Check for photo quality • Facial recognition • Understanding of how ARTS and web enrollment work together			

Skill - Level	Topic	Employee Initials	Trainer Initials	Date
1	**Basic Issuance- Deliver and review preview document with customer:** (Prior to interim document/Pay Now stage) • Review preview document • Verify name, mailing address, DOB, expiration date, type and restrictions, if applicable • Explain mailing procedure 30 days • Steps required when customer has not received their license			
1	**Basic Issuance- Duplicate License:** • ID requirements • Duplicate reason • Understands fees			
1	**Basic Issuance- Fee Detail:** • Collects proper fees required for credential • Correct application tab in ARTS to reflect proper fees • Documents fee adjustments in ARTS			
1	**Basic Issuance- Pay Now:** • Discretionary edits (DE), warnings and hard stops • Corrections required to satisfy discretionary (DE), warnings and hard stops • When/how to submit DE for approval by supervisor or ACE Team • Read and understand returned DE comments • Verify with customer information from preview screen in ARTS, return to Driver's License Management (DLM) screen for corrections • Re-verify customer information in Driver's License Management (DLM) if corrections were made • Customer reads necessary statements before signature(s) • Review quality of signature(s) prior to saving • Enter fees exactly as received from customer • Cash – enter exact cash received/change given • Check – made out for correct fee to Treasurer State of Iowa. Check must be signed, and endorsed on back • Pin-Pad - Visa – Debit only, MasterCard, Discover with additional $1.50 convenience fee. Provide Pin-Pad receipt to customer • Interim document will print, verify quality of print. Provide interim document to customer verifying information			

Basic Issuance- Manual Sanctions

Trainer Name: _____   Training Location: _____

Skill - Level	Topic	Employee Initials	Trainer Initials	Date
1	• Successfully identify a reason for the vision/medical report • How to use the manual sanctions to print a vision/medical report • How to use the manual sanctions to print and serve a sanction and Temporary Drivers Permit (TDP) notice if required • Create, schedule, and notate a line drive in ARTS • Understand how to successfully enter the line drive in EMREMS			

Reading the Driving Record

Trainer Name: _____   Training Location: _____

Skill - Level	Topic	Employee Initials	Trainer Initials	Date
1	Employee understands how to: o Read the driving record o Read the compliance summary screen o Print and provide compliance summary letter to customers o Review compliance summary letter with customer and explain next steps o Apply/process payment for civil penalties (Drivers→Compliance→Civil Penalty)			

Knowledge Testing

Trainer Name: _____   Training Location: _____

Skill - Level	Topic	Employee Initials	Trainer Initials	Date

1	Understand knowledge test eligibility requirements for license classes, endorsements, and restrictions
	• Available tests
	    o Non-commercial operator
	    o Motorcycle
	    o General Knowledge
	    o Air Brake
	    o Combination
	    o Tank
	    o Hazmat
	    o Double Triple
	    o Passenger
	    o School Bus
	• Foreign language tests available
	• Oral Tests – Who, Why, When etc.
	• CTS Language Link (interpreter calls and video chat) as needed
	• CDL Testing: Verify ELDT prior to sending HAZMAT			

1	Access and navigate AutoTest • Set up a test • Access customer history • Printing, scoring, and entering (ARTS/CSTIMS) paper tests when AutoTest isn't working			
1	Understand how to properly administer a knowledge test: • Verify correct test(s) are sent to testing computers from ARTS • Photo is required prior to knowledge testing • Monitor testing area, assisting customers when requested			
1	Providing results to customers: • Explain validity of test results to customer • Locate and understand the customer's knowledge test history in ARTS • Print test receipt, if needed • Upon request, able to review/explain test questions with customers			
1	Employee completes the operator and motorcycle knowledge tests for awareness of customer experience (Preferably CDL for Commercial Examiners)			

Drive Exams for Issuance

Trainer Name: _____   Training Location: _____

Skill - Level	Topic	Employee Initials	Trainer Initials	Date
1	• Drive exam eligibility requirements for license classes, endorsements, and restrictions • Photo required prior to skills testing • CDL: Verify ELDT requirements in CSTIMS • Sending a drive test to the drive test tablet • Operating Drive Test tablet • Locate, complete, and print required score sheets • Satisfy skills test requirement through Driver's Education • Enter skills tests results in ARTS/CSTIMS • Locate and understand customer skills test history in ARTS			

1	• Understand reasons for requiring a drive exam prior to issuance:
	   o Driver education request
	   o First license over 18
	   o Chauffeur D-3
	   o Commercial Driver's License
	   o Lifts over one year
	   o Expired withdrawn over one year (365 days)
	   o On the road motorcycle tests (Motorcycle only licenses)			

1	• Understanding how Drive Exams are scheduled (scheduling and/or appointments)
	   o Non-Commercial Drive Exams
	   o Motorcycle on the road drive exams (motorcycle only license)
	   o Commercial Drive Exams
	   o CSTIMS navigation and scheduling.
	• Rescheduling, if failed or missed			

1	Complete the online DL Issuance Basics Assessment. Passing score is 80% or higher.			

Pulling for Line Exams

Trainer Name: _____   Training Location: _____

Skill - Level	Topic	Employee Initials	Trainer Initials	Date

1	When issuing, the customer may appear to have a condition prohibiting them from safely operating a vehicle. Issuance staff can "pull" a customer for a line exam.
	
	   o Proper inquiries/review with customer on ability
	   o Recognizing the customer needs to be pulled for a line exam/drive test
	   o Scheduling for drive test			

Extension/TDP – Temporary Driving Permit

Trainer Name: _____   Training Location: _____

Skill - Level	Topic	Employee Initials	Trainer Initials	Date

1	How to issue a TDP for the reason listed below:
	   • Pending sanction
	   • Pending OOS hazmat approval			

1	When to recognize military waiver extension applies and when to contact ACE Team for military extension support			

PWD (Persons with Disability) Applications

Trainer Name: _____   Training Location: _____

Skill - Level	Topic	Employee Initials	Trainer Initials	Date
1	• Types of permits and their requirements and time limits			
1	• Identify proper requirements for issuing PWD • Doctor's letter requirements (Who can sign: DO, MD, Chiropractor, Ophthalmologist, VA letter)			
1	• Accessing PWD Screen in ARTS • Verifying permit numbers/issuance of permits/signing permits • What we fill out on the application screen			
1	• Verify device number prior to issuing			
1	• Obtaining customer signature on parking permit			

Medical/Vision Reports

Trainer Name: _____   Training Location: _____

Skill - Level	Topic	Employee Initials	Trainer Initials	Date
2	Recognize reasons why Medical and Vision Reports are issued • Incoming customer requests • Requests from medical care provider (recall) • Departmental re-exam – when conditions require • Clerks' observations or information provided by customer • Visual screenings			
2	Locating/generating Medical and Vision reports in ARTS			
2	Distributing a medical/vision report • Information needed on report prior to providing to customer • Explanation to customer • Documentation of referral in ARTS			
2	Returned vision and medical reports • Reviewing reports to identify what to look for/required areas to be filled out			
2	• When to require a drive exam			
2	Processing completed Medical/Vision reports • Adding Medical and Vision Report in Arts • File or forward and referral reason • Index and scan			
2	Suspension - Reason for suspending from Medical/Vision Report			
2	Medical Reports • When to request a medical report • Review of completed medical report – exam date • Importance of file, forward, referral to Medical Advisory Board (MAB) and why • When to issue, with or without restrictions or sanction • MAB process/timeframe			
2	Vision Reports • When to issue vision report • When to issue, with or without restrictions or sanction • Reviewing of completed vision report – exam date • Importance of file, forward and why			

Processing Medical and Vision Recalls/EMREMS

Trainer Name: _____   Training Location: _____

Skill - Level	Topic	Employee Initials	Trainer Initials	Date
2	Understand and define Recalls. Identify proper restrictions/Medical/Vision etc.			
2	Scheduling/preparation of Recall letters			
2	Scheduling and rescheduling recalls			
2	Suspensions: o Failure to appear o Unsatisfactory Medical or Vision o Failure of drive test			
2	Document future Recalls in Recall database in W drive			
2	Concluding Recalls			

Department Re-exam

Trainer Name: _____   Training Location: _____

Skill - Level	Topic	Employee Initials	Trainer Initials	Date

2	This training is currently happening in person (ACE team is supporting the counties on training if the counties don't have their own trainers).
	    o Identify reason for Department Re-Exam
	    o Use checklist for re-exams			

Driver Examiner Training
Skill-Level 2

Team members should complete issuance training prior to participating in the Driver Examiner Certification programs.

If skills testing is conducted at the county location, and the trainee will be a skills examiner, certification programs must be completed in the following order:

1. Certified Driver Examiner Program (CDE)

2. Certified Motorcycle Examiner (CME), if applicable

3. Certified Commercial Examiner (CCE), if applicable

Please specify which certification programs will apply to the trainee:

_____ Non-Commercial (CDE)

_____ Motorcycles (CME)

_____ Commercial (CCE)

Driver Examiner Training Checklists:
Certified Driver Examiner
Certified Motorcycle Examiner
Certified Commercial Examiner

Training Checklist Completion

I have been trained on the tasks outlined in this checklist and I feel capable of successfully completing these tasks.

Employee Signature: _____   Date: _____

County Treasurer Signature: _____   Date: _____

Please email all completed checklists to mvd.learninganddevelopment@iowadot.us.