



**Massachusetts Registry of Motor Vehicles**

**ATLAS**

**Business Portal Help Documentation**

September 23<sup>rd</sup>, 2019



---

<b>Disclaimer</b> .....	3
<b>Logging Into ATLAS</b> .....	4
<b>Navigation</b> .....	5
Navigation .....	5
Navigation Panel .....	5
Context Bar .....	5
Field Colors.....	7
Tabs and Buttons .....	8
Tabs and Sub-Tabs .....	8
Hyperlinks .....	8
Buttons.....	8
Selector Buttons.....	8
Toggle Buttons .....	9
<b>Bookmarks</b> .....	10
Bookmarks .....	10
Add a Bookmark.....	11
View Your Bookmarks .....	12
<b>Lists</b> .....	13
Lists .....	13
Arranging Columns in a Lists .....	14
Sort Lists Using Column Headings.....	15
Set a Default List View .....	16
Save a List View.....	17
<b>Searching</b> .....	18
Search for Customers and Accounts.....	18
Use the Additional Information Icon .....	19
Search by Name .....	20
Search by an Address .....	21
Search by ID .....	22
Filter and Sort Search Results .....	23
Filter a List.....	23
Clear a Filter .....	23



---

View Top Matches.....	23
View the Number of Results Returned .....	23
Sort Search Results.....	23
Punctuation Guidelines for Searching .....	24
Search for Changed or Invalidated Information .....	25
Narrow your Search Criteria .....	26
<b>Customer and Account Information .....</b>	<b>27</b>
Working with Customer Accounts .....	27
Access the Account Springboard .....	28
Viewing Issued License or ID Information.....	29
Viewing Placard Information .....	30
Viewing Enforcement Information .....	31
<b>Job-Specific Functionality.....</b>	<b>32</b>
Generate Digitized Image Letter.....	32
Adding a Non-Renew .....	33
Removing or Satisfying a Non-Renew.....	34
Adding a Parking Ticket.....	35
Ceasing a Parking Ticket.....	36
Update a Garaging Address .....	37
Excise Tax Recommitment .....	38
MSRP Valuation for Excise Tax.....	39
Searching for EVR Inventory Orders .....	40
Correct a Surchargeable Event .....	41
Reverse a Surchargeable Event.....	42
Add a Suspension .....	43
Reverse a Suspension.....	44
Remove a Suspension .....	45
Changing a Suspension .....	46



## Disclaimer

This help documentation is meant to guide users through universal system functionality that all users will encounter.

In addition, the document contains a *Job Specific Functionality* section with step-by-step instructions on job specific transactions. Access to this functionality is dependent on your security. You may not have access to all transactions in this section. You will only have access to functionality in this section that is needed to perform your job.



## Logging Into ATLAS

A security code must be provided to access the ATLAS Business portal each time you log in. To request a security code:

1. Entering your Username and Password.
2. Select the **Request Security Code** hyperlink.
  - The security code will be e-mailed to your business e-mail provided to the RMV.



**Please allow up to two minutes to receive your security code. If the code is not in your inbox, check your Junk file for an e-mail from [RMVDoNotReply@state.ma.us](mailto:RMVDoNotReply@state.ma.us).**

3. Enter the security code.
4. Click the **Logon** button.



## Navigation

### NAVIGATION

The system includes springboards and windows that you use to search for, view, and modify information.

The navigation topics in the list below describe how to navigate within the system, as well as how to perform various functions that are consistent across all areas of the system.

### NAVIGATION PANEL

The navigation panel is located on the sidebar and displays a list of windows and springboards that are currently open. The window that you are currently viewing is highlighted in blue in the list.

To view a different window, click the window name hyperlink in the list.

To close a window, click the gray **Close Manager** icon (X) to the right of the window name.

To close all open windows, click the **Application Menu** icon (three vertical dots) next to the New Manager hyperlink and click the **Close All Managers** hyperlink.

To un-pin the sidebar, click the **Menu**  icon. When the sidebar is hidden, you can access it by clicking the **Menu** icon. To re-pin the sidebar, click the **Menu** icon and **Pin**  icon.

To log off the application, click the **User Options** icon and the **Logoff** hyperlink.

You can click the **Close Group** (X) icon to close all windows in the group.

- Depending on how a window is accessed, it may be grouped with other windows in the navigation panel. Windows are grouped together when accessed in a logical flow. For example, if you access the Account springboard for an account from the Customer or Entity springboard, those two windows are grouped together in the navigation panel.

### CONTEXT BAR

The context bar is displayed at the top of the system window. The context bar displays information about both the manager and springboard you are viewing and the specific record you are viewing. For example, if you are on the Customer or Vehicle springboard, the context bar displays the customer's name and ID number (or masked ID number).



MARK SMITH \*4646  
Customer

The color of the context bar varies depending on the type of information you are viewing:

Dark blue indicates customer- or vehicle-related information.

Green indicates account- and financial-related information.

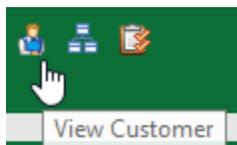
Orange indicates compliance- and task-related information.

Red indicates security-related information.

Light blue indicates information with no context.

Context icons, located in the context bar, allow you to quickly navigate to related springboards.

Click an icon to access the associated springboard.



When applicable, an audit trail is displayed in the context bar. The audit trail is displayed after a user has edited the information on the current window and includes the user's username and the date the work was done. You can click the audit trail hyperlink to view contact information for that user.

Archie Cheetah 08-Mar-2019

The icons in the context bar allow you to perform several different functions:

Click the **User Options** icon to view the following options

- Click **My Profile** to view your user profile.
- Click **Interface Options** to change your visual interface settings.
- Click **Lock Session** to lock your session.
- Click **Log Off** to log off and end your session.

Click the **Bookmark** icon to add and view bookmarks.



## FIELD COLORS

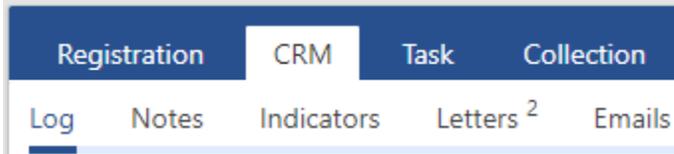
Color	Meaning	Description
Gray	Default	<p>The field is in view-only mode and does not currently accept data entry.</p> <p>Examples of view-only fields could be:</p> <p><i>A fixed value</i> that can only be assigned by the system, such as an <i>Account ID</i>.</p> <p>In an existing record, a value that is not currently editable. However, certain non-editable fields can become editable when you click a <b>Change</b> or <b>Edit</b> button (or other buttons that allow you to modify individual fields, such as <b>Valid</b> or <b>Cease</b>).</p>
Red	Error	<p>The field is in error. Fields become in error when the data entered does not follow certain pre-defined rules. For example, you cannot save a record with a <b>Cease</b> date that is chronologically earlier than the <b>Commence</b> date.</p> <p>A small red triangle in the upper-left corner of a field also indicates that a field is in error.</p> <p><b>Note:</b> You can either click in a field in error or hover your cursor over the field in error to display the tip text describing the error.</p>
Yellow	Required	<p>The field must be completed. A small orange triangle is also displayed in the upper-left corner of required fields.</p> <p>Depending on the situation, a user may not be allowed to save their work if any required fields remain uncompleted.</p> <p><b>Note:</b> After a value is entered into a required field, the field background changes to green. If the value is removed, the field background changes back to yellow.</p>
Green	Optional	<p>The field is enabled. You may enter a value in this field. If this field is left blank, the record can still be saved.</p>



## TABS AND BUTTONS

### TABS AND SUB-TABS

Tabs are used to organize large quantities of information on a window. Each tab, in turn, can have multiple sub-tabs. Clicking a tab displays information corresponding to the tab label. When a tab is selected, its sub-tabs are then displayed beneath the selected tab.



Tabs and sub-tabs may display a superscript number or asterisk (\*). A number indicates the number of items listed on that tab or sub-tab. An asterisk indicates there is data on that tab or sub-tab.

### HYPERLINKS

Hyperlinks allow you to navigate to different areas of the system and perform actions within the system. Some hyperlinks are displayed at the top of a panel or section. They are used to take an action, add a record, or select an option related to that particular area of the window.

### BUTTONS

Buttons are displayed in the context bar, as well as on some windows. These buttons are specific to the window being displayed. They normally provide quick links to actions you may want to take given the context of the window you are viewing.



### SELECTOR BUTTONS

Selector buttons allow you to filter the data that is displayed. Selector buttons allow you to select between several available filters.





## TOGGLE BUTTONS

Toggle buttons allow you to filter the data that is displayed. Toggle buttons allow you to toggle specific filters on or off and include a check mark icon if selected.



## NEW MANAGER WINDOW

The New Manager window is used to access certain managers within the system. You can access the New Manager window at any time by clicking the **New Manager** hyperlink in the sidebar, or by pressing the **Alt**+up arrow keys on your keyboard. The New Manager window may be displayed by default when you open the system, depending on your agency's business processes.

A variety of information is displayed on the New Manager window:

The Logon Bar, located at the top of the New Manager window, displays information about the logged-on user's current and prior sessions. You can click the Log Off button in the Logon Bar to log off of the system.

Additional information on the New Manager window is divided into five panels. You can access managers, springboards, or other items from the New Manager window by clicking the hyperlinks displayed in each panel:

- **Managers** - These represent areas of the system that are used to perform particular sets of tasks.
- **Favorites** - This allows users to select favorite managers used most frequently for quick access. This only displays if a favorite has been set.
- **Bookmarks** - Any bookmarks added by, or sent to the logged in user are displayed. This only displays if any bookmarks exist.
- **Tasks** – Any tasks currently assigned to the logged-in user are displayed.
- **Recent** – Any customers, accounts, etc., that have recently been viewed.

To open a manager, click the manager name hyperlink in the New Manager window.

You can also use the *Filter* field at the top of the New Manager window to filter the items displayed on the New Manager window. Once the list has been narrowed down, the first item in the list is displayed in blue highlighted text. Press **Enter** on your keyboard to access that item, or continue filtering until the manager you want to use is highlighted.



## Bookmarks

### BOOKMARKS

Bookmarks allow users to quickly access a window or springboard in the system. You can add a bookmark for yourself or send a bookmark to other users.

If you frequently view a specific tab or sub-tab on a springboard, or if you want a colleague to view a specific tab or sub-tab, you can add a bookmark with that tab or sub-tab selected. When that bookmark is accessed, that tab or sub-tab is displayed automatically.

You can also add a bookmark with certain search criteria saved. When you access that bookmark, you can quickly perform the search without having to re-enter the search criteria. You can also send a bookmark with saved search criteria to a colleague to enable them to quickly view the same search as you.

If you arrange columns in a list, you can add or send a bookmark with that column arrangement saved. When you or another user views the bookmark, the columns are arranged as you had indicated.



## ADD A BOOKMARK

You can create bookmarks that allow you to quickly access a specific window.

To add a bookmark:

1. Access the window you want to bookmark.
2. Click the Bookmark icon  in the context bar.
3. Select **Add Bookmark**.
4. A suggested name for the bookmark is displayed in the **Description** field. You can either use the suggested name or type in a different name for the bookmark. In the **Note** field, you can choose to add a note about the bookmark.
5. Click the **OK** button. The bookmark is saved.



## VIEW YOUR BOOKMARKS

You can view a list of your bookmarks, as well as a list of the bookmarks you have sent to other users, on the Bookmark window.

To view your bookmarks:

1. Click the Bookmark icon  in the context bar.
2. Click **View Bookmarks**. The Bookmarks window is displayed:
  - The **My Bookmarks** tab displays your bookmarks, including bookmarks that have been sent to you from other users.
  - The **Sent Bookmarks** tab displays bookmarks you have sent to other users.
  - The **Deleted Bookmarks** tab displays bookmarks you have deleted.

To view bookmarks from the New Manager window:

1. Access the New Manager window. A list of bookmarks is displayed in the **Bookmarks** section.
  - **Note:** If you do not have any active bookmarks, the **Bookmarks** section is not displayed on the New Manager window.
2. Click the **Manage** hyperlink in the **Bookmarks** section. The Bookmarks window is displayed. Here, you will find tabs to view your saved, sent, and deleted bookmarks.
  - **Note:** A bookmark that is displayed in bold text in the Bookmarks list indicates that another user has sent you that bookmark. Once you access the sent bookmark, the bookmark name is no longer bolded.



## Lists

### LISTS

You can manipulate lists with gray column headers to display information you want to see or hide information you don't want to see, based on the columns available in the list. You can also display this information in a variety of ways. Depending on your needs for the list, you can:

Arrange columns in a list

Sort lists using column headings

Set a default list view

Save a list view



## ARRANGING COLUMNS IN A LISTS

You can customize the columns in a list by changing which columns are visible, selecting which order to display the columns in, and changing the widths of the columns, as desired.

To arrange the columns in a list:

1. View the list you want to customize.
2. Click the Menu icon  in the context bar.
3. In the **Views** menu, select **Customize**. The Table Views window is displayed.
  - a. **Note:** In the Table Views window, the columns listed in the Columns section are displayed in the list. The order that the columns are listed in the Columns section determines the order that the columns are displayed in the list. The higher a column is displayed in the Columns section, the further left it is displayed in the list. The columns listed in the Hidden Columns section are not displayed in the list.
4. Click and hold a column name (or the Move icon  next to the name) and drag the column:
  - a. To the Hidden Columns section to remove it from the list view.
  - b. To the Columns section to display it in the list.
  - c. To the position within the Columns section where you want to display the column in the list. Drag a column up in the Columns section to move it to the left in the list, and drag a column lower in the Columns section to move it to the right in the list
5. You can click the **Auto Adjust Width** hyperlink to allow the system to automatically adjust the width of each column to fit within the standard list width.
6. Click **Save** when you are done making changes. The list is displayed, reflecting the changes you made.
  - a. Once you have arranged the list to suit your preferences, you can save your settings as list views so that you can access them at a later time. To do this, you need to save a list view or overwrite an existing view. Alternatively, you can publish your settings as public list views so that other users can use those settings.



---

## SORT LISTS USING COLUMN HEADINGS

In a list, the entries are usually displayed in alphanumerical order according to the first column header. However, you can choose to sort a list by other columns. You can also choose to sort a list by multiple columns.

To sort a list in alphanumerical order by a certain column:

Click the column header you want to sort by. An upward sort arrow ▲ is displayed to indicate that the column is sorted in ascending order (smallest number or earliest date at the top of the list, or in alphabetical order).

Click the column header again to sort in descending order. A downward sort arrow ▼ is displayed to indicate that the list is sorted in descending order (largest number or most recent date at the top of the list, or in reverse alphabetical order).

Click the column header a third time to remove the sort. An upward or downward arrow is no longer displayed.

To sort by multiple columns:

To sort in ascending order, click the column header of the first column you want to sort the list by, then hold down the **Ctrl** key on your keyboard and click the other column headers in the order that you want the list to be sorted. A single sort arrow ▲ indicates the first priority; a double sort arrow ▲▲ indicates the second priority, and so on.

To sort in descending order, hold the **Ctrl** key and click the column header again. Downward sort arrows ▼▼ are displayed to indicate that the column is sorted in descending order.



---

## SET A DEFAULT LIST VIEW

You can set any of your list views as the default view for the list.

**Note:** You need to create a new view prior to setting it as default. Save a list view after you have adjusted settings for a list to be able to set that view as a default list view.

To set a default view for a list:

Access the list you want to set a default view for.

Click the Menu icon **☰** for the list.

In the **Views** menu, select **Customize**. The Table Views window is displayed.

Select the option button in the **Default** column next to the view you want to set as the default. The selected default view is automatically displayed each time you view the list.

Click the **Save** button to set the new default view. The new default view is displayed.



## SAVE A LIST VIEW

Once you have arranged a list to suit your preferences, you can save your settings as list views so that you can access them at a later time. This functionality also allows you to create and save multiple views for the same list.

To save a view for a list:

Access the list you want to save a list view for.

Prepare the view as you want it to be saved, completing the following processes, as desired:

- Sort lists using column headings
- Adjust column widths
- Invert a list
- Outline a list
- Filter lists

Click the Menu  icon.

In the **Views** menu, select **Customize**. The Table Views window opens.

Arrange the columns in the Columns and Hidden Columns sections, as required for the view you want to create.

- **Note:** You can also adjust the width of a column here by editing the appropriate value in the **Width** column.

To save the current view for your use only, in the Views section, click the **New View** button. Enter a unique name for the view in the **New View** field and click the **OK** button.

- **Note:** Views saved in this fashion are saved for you only. Saving a new view in the Views section does not make that view available to other users, nor does setting a default view in the Views section make that view the default for other users.

Click the **Save** button at the bottom of the Table Views window. Your new view is saved using the settings you specified.



## Searching

### SEARCH FOR CUSTOMERS AND ACCOUNTS

You can use the Search springboard to search for a customer or account using a wide array of information, including names, certain ID numbers, address information, telephone numbers, and email addresses. A number of search guidelines can be used to improve your search results, such as punctuation guidelines for searching, guidelines on how to search with partial or missing information, and tips on how to narrow your search criteria.

To search for a customer or account:

1. Enter your search criteria into the *Search* field.
2. Click the **Search** button. The results of your search are displayed.
  - a. By default, the system searches for everything that begins with the characters you enter. For example, searching for *Gre* returns all data that starts with those three letters.
  - b. Click the customer or entity name hyperlink to open the related Customer springboard.
  - c. Click the account ID hyperlink (if available) to open the Account springboard for that customer's account.



***USE THE ADDITIONAL INFORMATION ICON***

You can click the Additional Information  icon next to a customer or entity's name to show information about that customer or entity's accounts, collections, and audits, if applicable. From the additional information that is displayed, you can:

Click an account ID hyperlink to open the related Account springboard.

Click a collection hyperlink to open the related Collections springboard.

Click an audit hyperlink to open the related Audit springboard.

Click a customer or entity ID hyperlink to open the related Customer of Entity springboard.



## SEARCH BY NAME

You can search for a customer or entity by name. To search for a customer or entity by name:

1. Access the Search springboard.
2. Enter the name in the *Search* field.
3. Click the **Search** button. The results of your search are displayed.

The customer type may impact how you enter your search criteria:

For individual customer names, enter the customer's last name, then a comma, then the first name (*last name, first name*). For example, *Smith, David* searches for customers with the last name *Smith* and first name *David*.

For business customers, format the search without a comma. For example, *Ames Construction Inc* searches for businesses with the name *Ames Construction, Inc*. When a comma is included in a name search, the system attempts to locate an individual customer.

You can search for both business and individual customers by entering just one name into the search field. For example, *Anderson* would return both *Anderson's Bicycle Shop* and *John Anderson*.



## SEARCH BY AN ADDRESS

You can search for a customer or entity using address information. To search for a customer or entity by address:

1. Access the Search springboard.
2. Enter a complete or partial address into the *Search* field.
  - You must separate each portion of the address with a comma, for example, *123 Main St, Quincy, MA, 02170*. Searching for *123 Main St Quincy MA 02170* does not return the desired results.
3. Click the **Search** button or press **Enter** on your keyboard. The search results are displayed.
  - **Note:** There are some circumstances that may merit a search for only a ZIP or postal code. To perform a ZIP or postal code search, type the code into the *Search* field and press **Enter**. If you want to narrow the search results, you may add in any extra digits, as appropriate for the ZIP code.



## **SEARCH BY ID**

Nearly any ID number for a customer, entity, or account can be used to quickly search for a customer's or entity's information. This includes a VIN, Plate Number, Credential Number, and many more.

To search for a customer or entity by ID:

1. Access the Search springboard.
2. Enter the ID number into the *Search* field.
3. Click the **Search** button or press **Enter** on your keyboard. The search results are displayed.
  - You can click the customer or entity name hyperlink to open the related Customer or Entity springboard. If the ID is associated with a particular account, you can click the account number hyperlink to open that Account springboard.



---

## **FILTER AND SORT SEARCH RESULTS**

### ***FILTER A LIST***

After you conduct a search on the Search springboard, a filter list is displayed to the left of the search results. This list displays the types of matches, customers or entities, and accounts returned in your search results. By clicking any of the hyperlinks in the list, you can choose to display only items that correspond with the selected types of matches, customers or entities, or accounts. You can select one type from each separate group to continue filtering the search results. If your search matches on inactive data, you may also choose to view only active or inactive results.

If you have selected one or more filters, the match, customer or entity, or account types that are not represented in the filtered list, if any, are displayed in gray text in the filter list.

### ***CLEAR A FILTER***

To clear a filter, click the filter name hyperlink again. To clear all filters, click the **All** or **Top #** hyperlinks at the top of the filter list.

### ***VIEW TOP MATCHES***

When a search returns more than the designated amount of top matches, as defined by your agency, a **Top #** hyperlink is displayed next to the **All** hyperlink at the top of the filter list. Click the **All** hyperlink to display additional matches. Click the **Top #** hyperlink to display only the top matches up to the designated amount, usually 50.

### ***VIEW THE NUMBER OF RESULTS RETURNED***

When the search results are filtered, or if your search has returned more than the designated amount of top matches, there is a label in the upper-right corner above the search results that displays the number of results currently displayed and how many total results there are.

### ***SORT SEARCH RESULTS***

When your search results return more than one match, a **Sorted by** hyperlink is displayed above the search results list. You can click this hyperlink to sort the search results using one of



the available criteria. Some examples of criteria you may be able to sort by include first name, last name, city, and ID.

## **PUNCTUATION GUIDELINES FOR SEARCHING**

For most search criteria, punctuation is not required, although you may include it if you want. For example, you can search for a phone number with or without the hyphens and parentheses. In some situations, however, the proper punctuation is required:

When searching for an individual by name, use commas to separate out the parts of the name.

- For example, entering *Anderson Marla* does not return the customer named *Marla Anderson*, while entering *Anderson, Marla* does.

When searching for a business by name, conduct the search without commas, even if the business name contains them. When a comma is included in a name search, the system attempts to locate an individual customer.

- For example, entering *Research, Inc* does not return the customer named *Research, Inc.*, while entering *Research Inc* does.

When searching for an address, use commas to separate out the parts of the address.

- For example, entering *1326 Broadway Ave Boston MA* does not return the customer at that address, while entering *1326 Broadway Ave, Boston, MA* does.



## **SEARCH FOR CHANGED OR INVALIDATED INFORMATION**

If a customer or entity's information has changed or been invalidated, it is still possible to perform a search based on the historical information. Invalidated information is displayed in a gray match bar to indicate that the information is inactive. The current name of the customer or entity can be found in the search results. Clicking the Additional Information ⓘ icon also displays invalidated or ceased accounts in gray text.

Because the system stores all historical and invalidated information, invalidated customers, entities, and accounts are still accessible.



## **NARROW YOUR SEARCH CRITERIA**

Each agency has a maximum number of search results that can be returned, usually 500 or less. Within that maximum number, a selected number of the best matches are displayed, usually 50.

It is important to refine your search criteria to return as few results as possible, but still retrieve the results you need. To narrow your results, you can try the following:

Try to include as much information as possible in a search.

- For example, if you search using only the last name (especially with common names such as *Smith*), the search may take longer and result in many matching records, whereas using a first and last name (such as *Smith, David*) retrieves more specific results and takes less time.

When possible, use specific search criteria such as IDs, phone numbers, addresses, or email addresses. These types of criteria are more likely to return distinct search results.



## Customer and Account Information

### WORKING WITH CUSTOMER ACCOUNTS

An account represents a customer's driver's license, state ID, handicap ID, or other applicable credential. A Driver's License account can include information for both the customer's NCL and CDL licenses, and/or permits associated with those licenses.



## ACCESS THE ACCOUNT SPRINGBOARD

There are several ways to access the Account springboard:

From the Customer springboard:

1. Search for and select the appropriate customer or entity. The Customer or Entity springboard opens with the selected customer or entity in context.
2. View the **Registration** or **Vehicle** tab, and then click the **Accounts** sub-tab.
3. In the Accounts list, click the account ID hyperlink for the appropriate account. The Account springboard opens.

From the Search springboard when searching by customer:

1. Search for the customer or entity. (Do not proceed to open the Customer or Entity springboard.)
2. In the search results, click the Additional Information  icon.
3. In the Additional Information window, click the account ID hyperlink.

From the Search springboard when searching by account ID:

1. Search using the account ID.
2. In the search results, on the far right of the entry, click the account type hyperlink.  
**Note:** The account type is only displayed if you perform a search using an account ID.

From a panel or list:

1. In most instances where an account ID hyperlink is displayed (often found in an **Account** column), click the account ID hyperlink to access the Account springboard.

From a related window:

1. When you are working in a window related to an account, the Account  icon may be displayed in the context bar. Click the Account  icon to access the Account springboard.



## **VIEWING ISSUED LICENSE OR ID INFORMATION**

After you register a customer or re-issue a customer's license, a record of the registration information that was entered is kept in the system.

To view information on an issued license or ID:

1. Access the Account springboard for the customer whose account information you want to view.
2. On the **Licensing** tab, view the **Licenses** sub-tab.
3. To view more details for a credential click the **Issued** hyperlink. The credential details are displayed.
4. To view the licensing activity related to the credential, click the **View Activity** button.



## VIEWING PLACARD INFORMATION

Placard information can be found on the Disabled Parking Account springboard.

The attributes section of the springboard contains both customer and placard information.

Beneath the attributes section, the Recent Notes section of the springboard displays the 3 most recent notes associated with the Disabled Parking Account.

The Open Tasks section contains the 3 tasks associated with the Disabled Parking Account that have the soonest deadlines.

The **Licensing** tab contains information related to any current and former placards about current and former placards, including the type of placard, when it was issued, when it expires, the issue type, and the placard number.



## VIEWING ENFORCEMENT INFORMATION

Enforcement information can be found on the Driver/ID Account springboard.

The Enforcement tab of the Driver/ID Account springboard contains all enforcement-related information associated with the account. The Enforcement tab contains a variety of sub-tabs, including:

The **Citation** sub-tab lists all citations that have been successfully posted to the Driver/ID Account, including citations that are open, closed and paid for, waiting on hearings, warnings, etc.

The **Finding** sub-tab displays information as to whether or not the customer was found guilty for any of the citations that they have/have had on their account.

The **Sanction** sub-tab stores all sanction information for any offense on the account (usually due to a suspension).

The **Restraints** sub-tab contains all suspensions and sanctions associated with the Driver/ID Account, including a visual chart displaying when the restraints were added and when they will end.

The **Requirement** sub-tab contains a list of all the requirements currently active on the account.

The **Certificate** sub-tab contains documents stating that the customer has met a requirement and serve as proof of completion.

The **Reinstatement** sub-tab displays information pertaining to any reinstatements associated with the Driver/ID Account.

The **Non-Renew** sub-tab displays all active non-renews associated with the Driver/ID Account.



## Job-Specific Functionality

### GENERATE DIGITIZED IMAGE LETTER

To generate a digitized image letter:

1. Navigate to the **Search manager**.
2. Click the **I Want To** tab.
3. Click the **Generate Digitized Image Letter** hyperlink.
4. On the CORI Image Activity Letter Activity springboard, click the **Search for Driver** section button.
5. Use the search field to search for the customer. Then click their **Name** hyperlink.
6. Click the **Account** hyperlink.
7. Click the applicable selector buttons.
8. Click the **Save** button.
9. The completed activity displays. To access the letter, click the **CRM** tab, **Letters** sub-tab.
10. To print the letter, select the **Issue** checkbox, then click the **Issue** section button.
11. The letter will open in a new browser tab and can be printed using normal printing procedures.



## **ADDING A NON-RENEW**

To add a non-renew:

1. Navigate to the appropriate Account springboard.
2. Click the **Enforcement Services** button.
3. On the Enforcement Launchpad, select the appropriate **Non Renew Action** hyperlink.
4. Enter the appropriate information.
5. Click **Save**.



## REMOVING OR SATISFYING A NON-RENEW

To remove a non-renew:

1. Navigate to the appropriate Account springboard.
2. Click the **Enforcement** tab, **Non-Renew Violations** sub-tab.
3. Click the hyperlink in the **Activity Type** column.
4. Under the *Attributes* panel, click the **Change** hyperlink to make the fields editable.
5. Enter an end date into the **Cease Date** field.
6. Click the **Save** button to close the activity and remove the non-renew.



**The cleared non-renew will only appear in the Enforcement tab, Non-Renew Violations sub-tab if the Show History hyperlink has been selected.**



## **ADDING A PARKING TICKET**

To add a parking ticket:

1. Navigate to the appropriate Vehicle Ownership Account springboard.
2. Click the **Enforcement Services** button.
3. On the Enforcement Launchpad, select the **Add a Parking Ticket** hyperlink.
4. Enter the required information.
5. Click **Save**.



**The Registration Status will remain active if the Vehicle Ownership Account only has one parking ticket. The Non-Renew will not go into effect until a minimum of two parking tickets exist for the Vehicle Ownership Account.**



## CEASING A PARKING TICKET

To cease a parking ticket:

1. Navigate to the appropriate Vehicle Ownership Account springboard.
2. Navigate to the **Enforcement** tab, **Non-Renew Violations** sub-tab.
3. Select the **Activity Type** hyperlink for the ticket to be ceased.
4. Select the **Edit** icon to edit a single ticket, or the **Clear All** hyperlink to clear multiple tickets by jurisdiction.
5. Enter the **Cease Date** for the ticket.
6. Select the **Save** action button.
7. Select the **Close** icon or button.



**Ceased tickets may be viewed using the Show History hyperlink in the Enforcement tab and Non-Renew Violations sub-tab.**



## UPDATE A GARAGING ADDRESS

The garaging address dictates the jurisdiction that will bill the customer for excise tax.

To amend a vehicle's garage address:

1. Access the appropriate Vehicle Ownership Account springboard.
2. Select the **City and Town Services** button.
3. In the Vehicle Actions section, select the **Update Garaging Address** hyperlink.
4. Complete the fields, as necessary.



**The ATLAS Business Portal verifies the address with the United States Postal Service (USPS) once you tab off the Single Line Address field. If the address does not verify, select the Verify button to resolve the error or override the address.**

5. Select the **Save** button.



**Once the address is changed, the new Garaging Town will not result in an Excise Tax Commitment unless the Excise Tax Recommit transaction is completed.**



## EXCISE TAX RECOMMITMENT

To recommit excise tax for a vehicle:

Access the appropriate Vehicle Ownership Account springboard.

Select the **City and Town Services** button.

In the Excise section, select the **Excise Recommit** hyperlink.

In the Excise Year section, select the checkbox for the Eligible Recommit Year.

Select the **Next** button.



**Do not save the work item until each section of the transaction has been completed.**

In the Recommit Address section, input the updated garage address.



**If the garaging address on file is correct, select the Use Current Address button**

Select the **Next** button.

Review the fields and select the **Save** button.

Select the **Complete** button.

Select the **Confirm** button.



## **MSRP VALUATION FOR EXCISE TAX**

To request an update of the MSRP valuation for a vehicle:

Access the appropriate Vehicle Ownership Account springboard.

Select the **City and Town Services** button.

In the Excise section, select the **Excise Vehicle MSRP Valuation Update** hyperlink.

Enter the MSRP value in the **MSRP** field.

Select the **Save** button.



**Once saved, the work item will be sent to the RMV's Customer Assistance Bureau to review the value and approve the update.**



## SEARCHING FOR EVR INVENTORY ORDERS

EVR Inventory Orders submitted on the MyRMV website by EVR users are searchable in the Business portal. To search for an inquire of an order:

1. From the New Manager window, click the **Search** manager.
2. Click the **All** tab.
3. Click the **Order Search** hyperlink.
4. Select the EVR location in the **To Location** field.
5. Click the **Search** hyperlink.
6. Click the **Order ID** hyperlink to view an order.



## CORRECT A SURCHARGABLE EVENT

To correct a surchargable event:

1. Access the appropriate Account springboard.
2. Click the **Enforcement** tab, **Finding** sub-tab.
3. Click the **Record ID** hyperlink.
4. The Driver Verdict springboard displays. Click the **I Want To** section button.
5. In the Change section, click the **Correct** hyperlink.
6. The fields now are green and editable. Change the desired field(s).
7. Click the **Save** button.



## REVERSE A SURCHARGABLE EVENT

To reverse a surchargable event:

1. Access the appropriate Account springboard.
2. Click the **Enforcement** tab, **Finding** sub-tab.
3. Click the **Record ID** hyperlink.
4. The Driver Verdict springboard displays. Click the **I Want To** section button.
5. In the Remove section, click the **Reverse** hyperlink.
6. Select the appropriate **Reversal Reason** hyperlink.
7. The Confirm Reverse window displays. Click the **Yes** button to confirm the reversal.

**Note:** The reversed surchargable event will only appear in the **Enforcement** tab, **Finding** sub-tab if the **Show History** section button has been clicked.



## **ADD A SUSPENSION**

To add a suspension through an administrative offense:

1. Access the appropriate Account springboard.
2. Click the **Enforcement Services** button.
3. Click the **Add an Administrative Offense** hyperlink.
4. Enter in the required information.
  - a. Note: If applicable, add a note in the **Description** field.
5. Click the **Save** button.



## REVERSE A SUSPENSION

To reverse a suspension through an administrative offense:

1. Access the appropriate Account springboard.
2. Click the **Enforcement** tab, **Finding** sub-tab.
3. Click the **Record ID** hyperlink for the applicable administrative offense.
4. Select the **I Want To** section button.
5. In the Remove section, click the **Reverse** hyperlink.
6. Click the hyperlink for the **Reversal Reason**.
7. The Confirm Reverse window displays. Click the **Yes** button to confirm the reversal.

**Note:** The reversed suspension will only appear in the **Enforcement** tab, **Finding** sub-tab if the **Show History** section button has been clicked.



## REMOVE A SUSPENSION

If the suspension requirements have been met you can remove a suspension. To remove a suspension for an administrative offense:

1. Access the appropriate Account springboard.
2. Click the **Enforcement Services** action button.
3. Select the **Add a Certificate** hyperlink
4. Select **Proof of Clearance** hyperlink
5. Enter the appropriate dates.
6. Select *Yes* for the **Clearance** field
7. Click the **Save** button
8. Click the **I Want To** section button
9. Select the **Comply** option
10. Select the hyperlink for the appropriate Proof of Clearance
11. Click the **Save** button

**Note:** The removed suspension will only appear in the **Enforcement** tab, **Finding** sub-tab if the **Show History** section button has been clicked.



## CHANGING A SUSPENSION

To change a suspension through an administrative offense:

1. Access the appropriate Account springboard.
2. Click the **Enforcement** tab, **Finding** sub-tab.
3. Click the **Record ID** hyperlink for the applicable administrative offense.
4. Select the **I Want To** section button.
5. In the Change section, select the **Correct** hyperlink.
6. The fields in the activity are now green and editable. Change the desired field(s).
7. Click the **Save** button.