Massachusetts Registry of Motor Vehicles

ATLAS

eServices Portal Administrators Help Documentation

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Contents

eServices Portal Administrator Functions

Each business with access to eServices Portal has a designated eServices Administrator. This administrator oversees adding and managing non-administrator logons for their business. Once a logon is added, system access can only be updated by the administrator or the RMV. There should be at least two eServices Administrators for each business.

If you have multiple accounts, they will be listed when you log into the eServices Portal. Under the "Who do you want to work with?" section, select the account for the business you are working with.

Do Not update the name on the profile of an administrator logon to a different user's name. This account was issued to the eServices Administrator who the access form was completed for. This is NOT a transferable web logon and is a violation of the Access Agreement.

Not all actions are available for each web logon. Actions will depend based on what the status is of the user's web logon.

Adding a Logon

eServices Administrators can give eServices Portal access for their business to their office staff.

STOP Only add web logons if you can certify the following:

1. **The end user is performing duties on behalf of this business.**
2. **A background check has been conducted on the end user, and there is no evidence of a felony conviction involving violence, dishonesty, deceit, or indecency. NOTE: This applies only to users that view Personally Identifiable Information (PII). This includes program users for Driving Schools, DVS, Insurance Agency, IPM and SDIP.**
3. **The end user will not access the eServices portal from outside the United States unless connected through a U.S. based VPN.**
4. **I will not create or use a generic ID for multiple users or for automated processes.**

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.
    - Sample Name field: Doe, John
4. Select the **Grant Access** button for the account(s) the user should have access to.
5. Select the **Access Level** for the account(s).
6. Select the **Next** button.
7. Select the **I Certify** button.

By selecting I Certify, you are confirming the user has been vetted & meets the guidelines outlined on the ATLAS page. Your business is responsible for the user's actions.

Users that do not have access to Personally Identifiable Information (PII) do not have to have a background check.

8. Select the **Submit** button. You will get a confirmation on the page with the confirmation number. An automated email will be sent to the email address of the user. The user must follow the prompts in the email.
9. Click OK to return to the More tab.

WARNING

- The automated email may end up in the user's junk/spam folder. Be sure they check there if it is not in their inbox. If it is not received after checking, you must contact RMVBusinessPartners@dot.state.ma.us

The user has 7 days to click on the link in the email they have been sent before the link expires. If the link expires, the user will be sent to the logon page. You will need to click on the Resend a Logon Access Email option.

Resending a Logon Access Email

If the user states they have not received the email notifying them of the new logon, this is the option needed to resend the email. This will also allow a user to bypass the Secret Question.

If a user has already updated their password, you will not see this option.

To resend a logon access email:

1. Select the **More** tab from the *Business Account* profile.
2. Select the **Manage My Logons** button.
3. Select the appropriate **Logon** hyperlink.
4. Select the **Resend Logon Access Email** hyperlink.
5. Select the **Yes** button to confirm you want to send a logon access email.
6. Select the **OK** button to the message notifying you the email has been sent.

WARNING

- The link in the email is only valid for **2 hours** from when it is sent.
- Notify the user to close all open RMV screens before clicking on the link in the automated email.
- The automated email may end up in the user's junk/spam folder. Be sure they check there if it is not in their inbox. If it is not received after checking, you must contact RMVBusinessPartners@dot.state.ma.us

Resetting a Logon password

If a user cannot use the 'Forget Password' option on the log on page, eServices Administrators will need to reset the password for the end user. Reset Password will not appear if the user never updated the password. The RMV will only reset passwords for eServices Administrators.

eServices Administrators will not be able to reset other eServices Administrators logons.

To reset a user's Logon Password:

1. Select the **More** tab from the *Business Account* profile.
2. Select the **Manage My Logons** button.
3. Select the appropriate **Logon** hyperlink.
4. Select on **Reset Password**
5. Select the **Yes** button.
6. Select the **OK** button.

WARNING

- The link in the email is only valid for **2 hours** from when it is sent.
- The link will enable a user to bypass the secret question. After they create a new password and log in, they can update their secret question by clicking on "Manage my profile" on the right side of the screen.
- Notify the user to close all open RMV screens before clicking on the link in the automated email.
- The automated email may end up in the user's junk/spam folder. Be sure they check there if it is not in their inbox. If it is not received after checking, you must contact RMVBusinessPartners@dot.state.ma.us

Change a User's Access Levels

After initially setting up a logon, you may decide to change the type of access or access level. The Type of Access changes are: Office Staff, Financial Staff and View. You cannot change any users to Administrators. If you need someone to be an administrator, an eServices Administrator Request form needs to be completed and sent to the RMV via the Community Portal.

eServices Administrators will not be able to update other eServices Administrators logons access levels; however, an eServices Administrator can manage their own access levels by going to the Manage My Profile hyperlink, More Tab and selecting Manage My Access button.

To update the Access Type for a logon:

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

   Or

1. Follow steps 1 -3.
2. Select the **Type of Access** hyperlink. (ex: Office Staff)
3. Select the **Type of Access** hyperlink again.
4. Update the **Type of Access** through the drop-down menu.
5. Select the **Save** button.

Managing a User's Account Access

After initially setting up a logon, you may need to update the web logons account and account level access. This is more common for businesses that may have access to multiple accounts, like IPM and DVS access. The account access levels vary by whatever program your business utilizes and what your business has been authorized for.

eServices Administrators will not be able to update other eServices Administrators logons access levels; however, an eServices Administrator can manage their own access levels by going to the Manage My Profile hyperlink, More Tab and selecting Manage My Access button.

To update the type of access and/or access levels for a logon:

1. Select the **More** tab from the *Business Account* profile.
2. Select the **Manage My Logons** button.
3. Select the appropriate **Logon** hyperlink.
4. Select the **Manage Account Access** hyperlink.
5. Click on the **Grant Access or Cancel Access** hyperlink for an account.

- Do not Click on the Cancel Access hyperlink under General Access or you will deactivate the web logon.

6. **<u>Cancel Access</u>** will ask if you are sure you want to cancel the user's access to the account. Click Yes.

   <u>Grant Access</u> will open a to **Type of Access.** Select Type of Access you want the user to have.

   Example: IPM and SDIP users will see: IPM Update, SDIP & IPM Update, SDIP Informal Inquiry, SDIP Informal Inquiry and Update, SDIP Informal Inquiry/IPM Update and View Only. DVS users will see Full Access or View Only.

7. Select the **Save** button.

   Or

1. Follow steps 1 -3.
2. Select the **Type of Access** hyperlink. (ex: Office Staff)
3. Select the **Type of Access** hyperlink again.
4. There are 3 actions.
   a. Update the **Type of Access** through the drop-down menu.
   b. Select **Grant Access** to an Account, then select Type of Access (Access Level) from the dropdown. Select **OK**.
   c. If User has access to an account already, you can update the Access Level by clicking on the Access Level hyperlink. Select from dropdown, then select **OK**.
   d. To remove access to an account, select **Suspend Access**.
5. 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. Deactivated logons will appear in light gray under your logon list.

eServices Administrators will not be able to deactivate other eServices Administrators logons; however, an eServices Administrator can deactivate their own logon by going to the Manage My Profile hyperlink, More Tab and selecting Delete My Profile button. If you need to deactivate an eServices Administrators web logon that is not your own, email RMVBusinessPartners@dot.state.ma.us.

To deactivate a user's access:

1. Select the **More** tab from the *Business Account* profile.
2. Select the **Manage My Logons** button.
3. Select the appropriate **Logon** hyperlink.
4. Select the **Deactivate Access** hyperlink.
5. Select the **Yes** button to confirm you want to deactivate the web logon.
6. Select the **OK** button.

Reactivating a User's Access

A user's web logon may have been deactivated for inactivity, by an eService Administrator or by the RMV. An eServices Administrator Request form needs to be completed and sent to the RMV via the Community Portal to reactivate an eServices Administrator. An eServices Administrator may send an email to rmvbusinesspartners@dot.state.ma.us asking to have the web logon reactivated. The email must come from the email address of the web logon and the user's name must be included.

To reactivate a user's access:

1. Select the **More** tab from the *Business Account* profile.
2. Select the **Manage My Logons** button.
3. Select the appropriate **Logon** hyperlink.
4. Select the **Reactivate Access** hyperlink.
5. Select the **Yes** button, to confirm you want to reactivate the access
6. Select the **OK** button.

7. An email is automatically sent to the user. If the user does not remember the password, go to the Reset Password.

If you go to 'Manage Web Logon' and the options are not available, you must contact RMVBusinessPartners@dot.state.ma.us to be instructed on how to get the Web Logon reactivated. You cannot reactivate another eServices Administrator's account.

Resetting Two-Step Authentication

The two-step authentication is the method used to get the security codes for each logon. There are three options: Authentication App, Text Message or Email.

To reset a user's two-step authentication:

1. Select the **More** tab from the *Business Account* profile.
2. Select the **Manage My Logons** button.
3. Select the appropriate **Logon** hyperlink.
4. Select the **Reset Two-Step Verification** hyperlink.
5. Select the **Yes** button, to confirm reset.
6. Select the **OK** button.

If a user is already logged into their logon, they can update their two-step settings by going to the Manage My Profile hyperlink.

Security Questions/Answers

A user may try the 'Forgot Password' option on the logon page, but the Security Answer is not working.

To guide a user to update the Security Question/Answer:

- Follow steps for resetting the password.
- Once the user updates their password, advise the user to:
    1. Select the **Manage My Profile** hyperlink located at the top right of page.
    2. Select the **Update Your Secret Question** hyperlink.

3. Use the dropdown to select the question
4. Type the answer and confirm the answer.
5. Select the **OK** button.

If a user is already logged into their logon, they can update their Secret Question/Answer by going to the Manage My Profile hyperlink.

Granting 3rd Party Access

This feature is only available to specific business partner users.

You may allow other businesses to have access to your account(s). To do this, the other business must already be established with the RMV and have a web logon assigned to each of their users.

To grant 3rd party access:

1. Select the **More** tab from the *Business Account* profile.
2. Select the **Grant 3rd Party Access** button.
3. Enter the e-mail address of the 3rd party end user. (If you get an error message saying the email address does not exist, the other business must add this user to their account and you can try again.)
4. Toggle to green on the **Grant Access** button. (Ensure you select only the needed Account Access.)
5. Assign the Access Level through the drop-down menu.
6. Select the **Next** button.
7. Select the **I Certify** button.
8. Select the **Submit** button.
9. An email will be sent to the user stating 3rd party access has been granted.

View & Manage 3rd Party Access

This feature is only available to specific business partner users.

If you have granted 3rd party access, you may want to remove or add additional accounts or types of access.

To manage 3rd party access:

1. Select the **More** tab from the *Business Account* profile.
2. Select the **View Grant 3rd Party Access** button.
3. Select the appropriate **Logon** hyperlink.
4. Select **Manage Account Access** to the right.
5. Select the **Cancel Access or Grant Access** button for each line item you wish to update.
6. Select the **Yes or Save** button.
7. Select the **OK** button.

By clicking on the General Access line, this will cancel the user's access to all your business accounts.

View Business Access

This feature is only available to specific business partner users.

This will give you a view of all the active and inactive web logons for your account(s).