

City of Toronto

Economic Development Culture and Tourism Department



Customer Service Representative Manual

Revised: March 4, 2004

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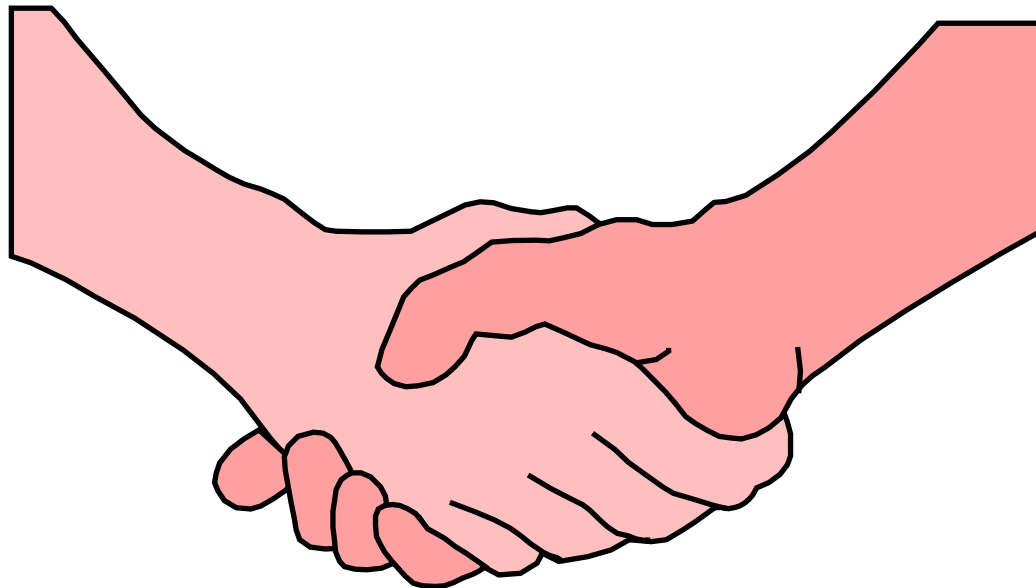
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CUSTOMER SERVICE

Call Centre Script

1. Good morning (afternoon), City of Toronto, registration.
2. May I have your home phone number please?
* If client's phone number is not listed always search by clients Last Name.
3. Do you have your Visa or MasterCard ready?
4. May I have the course barcode?
5. Who would you like to register?
6. Would you like to register anyone else?
7. Your confirmation number is.....

Logging in to the phone

1. Logging into 338-4FUN or TTR zero out.
 - Press "Make Busy" key so it is solid.
 - Press your "Green " key (located in the bottom right hand corner). You will hear a dial tone.
 - Enter your personal access code. Each operator should be assigned their own 4-digit code.
 - You will then be prompted to enter a general access code.
 - Your "Not Ready" key should now appear solid. Once you press this key, all indicators will disappear; you are now logged in.
2. Logging off 338-4FUN or TTR zero out.
 - During a call, press "Make Busy" key once, so that it is solid.
 - Once you call has ended, press the Make busy key so that it is flashing.

Note: the Make Busy key should never be left solid, it should be used whenever you leave your desk.
3. Forwarding a call.

The call forward function allows you to forward your personal calls to another phone.

 - Press "Call Fwd" then enter the number you wish your calls to be forwarded to.
 - Press "Call Fwd" again, your "Call Fwd" button will now be solid.
 - To release the call forward function just press the "Call Fwd" key.

CSR Not Ready & Make Busy Phone Expectations

Scenarios	Not Ready	Make Busy
Asking Registration Officer a question while in Queue		✓ If you have to leave your workstation
Asking Registraton Officer a question – Client is NOT on the line & completing Notes/work related to the call	✓	
Assigned Work by Supervisor or Registration Officer		✓
Processing an in-person registration		✓
Bathroom Break - while in Not Ready		✓
Bathroom Break - in queue		✓
Morning and afternoon breaks		✓
Lunch		✓
Call Back – <u>Customer Service Representative</u> unable to complete application at initial contact i.e.) complex situation that requires assistance to complete or corrections to an account		✓ This includes Notes/any After Call work related to the call
Manual applications data input (Program Maintenance work to correct course errors)		✓
Team Meetings		✓

Not Ready - should be used for finalizing the work required on an ACD call i.e.) after completing the data capture on a new call, completing Notes and / or any other wrap-up work required for that particular call.

Make Busy / Logout - should be used for any absence or pause from taking ACD calls.

NOTE: This list is not exhaustive. Please consult with a Registration Officer if there are any questions.

Telephone Skills



At no time should you be eating while on the phone.



Greet the customer as if you were meeting face to face. Extend the same polite, courteous invitation and willingness to help.



The speed at which you talk on the telephone is very important. Speaking too fast can be intimidating and speaking too slow gives the impression that you are bored.



If you are stuck or need to ask a question please be sure to use the mute button. Do not carry on a conversation with someone else in the room and have the customer listening.



Write down and explain your commitment and be sure to follow through on time.



When transferring a call or putting someone on hold, be sure to explain what you are doing and what to expect. When putting someone on hold for a long period of time be sure to check back on them frequently.



Prior to handing off the call to another internal person make sure you have the correct name and contact number in case you lose the call or need to follow up.



Be sure the customer has no further concerns before ending the conversation.

Listen responsively to the other person. Encourage them to say what they need to say. Do not cut them off.

Dealing with Challenging Customers

Empathise by acknowledging how they are feeling. Do not judge. It is OK for them to feel that way.....if you were in their shoes you probably would too.

Clarify all aspects of the issue. Use questioning and listening skills to ensure that you fully understand their concern. Show them you understand by rephrasing the issue.

Propose a solution to the issue and get their agreement to it.

Act. You both make a commitment to action. Follow up....this will ensure complete satisfaction

How to use our Language Line Services

The City of Toronto offers our non-English speaking clients the service of an Interpreter.

When receiving a call:

1. Use the Conference Hold button to place the non-English speaker on hold.
2. Dial 1-800-874-9426 (in the case of an emergency, dial 1-800-523-1786).
3. Give information
 - Language needed
 - Client I.D. number (1000552035)
 - Organization name (City of Toronto Economical Development, Culture & Tourism)
 - Personal code (the 7 digits of your work phone number)
4. Add non-English speaker to the line by pressing the Conference button again.
5. Wait for the Answer Point to conference in the Interpreter.
6. Brief the Interpreter. Summarize what you wish to accomplish and give any special instructions.
7. Say "end of call" to the Interpreter when the call is completed.

When placing a call to a non-English speaker, begin at Step 2.



PARKS AND RECREATION POLICIES

Residency Requirements

Residents are people who live in Toronto, or own or operate a business in the City of Toronto. Priority for programs will be given to residents of the City of Toronto.

Non Residents

Non-residents do not reside in, own property in, or own /operate a business in Toronto (as defined by the 'M' series postal code). Non-resident registration begins 10 days after the initial registration date for all programs. For fee programs non-residents must pay a \$35.00 non-residents fee in addition to the program fees. For non-fee subscriber and drop-in programs non-residents will be charged \$35/person per program. For pay-as-you-go drop-in fees, no non-resident fee is applied. Non-residents taking programs at priority centres will be charged a minimum of \$60 (\$35 non-resident fee plus \$25 introductory instructional program fee.)

Discounts

Older Adults- Any older adult who registers for an adult Parks and Recreation program will be charged 50% of the full adult rate excluding contracted, partnership or third-party programs and drop-in programs. For programs specifically designed for Older Adults, the full fee is charged.

Staff Re-Certification Discounts – staff members need to meet certain criteria before they are given the discount, which then needs to be approved by a Supervisor. Operators will not be accepting registrations by phone. Only full-time Recreation Staff with authority for such staff members will apply this discount.

Prorating Program Fees

Program fees are prorated based on the number of classes remaining. For evaluated or instructional programs, e.g. swimming, prorated registrations will be allowed up to the third class.

Non Attendance in Free Programs

Free programs offered by the City, at designated Priority Centres are in high demand - and often have waiting lists. To ensure that valuable spaces in programs are used, participants who sign up for free programs and do not attend the first two classes, may be contacted by Recreation staff. Depending on the reason for the absences, non-attendants may be asked to leave the program to make room for someone from the waiting list.

Transfers

There is no fee to move from one program to another or one class to another. Transfers are not permitted for certification or progression programs after the first two weeks, or as determined by the Parks and Recreation staff.

Program Override

There are to be absolutely no age overrides or overbooking of classes. Registrants must reach the specific age of the program by the first day of class.

The Welcome Policy

Everyone is welcome to participate in Toronto's recreation programs- regardless of ability to pay. Under the "Welcome Policy", if the client cannot afford to pay program fees they may be eligible to register for free. Proof of need, such as a benefit receipts, pay stubs, letter from an agency or church, social agency reference letter, pension or employment insurance stubs, will be required. For more information, the Welcome Policy leaflet is available at all local community centres. To apply for consideration under the Welcome Policy, the client must speak to a full-time staff member at their local community centre, or call or write their District Operation Support Officer. The Operations Support Officers are responsible for monitoring and analyzing the Welcome Policy usage.

UPDATE

ON CHANGES TO THE WELCOME POLICY!

(...that were previously announced in December, 2003)

In order to provide our clients and support agencies with additional time to adjust to the elimination of the "Pending" option, the complete removal of "Pending" has been rescheduled to Saturday, September 4, 2004

In the meantime, please continue to advise clients of the following:

- As a customer service, Welcome Policy "*Pending*" Memberships will still be **available** until **Friday, September 3, 2004**.
- Up until the deadline of Friday, September 3, clients being given a Welcome Policy "*Pending*" Membership and registering for programs have **ONE WEEK** to follow-up with **ALL** documents required for the Welcome Policy application process.

- Clients who are subsequently denied the Welcome Policy, yet may have registered earlier for a program under it, have the choice of withdrawing from the program or paying the appropriate fee.
- Clients are encouraged to have all documentation with them when **applying** for **OR renewing** the Welcome Policy.
- The **Friday, September 3, 2004** deadline will affect **Fall 2004/Winter 2005** registration as on Saturday, September 4, 2004, only clients with **pre-approved** Welcome Policy Membership will be able to utilize the Welcome Policy adjustment and have program fees waived.
- In preparation for this change, clients are encouraged to apply for the Welcome Policy, with all required documentation, **2-3 months in advance** of **registration** OR the **expiry date** of their current Welcome Policy membership.
- Welcome Policy Membership is valid for **one full year** from date of approval. Once approved for the Welcome Policy, the client needs to **reapply** on a **yearly** basis.
- For further information, please contact recreation staff at their local Community Centre or Civic Centre.

WELCOME POLICY PROGRAM ELIGIBILITY

Approved Welcome Policy applicants are eligible for the following programs/passes/memberships during the course of the year.

	Winter	Spring	Summer	Fall
Pre-schoolers (0 – 5 years) and Children (6 – 19 years)	<ul style="list-style-type: none"> ➤ 1 Aquatic Program (If not used, no substitutions), <u>plus</u> ➤ 1 Non-aquatic Program Eg., skating, music, sports, tennis (If not used, no substitutions), <u>plus</u> ➤ 1 Camp Session Eg., January Holiday Camp or March Break Camp. (If not used, no substitutions) 	<ul style="list-style-type: none"> ➤ 1 Aquatic Program (If not used, no substitutions), <u>plus</u> ➤ 1 Non-aquatic Program Eg., skating, music, sports, tennis (If not used, no substitutions), <u>plus</u> ➤ 1 Camp Session Eg., A Camp “if” one is offered. (If not used, no substitutions) 	<ul style="list-style-type: none"> ➤ 1 Aquatic Program (If not used, no substitutions), <u>plus</u> ➤ 1 Non-aquatic Program Eg., skating, music, sports, tennis. May be substituted for a maximum of 2 weeks of camp, <u>plus</u> ➤ 1 Camp Session. Either 2 one-week camp programs, or 1 two-week camp program. (If not used, no substitutions) 	<ul style="list-style-type: none"> ➤ 1 Aquatic Program (If not used, no substitutions), <u>plus</u> ➤ 1 Non-aquatic Program Eg., skating, music, sports, tennis (If not used, no substitutions), <u>plus</u> ➤ 1 Camp Session Eg., Holiday Camp in December. (If not used, no substitutions)
Youth (13 – 24 years)	<ul style="list-style-type: none"> ➤ 1 Aquatic Program, or 3-month aquatic pass, or 10-visit punch card, or 1-year aquatic pass*. (If not used, no substitutions), <u>plus</u> ➤ 1 Non-aquatic program, or 3 month pass (eg. Fitness), or 10-visit punch card, or 1-year membership*. (If not used, no substitutions), <u>plus</u> ➤ 1 Camp Session Eg. January Holiday Camp or March Break Camp. (If not used, no substitutions) 	<ul style="list-style-type: none"> ➤ 1 Aquatic Program, or 3-month aquatic pass, or 10-visit punch card, or 1-year aquatic pass*. (If not used, no substitutions), <u>plus</u> ➤ 1 Non-aquatic program, or 3 month pass (eg. Fitness), or 10-visit punch card, or 1-year membership*. (If not used, no substitutions), <u>plus</u> ➤ 1 Camp Session Eg. A Camp “if” one is offered. (If not used, no substitutions) 	<ul style="list-style-type: none"> ➤ 1 Aquatic Program, or 3-month aquatic pass, or 10-visit punch card, or 1-year aquatic pass*. (If not used, no substitutions), <u>plus</u> ➤ 1 Non-aquatic program, or 3 month pass (eg. Fitness), or 10-visit punch card, or 1-year membership*. May be substituted for a maximum of 2 weeks of camp, <u>plus</u> ➤ 1 Camp Session Either 2 one-week camp programs, or 1 two-week camp program. (If not used, no substitutions) 	<ul style="list-style-type: none"> ➤ 1 Aquatic Program, or 3-month aquatic pass, or 10-visit punch card, or 1-year aquatic pass*. (If not used, no substitutions), <u>plus</u> ➤ 1 Non-aquatic program, or 3 month pass (eg. Fitness), or 10-visit punch card, or 1-year membership*. (If not used, no substitutions), <u>plus</u> ➤ 1 Camp Session Eg. Holiday Camp in December. (If not used, no substitutions)
Adults (25 – 59 years.) and Older Adults (60 years plus)	<ul style="list-style-type: none"> ➤ 1 Program or 3-month pass (eg., aquatic, fitness, etc.), or 10-visit punch card, or 1-year pass/membership*. 	<ul style="list-style-type: none"> ➤ 1 Program or 3-month pass (eg., aquatic, fitness, etc.), or 10-visit punch card, or 1-year pass/membership*. 	<ul style="list-style-type: none"> ➤ 1 Program or 3-month pass (eg., aquatic, fitness, etc.), or 10-visit punch card, or 1-year pass/membership*. 	<ul style="list-style-type: none"> ➤ 1 Program or 3-month pass (eg., aquatic, fitness, etc.), or 10-visit punch card, or 1-year pass/membership*.

* Note: Taking the 1-year pass/membership means using all 4 seasons of the Welcome Policy program eligibility

- “Extended Hours” for Camp programs are also included for Welcome Policy recipients.
- The Welcome Policy is continually under review and may be altered at any time.
- Aquatic programs listed in the **Aquatic Leadership Programs brochure** are **NOT** covered by the Welcome Policy.

Aquatic Leadership

Registration for Aquatic Leadership programs is ongoing. There is no set registration date such as the case for all other Parks and Recreation programs. All manuals required for the course are included in the course fee. Candidates are required to pay the full price of the course regardless if they already have the required manuals. Once they show the course instructor that they do have the correct manuals, the course instructor will then direct the Lifesaving Society (416-490-8844) to send a refund cheque.

Transfers: transfers from one class to another will be permitted, if space is available. The request must be made to the registration office a minimum of 10 days prior to commencement of the program

Withdrawals and Refunds: if the client choose to withdraw from a program, more than 10 days notice is required to be eligible for full credit or refund (less a \$10 processing fee). If the client withdraws from a program 10 days or less from the course start date, a 50% refund is provided. No refunds are given for classes or programs that are missed.

Withdrawal from a program

All cancellations / withdrawals must be requested in writing, **prior to the start of the programs third class/day only**. No refunds or credits will be considered after this period.

Withdrawals will be pro-rated and a \$10 administration fee will be deducted for all refunds per person, per program. Refunds requests must be submitted in writing and dated.

The \$10 administration fee will NOT BE DEDUCTED if you accept a credit on your City of Toronto account.

Deliver your request in person to the Customer Service Section at your local civic centre, fax it to (416) 392-1551, or mail it to:

Customer Service Section, Registration and Permits
Toronto City Hall, 100 Queen Street West, 1st floor
Toronto, Ontario, M5H 2N2

Call (416) 338-4FUN (4386) for more information.

Adapted and Integrated Services

The City of Toronto believes that having people with different abilities/disabilities participating together in recreation programs enhances the quality of life for everyone.

If you discover that a client has special needs and requires one-to-one assistance or who is new to Parks and Recreation programs please have them call their district contact listed below before they register.

DISTRICT	STAFF CONTACT	PHONE NUMBER
EAST	Elaine Koitsopoulos	396-7760
NORTH	Melissa Clare	395-6183
SOUTH	Jim O'Gorman Steve Pett	392-7265 x315 392-1783
WEST	Sarah Bumstead	394-8746

Program Cancellation

Participants will receive a full refund or credit, if Parks and Recreation staff cancels the program they are registered for. If a refund is requested it will be processed however the client paid originally. No written request is necessary.

Receipts and Confirmations

Confirmations will be mailed approximately two weeks after registration. To confirm registrations clients may also use the Touch-Tone Registration line once the initial registration period has passed.

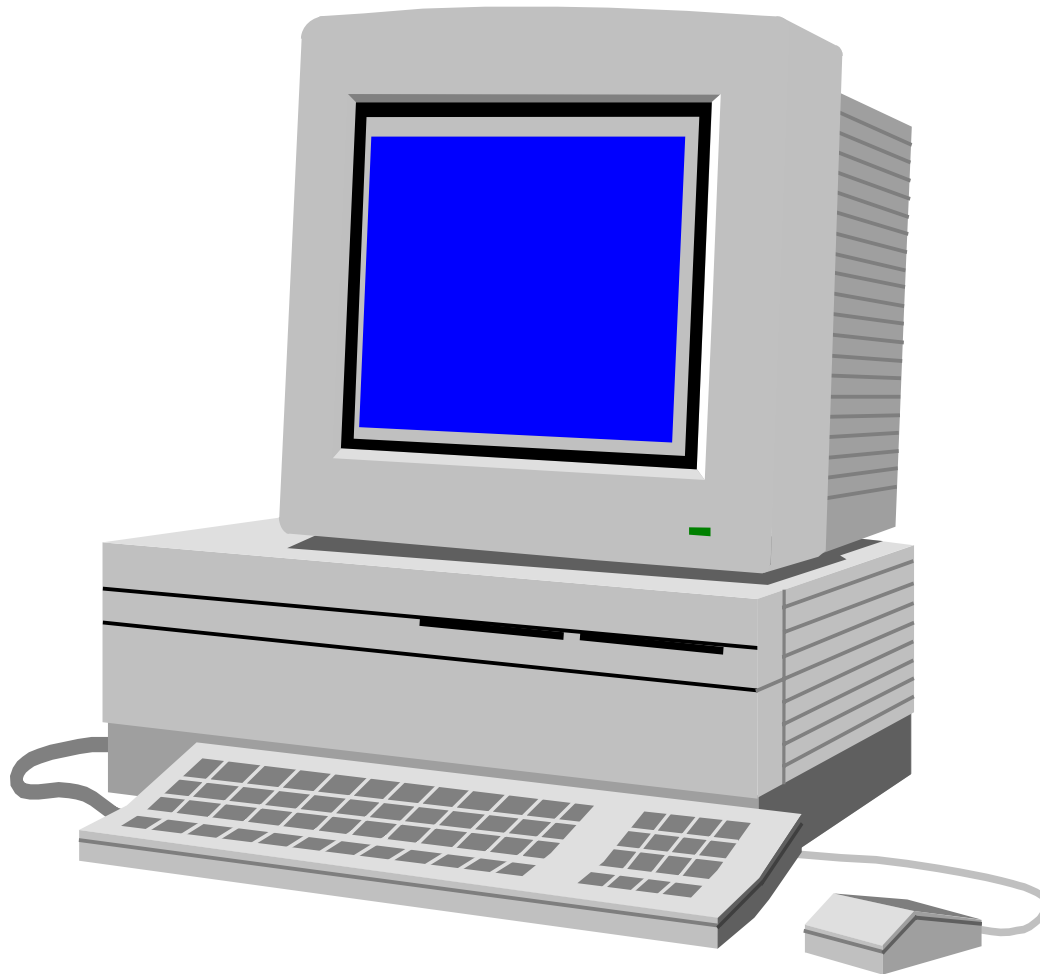
Waitlists

There is no limitation to the number of programs you are waitlisted for.

Partial Payment Policy

When a client registers for a program that is over \$100.00 they will have the option to schedule their payment with a Customer Service Representative only. They must pay 50% of the course fee at the point of registration and the remainder is due 5 weeks before the last day of the program.

NOTES



CLASS PROGRAM REGISTRATION

Login Procedures

Novell Screen

Citrix Users

CLASS for Windows 4.0 Login

Before you Begin

To set you session to default

- Click on the word **Tools** at the top of your screen.
- Select **Options** from the drop down list
- **Double Click** in the white area beside Session-Registration
Select the appropriate session
- Click **OK**
- Select **close** at the Program Registration screen.
- At the Open Form, select **Program Registration**
- Click on **Open**

Importance of Security

When leaving your computer station unattended always be sure to lock the screen. **Click** on the key symbol at the top left corner of your screen.

Registering yourself or family members

Please do not process any registrations for yourself, family or friends. Have another staff member process the registration and the payment.

Using Proper Case

Please be sure to use proper case in all CLASS applications.

Common Mistakes

- Creating a duplicate account
- Not verifying account information
- Not confirming registration (who, where, time)
- Opening an account without complete information (ie. No postal code or apartment number)
- Incorrect spelling of names, streets etc.
- Registering client under an organization account.
- Not verifying Welcome Policy Membership

COMMON PROBLEMS

1. More than one account for one family.
2. People registering other people under their account.
3. Not entering birthdates.
4. Not selecting the appropriate extra fee.
5. Withdrawal errors when pro-rating.

ACCOUNTS

How to retrieve a Family Account

1. Place cursor in **Client** field.
2. Enter client's home phone number OR last name and first initial OR client barcode
3. The Family Account may come up automatically, if not select appropriate account by verifying address etc.

NOTE: In the case where multiple accounts come up for *one* family, please write down family name and Phone Number so that a Registration Officer can merge accounts into one.

How to create a NEW Family Account

1. Before creating a new account, be sure that you have done a complete search using both phone number and last name.
2. When the client cannot be found you will be asked if you want to create a new account. Be sure to select **Family** account. Do Not select Organization!
3. Enter all information into appropriate fields. Be sure to use proper case. **Always** include a phone number. Don't forget to ask about medical problems.

Changing existing account information

1. Retrieve the client's account.
2. Click the word **Account** at the top of your screen. (Menu Bar)
3. Select **Maintain Family** from the drop down list.
4. Make necessary corrections. Click **Close**.
5. Click **Yes** to save the information.

How to view account transactions

1. Retrieve the clients account.
2. Click on the word **Account** at the top of the screen.
3. Select **View Accounting Transactions** from the drop down list.

NOTE: Please use discretion when reviewing transactions with customer.

Account Alert Text

This text is to be used in two ways. One way is to communicate, to all other registration staff across the City, any pertinent information regarding the clients account. Always start the text with today's date and end it with your full name. Don't forget to delete the text after you have taken the appropriate action. The other use for this text is for indicating an emergency name and phone number.

Example: Feb 23, 2001 – Left message re: spot available from waitlist for Cathy Smith in course 300987. Lisa Mcguire

Client medical text

Medical text **must** be used to indicate any health information about the client to the instructor. This information will be printed on a classlist.

Example: Allergic to peanuts
Emergency Contact: Anne Smith 905-555-5555

To apply medical text for a specific client:

1. Select **maintain family**.
2. Select client's **more information** field.
3. At the bottom of screen where it says alert or special text enter client's medical text.

How to apply account alert text

1. Retrieve client's account.
2. Click on the word **Account** at the top of your screen.
3. Select **Maintain Family** from the drop down list.
4. The alert text field is located on the right side of the screen, near the top.
5. When entering alert text always begin with today's date and end with your full name.

CLIENT

Retrieving a client

1. Retrieve client's account.
2. In the Client Field use the drop down arrow to select family members.

Adding a client to an existing account

1. Retrieve necessary account
2. Click **Account** at the top of the screen.
3. Select **Maintain Family** from drop down list.
4. At the bottom of the screen add new family member in first empty field. Be sure to get their birth date.

Deleting client from account

1. Follow steps outlined above.
2. At the bottom of the screen locate client that needs to be deleted.
3. Click on the box to the left of their last name.
5. The line selected will now be highlighted. Press the delete key on your keyboard.

Note: A client can only be deleted from an account if no prior registration activity has occurred.

How to apply client medical information

1. Follow steps outlined above.
2. Locate client at bottom of screen.
3. Select **More Information** for required client.
4. Individual client card will come up enter all necessary medical information.

How to view a client's registrations and waitlists

1. In the registration screen select **Client** at the top of the screen. (Menu Bar) Note: you must have the client's account on your screen.
2. Select **View Registrations**. For more information on each registration click **View**.
3. For waitlists select **Maintain Waitlist**.

COURSES

To search for a course

1. Enter the course barcode.
2. If you do not have the course barcode, click on the **course** button (middle of screen)
3. Select from the activity list or the complex list and select **search**. (Be sure you have selected the appropriate session)
4. Double click on the course line or highlight line and click **select**.

To search for multiple activities

1. In the 'search for a course' screen, highlight first activity.
2. To select more than one activity **press Ctrl** and click on the other activities required.
3. Click **search**. All courses for each activity will now come up.

To select multiple courses whether it is for registration or for placing a client on multiple waitlists use the same method. Just hold down the Ctrl key as you select individual courses.

How to view a course Classlist

1. Retrieve the course.
2. Click on the word **Course** in the top left corner of your screen.
3. Choose **View Classlist** from the drop down menu.

How to view a course waitlist

1. Retrieve the course.
2. Click on the word **Course** in the top left corner of your screen.
3. Choose **Maintain Waitlist** from the dropdown menu.

How to view course information

1. Retrieve the course.
2. Click on the word **Course** in the top left corner of your screen.
3. Choose **View Course** from the dropdown menu.

FEES AND ADJUSTMENTS

How to charge extra fees

Extra charges for a course could be art supplies, costume, consumables etc.

1. Select the '**Extra Fee**' tab in the middle of the screen.
2. Put a **check** in the appropriate box. The box will appear green with the check in the box and red without a check.
3. Select **register**.

How to apply an Adjustment or a Discount to a Registration

Adjustments include the **Welcome Policy and Senior's 50% discount**. Please be careful when doing adjustments. Some will require approval from a supervisor.

1. Retrieve client.
2. Retrieve course.
3. Click on the adjustment tab (right beside Extra Fees).
4. Click on the dropdown arrow. Select the appropriate Adjustment tab.
5. Click back to the course tab to verify correct fees.
6. Select register.

How to Apply a Pending Welcome Policy Pass

1. Verify that the client has not already used their welcome policy allocation for the session or whether they have an existing pending pass.
 1. Register client first using Welcome Policy adjustment.
 2. Click on the Passes tab.
 3. Select the specific District pending pass.
 4. Register client.
 5. Confirm registration by selecting OK.

REGISTERING

To Register

1. Retrieve client.
2. Retrieve course.
3. Click the **Register** button.

(Note: be sure to verify course information with client, including the number of spots available in the course, before registering.)

Registering for Multiple Courses

1. Retrieve client.
2. Click the **Course** button.
3. Highlight the first course requested. Holding down the **Ctrl** key, highlight additional courses and click the **Multiple** button.
4. Highlight the course fee if more than one option appears.
5. Click the **Extra Fees** tab to select any extra fees required.
6. Click the **Multiple** button.
7. Click the **Register** button.

Transferring a Client from One Course to Another

1. Retrieve client. Bring up the course you are withdrawing from. (Note: if you have the correct information on your screen, the withdraw button will be bolded.)
2. Click on the **Withdraw** button. (Note: the prorate box should **not** be checked.)
3. Select the reason for withdrawal from the dropdown list – **Transfer**.
4. Click **OK**. (Note: the client should now have a credit on their account that equals the amount paid at the time of registration. When asked if the client is requesting a refund, the answer is always **no**.)
5. Register the client in the course they want to be transferred to. If required, take a payment for the outstanding balance.

To Waitlist

1. Retrieve client.
2. Search for the course.
3. Click the **Waitlist** button.
4. Click **OK**.

To Amend a Registration

In the event a registration is processed and an adjustment must still be applied to the account, please follow these steps:

1. Retrieve client.
2. Retrieve course.
3. Click on the word **Registration** from the top of your screen.
4. Click on **Amendment**.
5. Click on the **Adjustments** tab.
6. Select the correct adjustment.
6. Click the **Courses** tab to verify the adjustment.
7. Click on the **Amend** button
8. Type in your amendment reason when prompted.

To Waitlist for Multiple Courses

1. Retrieve client.
2. Do a multiple search by holding the **Ctrl** key and clicking on each of the courses to be waitlisted.
3. Click **Multiple**.
4. Click **Waitlist**.
5. Click **All**.

Scheduling Payments

The scheduling of payments will only occur if a single program fee is more than \$100.00. A box will appear in your registration screen asking if you would like to schedule payments. Just enter the amount of the initial payment (50% at least) and be sure to enter the appropriate date for the remaining payments. Please keep in mind scheduled payments over the phone must be made by VISA or MASTERCARD. Scheduled payments by Cheque must be made **in person**, and **post dated** at the time of registration.

Bus Routes

When a bus route is available a separate box will automatically come up in the registration screen. You will be required to enter the pick up location as well as the drop off location.

Memberships / Passports / Punchcards

Memberships, passports and punchcards are not currently processed over the phone. Please direct them to their local community centre or civic centre.

Passports only are distributed centrally in the East District please direct inquiries to 338-EAST.

To Withdraw a Client from a Course

1. Retrieve client.
2. Click **Client** at the top of your screen.
3. Click on **View Registrations**.
4. Highlight the course the client wishes to withdraw from and click the **Select** button.
5. To charge a withdrawal fee, click the **Withdrawal fees** tab. Select the appropriate withdraw fee.
6. Return to the **Courses** tab to confirm the withdrawal fee has been applied to the account.
9. Click the **Withdraw** button.
8. When prompted, select the withdraw reason and click on **OK**. Try not to select the reason "Other".
10. At the **Request Refund** prompt click "No" if the client would like the credit left on their account. If they would like the money refunded they must send in a written request.

How to Verify a Welcome Policy Membership

1. Enter clients' phone number in client box.
2. Select **Client** from the tool bar, and then select **View Memberships**. If the client has been registered with a Welcome Policy Membership, it will show here.

PAYMENTS

To Apply a Credit to an Account or To Take a Payment

1. Retrieve client.
2. Click the **Payment** button.
3. Select the payment type from the dropdown list. (Visa (batch), Master Card (batch), cash or cheque.)

Please keep each cash payment in its own separate envelope with the clients phone number and barcode number on the envelope. For cheques please write clients phone number and barcode on the back of the cheque. This will help you balance at the end of your shift.

4. In the amount field, type the dollar and cent amount. (Note: if you are taking a payment for a registration, you will not have to enter the amount, it will be done for you.)
5. Verify that the payment information is correct.
6. Click **OK**. (Note: the account will show a credit for the amount paid.)

If a client account appears with an outstanding balance, the entire balance must be paid to confirm the registration.

If a client account appears with a credit balance, the program fee will automatically be deducted from the credit. You are not required to take a payment.

To Cancel a Payment

Note: you can only cancel a payment on the same day the payment is made.

1. Retrieve client.
2. Click on the word **Payment** at the top of your screen.
3. In the dropdown list select **Cancel Payment**.
4. If there was more than one payment made that day, select the correct payment by clicking on it.
5. Type the reason for the cancellation in the reason field.
6. Click **Cancel Pay**.
7. Click **Yes** when asked if you want to cancel the payment.

REPORTS

Hint: It is a good practice to preview a report before printing it, in the event that all the required data was not entered.

To Print a Class List

1. Choose **Report Printing** from the Class for Windows menu.
2. Click on the **Programs** tab.
3. Choose the **Class Lists** from the menu.
4. Click the **Open** button.
5. Enter the course barcode in the barcode field.
6. Click **Preview** or **Print**.

To Print an Attendance List

1. Choose **Report Printing** from the Class for Windows menu.
2. Click on the **Programs** tab.
3. Select **Course Attendance Sheets** from the menu.
4. Click the **Open** button.
5. Enter the course barcode in the barcode field.
6. Click **Preview** or **Print**.

To Print a Program Status Report

1. Choose **Report Printing** from the Class for Windows menu.
2. Click on the **Programs** tab.
3. Select the **Program Status Report** from the menu.
4. Click the **Open** button.
5. Choose the activity from the dropdown list. (If applicable).
6. Be sure you are searching in the right session.
7. Choose the supervisor (If applicable).
11. **Choose your facility.**
(Note: Do **NOT** have all selected under facility).
9. Click **Preview** or **Print**.

To Print a Daily Cash Balance Report

1. Choose **Report Printing** from the Class for Windows menu.
2. Click on the **Accounting** tab.
3. Select **Daily Cash Balance Report** from the menu.
4. Click the **Open** button.
5. Change the user to yourself (select from the dropdown list)
6. Click the **Summarized** or **Detailed** bullet.
7. Click **Preview** or **Print**.

What to do if you do not balance

Re –print your Daily Cash Balance Report but this time; change the bullet to detailed. Verify that the payment **type** and payment **amount** that appears on the Daily Cash Balance Report is correct for each transaction. Cross-reference it with the cheques or cash that you have in front of you. If you have entered the wrong payment type or wrong number, cancel the payment (see How to cancel a payment on page18) for the appropriate account and then re-enter the payment properly.

To Print Receipts from Report Printing

1. Choose **Report Printing** from the Class for Windows menu.
2. Click the **Receipts** tab.
3. Reprint Online Receipts will be highlighted. Click **Open**.
4. Click the **Account** button.
5. Enter the client's home phone number. (Ensure you are searching for a family account by selecting the **Family** bullet.)
6. Click the **Search** button.
7. Select the client you are printing receipts for.
8. Click **Select**.
9. Click **View List**.
10. In the print column, select the lines you want to print by clicking in the box.
11. Click the **Print** button.

To Print Receipts from Program Registration

1. After completing registration process for client, click on **Print** button at bottom of page.
2. Select desired report by double clicking in the **Print** box.
3. Click the **Print** button.

To Re-Print Receipts

1. From the Program Registration page, click the **Close** button.
2. Click the **Reports** tab.
3. Reprint Online Printouts will be highlighted. Click **Open**.
4. Follow instructions 4 – 11 on “**To Print Receipts**”.

APPENDICES

IMPORTANT PHONE NUMBERS

District General Info Numbers

North District	416-395-7922
South District	416-392-1111
East District	416-338-3278
West District	416-394-8510

Customer Service Supervisors

Central	Cathy Burns (<i>acting</i>)	416-392-3359
North	Diane Matto	416-395-0104
South	Mark Lawson	416-392-1902
East	Norm LeBrun	416-338-2559
West	Pat Profiti	416-338-2570

Registration Officers

Central	Agnes Lai	416-338-3318
North	Lucy Volpi	416-338-3341
South	Pam Ferrante (<i>acting</i>)	416-338-2576
East	Meredith Teng	416-338-0989
West	Jennifer Magnus	416-394-6024

Customer Service Representatives

Central	Carol Mendes	338-2681
North	Isabel Carroll	395-6075
	Elvie Biniola	395-6075
East	Anne Gouin	338-0987
	Paula Simms	338-1021
West	Olie Cancellier	338-2569
	Maria Carrier	338-2567
South	Brandi Lawson	338-2578

Operation Support Coordinators

Central District	Vacant	416-
North District	Kelvin Seow	416-395-6190
South District	Ken Jeffers	416-392-7019
East District	Wendy St. Cyr	416-396-5334
West District	Allan Graham	416-394-8524

CLASS System Administrators

Central District	Sven Matern	416-392-3356
North District	Kevin Meshcino	416-395-7888
South District	Brian Wilding	416-392-1935
East District	Keith Wilkinson	416-396-5332
West District	N/A	416-394-6024

TOUCH TONE REGISTRATION - STEPS

TTR is available from 7:00 a.m. to 12-midnight daily beginning with the first day of registration as indicated. There is a high demand for programs, especially on the first registration day, so you may get busy signals for a while or have to wait in a phone queue.

TTR Checklist:

- Client Number(s)
- Family Pin Number
- Program Codes for your first choices - and alternative selections in case the 1st choices are full
- Program locations, dates, times and fees required – if any (including extra fees)
- Visa or MasterCard number and expiry date
- Paper and pen to record confirmation numbers

DIAL 338-0000 To access the automated TTR line.

Press

- 1 To register for a course
- 2 To review registration information
- 3 To pay for courses or any balance on your account
- 4 To register for a waitlist
- 9 To listen to the main menu again
- 0 To speak to an operator

To register for a course:

1. Press
2. Enter Client Number slowly, then press
3. Enter Family Number, then press

The system will tell you if you have a balance owing on your account. If you have an account balance owing, you must pay off this account after you have registered for your programs, even if these programs have no fees or you will lose you registration.

4. Press **1** again, to register for a course.

5. Enter Program Code, then press **#**

The system will read back the course and location you have selected, and ask you to choose one of the following:

- 1 To register for the course
- 2 To select a different course
- 9 To return to the main menu
- 0 To speak to an operator

6. Press **1**. The system will say, “You have registered successfully.”

DON'T HANG UP.

You will then be asked to press:

- 1 To register for a new course (for the same client).
- 2 To register a new client (repeat steps from #2)
- 3 To make a payment (for the course you just registered for and any balance owing).
- 9 To return to the main menu
- 0 To speak to an operator

If you press **0 and you have an account balance owing, your registrations will not be recorded, even if you heard, “You have registered successfully.”**

*** (star key) to exit the system.**

If you press ***, wait and listen to the message. Press ***** again only if you have no balance owing and your course is free. If you have an unpaid balance owing and press *****, instead of **3** to make a payment, you will lose your registrations, even if you heard “You have registered successfully.”**

7. Press **3** to pay after you have registered all programs for all clients.
8. After you Press **3**, you will be asked to enter your Visa or MasterCard number, then press **#**.
9. You will then be asked to enter the Expiry Date, then press **#**.
10. You can now press ***** to exit the system, as you have successfully completed the registration process. If you wish to speak to an operator at this stage, press **0**. You will not lose your registrations at this stage, if you've made a payment.

General Tips

- Listen to the complete instructions before entering numbers.
- Enter numbers on your telephone keypad slowly and carefully.
- Always remember to enter **#** after entering numbers.
- Remember to make a payment, if required, before exiting the system or pressing "0" to speak to an operator.
- Always exit the system by entering ***** and listening to instructions.

Frequently asked Questions & Answers

1. What is my Client Number (Barcode #) and Family Number (PIN #)? How do I get my family account set up?
 - Could I have your home phone number please? Could I have your last name please?
 - If the registrant's name (or child's name) is not in the system, create a new family account
2. The system will not accept my Family PIN Number.
 - Check *Class* to verify that the Family Number and Client Numbers are correct.
 - Remind client that to use TTR (Touch Tone Registration), they must enter the Client Number first, then the Family PIN
3. When I enter the Course Code, the system tells me it's not valid.
 - Could I have the course barcode please? Check to see if the barcode was printed correctly
 - Is the class full? Do they meet all prerequisites, especially age? Check in Maintain Family to ensure that all the birthdates are correct.
 - For the purposes of registration for Parks and Recreation programs, a person's age is determined to be their age as of the start date for the course or program for which they wish to register. No exceptions will be made to this policy.
4. I tried to get on the waitlist using TTR, but was not successful.
 - Could I have the course barcode please? Check to see if they meet all prerequisites
5. Why won't the system let me register my child in the program they want?
 - Does the child meet all prerequisites, including age?
 - Is the child's birthdate entered correctly in *Class*?
6. How much was I charged on my credit card?
 - Ask for Client Number, phone number or name
 - In Program Registration, call up the Client and select View Accounting Transactions from the Account menu

About Touch Tone Registration

7. I was first in line at my community or civic centre. Why was my first choice of programs already full?
 - Touch Tone Registration has 192 lines; plus we have over 50 operators assisting in registrations - all starting simultaneously at 7:00 a.m. sharp
 - Being first in line is no guarantee you'll get the programs you want
8. I prefer in-person service. Why did the City decide to go to touch tone registration?
 - Line-ups are inconvenient for many people
 - Bad weather and inability to arrange short-term daycare are concerns
 - You can still do in-person registration by getting a number and waiting in line - then you can deal with a customer service representative
 - Telephone operator-assisted method also puts you in touch with a live person
9. I didn't know that TTR would be faster than lining up – why didn't you tell me?
 - Toronto FUN Guide clearly points out pros and cons of registration options - with TTR noted as the fastest method and the best chance of getting the choices you want
 - Flyers and posters were distributed and displayed at community centres

10. I tried to use TTR, but my call got cut off. Why?
 - There is a 30 minute time limit on TTR calls – based on the fact that call lengths in our pilot project in the fall averaged under 5 minutes
 - The time limit is set to ensure that people don't try to sign up for excessive numbers of programs and so that groups of families don't try to piggyback on the call of the first one who gets through

11. I don't have a credit card. Are you discriminating against me / low income / cash economy people?
 - City Council decided that Priority Centres - designated centres in high needs areas – would have no program fees for any programs, so credit cards are not required
 - You can pay with cash in-person, or by cheque by dropping off or mailing your form in advance of the first registration day for your district
 - You can set up credit on your account with Parks and Recreation in advance of registration day – as long as you have a large enough balance on account to cover all the programs for which you register – talk to your recreation staff about this option

12. I waited in line, but some people dropped off registration forms and left. Does their application get looked at ahead of mine?
 - No. By standing in line you have the opportunity to negotiate program options or alternatives with registration staff, if your first choices are full; those who left their forms behind take their chances on not getting in at all

13. I have a Family Number – why are you asking me my phone number?
 - *Class* registration software searches by phone number, name or individual client number
 - Your Family Number, which acts like the PIN for your bank or calling card, is not searchable, but having in tells us you are in our system – which helps us serve you faster

Access/Fee Policies

14. I heard about the Welcome Policy for those who can't afford to pay for programs. I have a limited income and can't afford to pay. How do I get free programs?
 - Talk to recreation staff, or look for the Welcome Policy leaflet, about how to apply for assistance under the welcome policy
 - The City offers free programs throughout the city (as outlined in Toronto FUN)
 - Bring client up on screen and then go to Client – View Memberships. Has the client already received a “Pending” or “Approved” Welcome Policy Membership? If not, go to the Membership tab and apply the appropriate membership type.
 - Procedure: apply the Welcome Policy adjustment and then register the client. Note: “Pending Welcome Policy Approval” in client alert text until proof of eligibility is provided and the Operations support Co-ordinator or a front line recreation staffer approves the Welcome Policy application
 - TTR procedure: registrants should pay fees with credit card, apply for Welcome Policy after they are registered, and are reimbursed if their Welcome Policy application is approved

15. I'm 60 years of age and qualify for seniors' discount. Why do I have to pay the full fee upfront if I use touch-tone?
 - Not all adult programs are set up to perform the older adult discount function automatically at this time.
 - In-person or telephone operator-assisted registration process can accommodate the 50% seniors' discount with manual fees override
 - We will provide a manual credit directly to your credit card, or to your Parks and Recreation account, with about one month processing time in between.

16. City Council said that certain community centres in high-need areas would offer all their programs for free? Where are they?
- Council has designated 24 community recreation centres throughout the city as 'Priority Centres'
 - All programs offered at these centres are listed as free throughout your Toronto FUN Guide
 - You can ask your recreation or community centre staff for more information on locations of Priority Centres in your area

Media/Security

17. The media are here and want to talk to me and people who are lined up to register. Help! What do I do?
- Front line registration or customer service staff:
 - Direct reporter to your supervisor, or the mgmt staff in charge of the registration centre
 - Supervisory or Management staff (or front line staff if mgmt unavailable):
 - Advise media that they can't take people's photos or videotape them inside the registration facility, or outside in line on city property, without permission
 - Inform the reporter that, as Registration staff, you are not authorized to speak with the media or to give permission for videotaping or photography – but you would be happy to assist them in finding the proper contacts
 - Call the media hotline immediately at 560-8726

Post Registration

18. I dropped off my form on registration day but I haven't heard anything yet. How and when do I find out if I got in?
- Receipts for programs will be mailed out two weeks after registration – well before classes begin.
 - If you know your Client and Family Numbers, you can check your registrations by calling 338-0000 and following the voice prompts
 - If you don't know your Client and Family Numbers, find out what they are by calling your district customer service representatives at the number listed in your FUN Guide
 - Phonelines are busy, especially in the mornings, during initial registration periods, call in the evenings when the volume of calls is lower to check on your registrations
19. I registered by TTR and got confirmation numbers for my programs, but when I called 338-0000 to confirm that the registrations went through OR went to the first class, I found out my registration didn't get processed. Why?
- You may have hung up on your call without completing the payment portion of the process, which means your registrations did not go through
 - There may be a balance owing on your account from the previous session, and we cannot process new registrations unless the full balance owing is paid. Contact your district customer service representatives to find out what your account balance is

General

20. Why didn't I get a Toronto FUN Guide?

- Every residence in Toronto, whether house or apartment, should have received a copy of the FUN Guide
- Occasionally, our distribution service misses a residence, or doesn't leave enough copies for all residents or tenants
- Thank you for letting us know and please accept our apology for the inconvenience
- You can call the distribution company's customer service line to have a FUN Guide re-delivered to your home within 24 hours, or you can pick up a copy at your local community centre or library

21. Touch-tone is better for me, but I have a personal computer at home. When is the City going to offer Internet registration?

- Internet registration is the next step in the expansion of our registration processes
- We are preparing to offer the Internet as a registration option in the next year The Toronto FUN Guide is available

CITY OF TORONTO APPROVED PRIORITY CENTRES

East District	North District	South District	West District
Bliss Carman Sr. P.S. Galloway Road P.S. Oakridge C.R.C. Secord C.C. Warden Ave. Jr. P.S. Warden Woods C.C.	Driftwood C.C. Flemington C.R.C. Lawrence Heights C.C. O'Connor C.C. Oakdale C.C.	Jimmie Simpson C.C. Masaryk-Cowan C.C. Regent Pk – Rec. Cen. N Regent Pk – Rec. Cen. S Rose Avenue Harrison Baths John Innes C.C. Scadding Court C.C.	Elmbank C.C. Kingsview Village C.S. North Kipling C.C. Rockcliffe M.S. Chalkfarm C.C. Falstaff C.C.

- The above program centres were designed as Priority Centres by Council in July 1999 as part of the Interim Welcome Policy
- Centres were identified as priority centres when more than 30% of families in the surrounding census tract were below Low Income Cut Off for large urban areas
- All programs offered at 25 designated facilities in high-needs area are free