



Massachusetts Registry of Motor Vehicles
ATLAS

Driving Schools eServices Portal Help
Documentation

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GENERAL eSERVICES PORTAL HELP

LOGGING ON TO THE eSERVICES PORTAL

Prior to first-time use to the ATLAS eServices Portal, first time users will receive an email from the RMV with a link to the eServices Portal logon page. User logons are added by your business's eServices Administrator. If your business does not have an administrator, click the **Learn More** hyperlink on the eServices Portal logon page for more information.


To log on to eServices:

1. From the appropriate email, single-click the **Click to log in** hyperlink.
2. Type in a password that meets the requirements listed in the Password Rules section.
3. Re-enter the password in the **Confirm Password** field.
4. Click **Submit**.
5. Click **OK**.
6. Enter your username and password.
7. Click **Logon**.
8. Click the **Send Authentication** hyperlink to get a security code for this login. A pop-up window is displayed indicating that the confirmation has been sent to the user.
9. Enter the code into the **Authentication Code** field.
10. Click the **Logon** button.



LOGGING OFF THE eSERVICES PORTAL

To log off the eServices Portal:

1. Click the **Profile Menu**  icon at the top right of the screen.
2. Click the **Log Off** hyperlink.
3. Click **Yes**.
4. Click **Click Here to Start Over**.

RESETTING A FORGOTTEN PASSWORD

In the event you are unable to remember your password, the portal allows for a password to be reset.

To reset a password:

1. Navigate to the log in screen for the eServices Portal.
2. Select the **Forgot username or password?** Hyperlink.
3. Enter your username.



Your username should be your business email

4. Follow the instructions in your email.



UPDATING YOUR PERSONAL PROFILE INFORMATION

The *User Profile* in ATLAS contains information on the logged-on user. From here, you may have security to update your name, e-mail, and phone number. In addition, you may update your password, secret question, or two-step verification settings.

To update profile information in eServices:

1. Select the **Manage My Profile** hyperlink from the *Business Account* profile.
2. Select the appropriate hyperlink for the profile information you would like to update.
3. Enter the updated information.
4. Click **Ok**.

UPDATING A PASSWORD

Passwords can be changed by the user in the eServices Portal. Changing a password is not the same as resetting, and can be completed after successfully logging in.

To update a password in eServices:

1. Select the **Manage My Profile** hyperlink from the *Web Profile* screen.
2. In the Security panel select the **Change Password** hyperlink.
3. Enter the required fields, indicated by an asterisk.



The bottom of this window contains password requirements.

4. Click **Ok**.



VIEWING OTHER BUSINESS ACCOUNT PROFILES

If you have access to multiple businesses, you can switch the business account you are viewing. Access to additional businesses is granted to your username by that business's eServices administrator. To view a different *Business Account* profile:

1. From the *Business Account* profile, click the **Work With Someone Else** hyperlink.



If you only have access to view or work with one business, the Work With Someone Else will be hidden and will not display.

2. Click the **Business Name** button for the business you wish to view.

VIEWING SUBMISSIONS

You can view web requests, or transactions, you have submitted in the eServices portal by the following:

1. From the *Business Account* profile, click the **More** tab.
2. Click the **Search Submissions** button in the *Submissions* panel.
3. Enter a date range in the **Processed From** and **Processed To** fields that fall within the submission you are searching for.
4. Click the **Search** button.
5. Select the **Title** hyperlink to view the submission.
6. Use the **Previous** and **Next** buttons on the submission to view what was submitted to the RMV.



VIEWING LETTERS

You can view letters sent to your business in the eServices Portal.

To view letters on the *Letters* profile:

1. From the *Business Account* profile, click the **More** tab.
2. Click the **View Letters** button.
3. Click the **Type** hyperlink for the desired letter.
 - A PDF will generate of the letter.



The Inbox tab displays letters for the last 12 months. To access letters older than twelve months, click the Search tab and enter the appropriate date range for the letter. Click the Search button to view letters in this date range.

To view unread letters in the Action Center:

1. From the *Business Account* profile, click the **Action Center** tab.
 - **Note:** The tab will have a counter on it for unread letters.
2. Click the **View Letters** hyperlink.
3. Click the **Type** hyperlink for the desired letter.
 - A PDF will generate listing the Permit ID's issued for each permit type.



MANAGING PAYMENT CHANNELS

You may add and use payment channels in the eServices Portal. Payment channels are payment methods saved in ATLAS to be used when completing different transactions. This saves time of having to key in your payment method for each transaction.

To access *Payment Channels* window to manage payment channels:

1. From the *Business Account* profile, click the **Manage My Profile** hyperlink.
2. Click the **More** tab.
3. Click the **Manage Payment Channels** button.
 - You are now on the *Payment Channels* window.

To add a new payment channel:

1. From the *Payment Channels* window, click the **Setup New Payment Channel** hyperlink.
2. Select the **Payment Channel Type**.
3. Select the **Bank Account Type**.
4. Complete the required fields.
 - a. Note: The **Name** of the Payment Channel defaults to the Bank Name and the last four digits of your Account Number. To update this, click the **No** button and update the **Name** field
5. Click **Save**.

To rename a payment channel:

1. From the *Payment Channels* window, click the **Payment Channel Name** hyperlink.
2. Click the **Rename** hyperlink.
3. Complete the appropriate fields.
4. Click **Save**.



To remove a payment channel:

1. From the *Payment Channels* window, click the **Payment Channel Name** hyperlink.
2. Click the **Remove This Payment Channel** hyperlink.
3. Click **Yes**.
4. Click **OK**.



JOB-SPECIFIC FUNCTIONS

ADDING A STUDENT

To add a student:

1. From the *Business Account* profile, click the **Add Students** hyperlink in the *Manager Students* panel.
2. Enter students in one of the following ways:
 - a. To add a student manually, simply fill in the required fields.
 - i. Note: To add additional students, click the **Add Another Student** hyperlink.
 - b. To import students, click the **Import Students** button and select the file appropriate file. Once the file is chosen, click the **Import** button.

Depending on how many students are imported, there may be multiple pages, in which case can be clicked through by using the forward or back arrows.

 - i. Note: For more information on how to create a spreadsheet to import, click the **Help** button.
3. If the student wants to make a full or partial payment for the program, select the payment type and the amount collected.
4. Click the **Next** button.
5. A summary of the student(s) is displayed. Click the **Submit** button.
6. A confirmation page is displayed. To print the confirmation page, a **Printable View** option is available.
7. Click the **OK** button to navigate back to the *Business Account* profile.

Note: Sign-in sheets will be compared to what is recorded in the eServices portal during a Driving School Audit.



ADDING A MODULE

To add a module:

1. From the *Business Account* profile, click the **Add Module** hyperlink in the *Student Training* panel.
2. Complete the required module information fields.
3. Click the **Next** button.
4. A list of all the students who are eligible for this module, and have yet to complete this module, is displayed. Click the corresponding *Completed?* checkbox for the necessary student(s).
 - a. Note: Some additional information may be required to enter, or optional to enter, on the selected student's row, depending on the module. If the information is available, it should be entered.
5. Click the **Next** button.
6. A summary of the module and student(s) is displayed. Click the **Submit** button.
7. A confirmation page is displayed. To print the confirmation page, a **Printable View** option is available.
8. Click the **OK** button to navigate back to the *Business Account* profile.



ADDING MULTIPLE MODULES VIA UPLOAD

To upload multiple modules:

1. From the *Business Account* profile, click the **Upload Multiple Modules** hyperlink in the *Student Training* panel.
 - a. Select the **Import Modules** hyperlink to upload a spreadsheet.

OR

- b. Key in the appropriate fields and select the **Add Another Module** hyperlink to add additional modules.
2. Click **Next**.
3. A summary of the module and student(s) is displayed. Click the **Submit** button.
4. A confirmation page is displayed. To print the confirmation page, a **Printable View** option is available.
5. Click the **OK** button to navigate back to the *Business Account* profile.



ADDING ON ROAD TRAINING

To add on road training:

1. From the *Business Account* profile, click the **Add an On Road Training** hyperlink in the *Student Training* panel.
2. Enter the required fields for the on road training information, as well as the vehicle information.
3. Click the **Next** button.
4. Enter the total minutes driving and observing into the corresponding student's fields.
 - a. Note: 120 minutes of driving and observing time must be entered for attendees in order to add on road training.
5. Click the **Next** button.
6. A summary of the entered information is displayed. Click the **Submit** button.
7. A confirmation page is displayed. To print the confirmation page, a **Printable View** option is available.
8. Click the **OK** button to navigate back to the *Business Account* profile.



ADDING MULTIPLE TRAININGS VIA UPLOAD

To upload multiple trainings:

1. From the *Business Account* profile, click the **Upload Multiple Trainings** hyperlink in the *Student Training* panel.
 - a. Select the **Import Trainings** hyperlink to upload a spreadsheet.

OR

- b. Key in the appropriate fields and select the **Add Another Training** hyperlink to add additional modules.
2. Click the **Next** button.
3. A summary of the entered information is displayed. Click the **Submit** button.
4. A confirmation page is displayed. To print the confirmation page, a **Printable View** option is available.
5. Click the **OK** button to navigate back to the *Business Account* profile.



UPDATING STUDENT RECORDS

To update a student record:

1. From the *Business Account* profile, click the **View Students** hyperlink in the *Manage Students* panel.
2. Click the **Update** hyperlink next to the corresponding student's name.
3. Update the desired field.
4. Click the **Next** button.
5. A summary of the entered information is displayed. Click the **Submit** button.
6. A confirmation page is displayed. To print the confirmation page, a **Printable View** option is available.
7. Click the **OK** button to navigate back to the *Business Account* profile.

To add a student payment:

1. From the *Business Account* profile, click the **View Students** hyperlink in the *Manage Students* panel.
2. Click the **Student Name** hyperlink for the student.
3. Click the **Add Payment** hyperlink.
4. Select the payment type, then enter the date and amount.
5. Click the **Submit** button.
6. A confirmation page is displayed. To print the confirmation page, a **Printable View** option is available.
7. Click the **OK** button to navigate back to the Business Profile. The payment is now listed on the **Student Payments** tab.

To delete a student payment that was made in-error, or no longer applies:

1. From the *Business Account* profile, click the **View Students** hyperlink in the *Manage Students* panel.
2. Click the **Student Name** hyperlink for the student.
3. Click the **Student Payments** tab.



4. Click the **Delete** hyperlink for the desired payment.
5. Enter a reason for why the payment is being deleted.
6. Click the **Submit** button.
7. A confirmation page is displayed. To print the confirmation page, a **Printable View** option is available.
8. Click the **OK** button to navigate back to the Business Profile. The payment is no longer listed on the **Student Payments** tab.

To delete an exam:

1. From the *Business Account* profile, click the **View Students** hyperlink in the *Manage Students* panel.
2. Click the **Student Name** hyperlink for the student.
3. Click the **Student Exams** tab.
4. Click the **Delete** hyperlink for the desired exam.
5. Click the **Submit** button to confirm the deletion.
6. A confirmation page is displayed. To print the confirmation page, a **Printable View** option is available.
7. Click the **OK** button to navigate back to the Business Profile. The exam is no longer listed on the **Student Exams** tab.

To view student requirements:

1. From the *Business Account* profile, click the **View Students** hyperlink in the *Manage Students* panel.
2. Click the **Student Name** hyperlink for the student.
3. Click the **View Student Requirements** hyperlink.



ADDING MULTIPLE STUDENT PAYMENTS VIA UPLOAD

To upload multiple student payments:

1. From the *Business Account* profile, click the **Upload Multiple Student Payments** hyperlink in the *Student Training* panel.
 - a. Select the **Import Payments** hyperlink to upload a spreadsheet.

OR

- b. Key in the appropriate fields and select the **Add a Record** hyperlink to add additional modules.
2. Click the **Next** button.
3. A summary of the entered information is displayed. Click the **Submit** button.
4. A confirmation page is displayed. To print the confirmation page, a **Printable View** option is available.
5. Click the **OK** button to navigate back to the *Business Account* profile.



VIEWING AND SUBMITTING OFF HOUR ROAD TEST REQUESTS

To view an off hour road test request:

1. From the *Business Account* profile, click the **View Off Hour Road Tests** hyperlink in the *Road Tests* panel.

To submit an off hour road test request:

1. From the *Business Account* profile, click the **Submit an Off Hour Road Test Request** hyperlink in the *Road Tests* panel.
2. A list of all the students who are eligible is displayed. Select students in one of the following ways:
 - a. Click the *Request* checkbox for each desired student.
 - b. Click the **Select All** button to select all students in the list. Remove students by deselecting the *Request* checkbox.
3. Click the **Next** button.
4. A summary of the selected students is displayed. Click the **Submit** button.
5. A confirmation page is displayed. To print the confirmation page, a **Printable View** option is available.
6. Click the **OK** button to navigate back to the *Business Account* profile.
 - a. Note: The off road test request is displayed along with the current status. The request can be edited or cancelled until the *Submitted* status has been changed to *Scheduled by the RMV*.



ISSUING A DRIVER'S ED CERTIFICATE

To issue a Driver's Ed Certificate:

1. From the *Business Account* profile, click the **Issue Driver's Ed Certificate** hyperlink in the *Administration* panel.
2. A list of all the students who are eligible to obtain the certificate is displayed.
Select students in one of the following ways:
 - a. Click the *Issue Certificate?* checkbox for each desired student.
 - b. Click the **Select All** button to issue a certificate for all students in the list.
Remove students by deselecting the *Issue Certificate?* checkbox.
3. Click the **Next** button.
4. Verify that all students selected have completed all requirements by clicking the **I agree with the above statement** button.
5. Click the **Next** button.
6. Select the payment method:
 - a. If you select **Credit/Debit Card** and click the Next button, you will be redirected to an RMV-approved Credit Card website where you can enter in your card information. After entering your card information, you will be able to continue with the activity.
 - b. If you select **E-Check**, you will enter in all your payment information within the eServices portal.
7. Click the **Next** button after a payment method is selected.
8. Enter the payment information.
9. Click the **Next** button.
10. A summary of the selected students is displayed. Click the **Submit** button.
11. A confirmation page is displayed. To print the confirmation page, a **Printable View** option is available.
12. Click the **OK** button to navigate back to the *Business Account* profile.



VIEWING EMPLOYEES

To view employees:

1. From the *Business Account* profile, click the **View Employees** hyperlink in the *Administration* panel.
2. Click the **Employee Name** hyperlink for the employee you wish to view.
 - a. The **Modules Taught** tab lists the modules taught by the employee as well as the module date.
 - b. The **Trainings Taught** tab lists the trainings taught by the employee, the date of the training, and the number of students in each training.
3. To return to the employee list, click the **Back Arrow** icon above the employee's name.



ADDING AN EMPLOYEE

To add employees:

1. From the *Business Account* profile, click the **Add an Employee** hyperlink in the *Administration* panel.
2. Complete the appropriate fields for employee information.
3. Click **Next**.
4. Enter the employee's residential address.
 - a. Answer the prompt on the employee's mailing address and complete the fields as necessary.
5. Click **Next**.
 - a. The system will attempt to verify the address with USPS. If the address is not found with USPS but was keyed correctly, select the **Use Original Address** hyperlink.
6. Click **Next**.
7. Click the **Attach CORI Acknowledgement Form** button.
 - a. Click the **Choose File** button.
 - b. Select the document from your computer.
 - c. Click **OK**.
 - i. Note: A copy of the CORI Acknowledgement Form can be downloaded by selecting the Criminal Offender Record Information Acknowledgement Form hyperlink.
 - d. Note: If the file was added in-error, click the **Remove** hyperlink.
8. Click the **Next** button.
9. A confirmation page is displayed. To print the confirmation page, a **Printable View** option is available.
10. Click the **OK** button to navigate back to the *Business Account* profile.



TERMINATING AN EMPLOYEE

To terminate an employee:

1. From the *Business Account* profile, click the **View Employees** hyperlink in the *Administration* panel.
2. Click the **Terminate** hyperlink for the employee.
3. Enter the **Employment End Date**.
4. Click **Next**.
5. Click **Submit**.
6. Click the **OK** button to navigate back to the *Business Account* profile.



eSERVICES PORTAL ADMINISTRATOR FUNCTIONS

eSERVICES ADMINISTRATOR FUNCTIONS

Each business with access to the eServices Portal has a designated eServices Administrator. This administrator oversees adding and managing logons for their business. Once a logon is added, however, only system access can be updated by the administrator. Any demographic information for the user must be updated by the logged-on user, not the administrator.

ADDING A LOGON

To add a logon:

1. Select the **More** tab from the *Business Account* profile.
2. Select the **Add a New Logon** button.
3. Enter the user's email address and name in the appropriate fields.
4. Select the **Grant Access** button for all accounts you the user should have access to.
5. Select the **Access Level** for each account.
6. Select the **Next** button.
7. Select the **I Agree** button.



By selecting I Agree, you & your company are confirming the user has been vetted & meets requirements outlined in your access agreement. Your company is responsible for the user's actions.

8. Select the **Submit** button.



An email will be sent to the e-mail address keyed in the transaction. The new user must follow the prompts in the e-mail to access the eServices portal.



RESENDING A LOGON ACCESS EMAIL

The logon access email is required for a user to logon for the first time.

To resend a logon access email:

1. Select the **More** tab from the *Business Account* profile.
2. Select the **Manage Logons** button.
3. Select the appropriate **Logon** hyperlink.
4. Select the **Resend Logon Access Email** hyperlink.
5. Select the **Yes** button.
6. Select the **OK** button.

MANAGING A USER'S ACCESS

To manage a user's access:

1. Select the **More** tab from the *Business Account* profile.
2. Select the **Manage Logons** button.
3. Select the appropriate **Logon** hyperlink.
4. Select the **Manage Access** hyperlink.
5. Select the **Access Type** hyperlink.
6. Update the Type of Access through the drop-down menu.
7. Select the **Save** button.



CANCELLING A USER'S ACCESS

Cancelling a user's access means cancelling the access to a specific business or account. Cancelling access does not remove the logon from the portal.

To cancel a user's access:

1. Select the **More** tab from the *Business Account* profile.
2. Select the **Manage Logons** button.
3. Select the appropriate **Logon** hyperlink.
4. Select the **Manage Access** hyperlink.
5. Select the **Cancel Access** hyperlink for the business or account you are cancelling the access for.
6. Select the **Save** button.

REINSTATING A USER'S ACCESS

To reinstate a user's access (or grant them access):

1. Select the **More** tab from the *Business Account* profile.
2. Select the **Manage Logons** button.
3. Select the appropriate **Logon** hyperlink.
4. Select the **Manage Access** hyperlink.
5. Select the **Grant Access** hyperlink.
6. Update the Type of Access through the drop-down menu.
7. Select the **Save** button.



DEACTIVATING A USER'S ACCESS

Deactivating a user's access means you are deactivating the user's logon so they will not be able to log into the portal.

To deactivate a user's access:

1. Select the **More** tab from the *Business Account* profile.
2. Select the **Manage Logons** button.
3. Select the appropriate **Logon** hyperlink.
4. Click the **Deactivate Access** hyperlink.
5. Click the **Yes** button.
6. Click the **OK** button.

REACTIVATING A USER'S ACCESS

To reactivate a user's access:

1. Select the **More** tab from the *Business Account* profile.
2. Select the **Manage Logons** button.
3. Select the appropriate **Logon** hyperlink.
4. Click the **Reactivate Access** hyperlink.
5. Click the **Yes** button.
6. Click the **OK** button.