



# EVR Scanning & Tagging Guidelines - Agents

The EVR Scanning and Tagging Guidelines identifies the documents that may be required for each transaction that can be processed by insurance agents on the EVR program along with the approximate tag (label) that should be used for those documents in your software. The exact name of the tag in your software may vary.



**Disclaimer:** The documents listed in the tables that follow represent the possible required documents for each transaction. Some of the documents listed may be required for every transaction of that type while others are common supporting documents that may or may not be required to be collected and scanned for a customer’s given scenario.



The footnotes below each table may help you determine when select documents are required, but for more detailed information on the required documentation refer to your EVR Reference Guides or the specific job aids associated with each transaction.

### Prior to processing any transactions on EVR:

1. **Always review your paperwork!** Ensure all documents are completed and signed. And that all information is correct and matches across your documents appropriately.
2. Write your first initial and full last name in the upper right-hand corner of RMV Applications being used for and scanned into the transaction (this includes the RTA, Duplicate Title Application, Duplicate Registration with Amendment Request Form, and Affidavit for Cancellation of Registration)
3. For all sale transactions,
  - ✓ **Make sure you have the physical Certificate of Origin or Title!** These documents are always required and a vehicle registration is NEVER allowed to be used in lieu of a title to process.
  - ✓ Review the chain of ownership on either the Certificate of Origin or Title as well as all corresponding assignments, the odometer reading, and VINs to make sure this information is complete and correct. Make sure you do not process any titles with a salvage brand or salvage title type. Refer to the [EVR Rules for Title Processing](#)<sup>1</sup> job aid for more information!

### After processing any transaction on EVR:

1. Print an extra copy of the RMV Fee receipt to include with the original documents that you must retain and store for the transaction.

**IMPORTANT:** Once a transaction is finalized, you can’t scan additional items to that transaction. If you need to add a document, immediately email [MassDOTEVRDEPT@dot.state.ma.us](mailto:MassDOTEVRDEPT@dot.state.ma.us) with all of the transaction documents bundled in one attachment.

### [Click the Name of the Transaction Below to See the Scanning Guidelines](#)

Private/Casual Sale .....	2
(Transaction Types: New Registration & Title, Plate Transfer, Plate Reactivation).....	2
Agents Processing a Dealer Sale .....	3
(Transaction Types: New Registration & Title, Plate Transfer, Plate Reactivation).....	3
Lease Buyout Processed By Agents.....	4
(Transaction Types: New Registration & Title, Plate Reassignment) .....	4
Registration Renewals.....	4
Title Only (Casual Sale).....	5
Title Only (Dealer Sale) .....	6
Surviving Spouse.....	7
Duplicate Title.....	8
Duplicate Registration .....	9
Registration Reinstatement .....	9
Registration Cancellation/Plate Cancel.....	9
Document Retention and Destruction FAQs .....	10

<sup>1</sup> <https://www.mass.gov/doc/evr-rules-for-title-processing/download>

## Private/Casual Sale

(Transaction Types: New Registration & Title, Plate Transfer, Plate Reactivation)

Approximate Software Tag:	For These Documents:
Registration and Title Application Completed	RTA (insurance stamped with required signatures)
Proof of Ownership (Certificate of Origin or Title)	Certificate of Title <sup>2</sup> The following supporting documents should be included with the proof of ownership if applicable: <ul style="list-style-type: none"> <li>• Notarized Affidavit for Correction</li> <li>• Lien Release for Previous Loan</li> <li>• Power of Attorney Paperwork</li> </ul>
Other	Proof of Book Value <sup>3</sup> Bill of Sale <sup>4</sup> Plate Inquiry <sup>5</sup> Secretary of the Commonwealth Verification <sup>6</sup> Massachusetts Driver's License, ID Card, or Permit <sup>7</sup> Out of State Driver's License <sup>8</sup> Probate Paperwork <a href="#">Reactivation Certification for EVR</a> <sup>9</sup> Affidavit of Surviving Spouse
Sales Tax Exemption Form	MVU-24 (Gift Exemption) MVU-26 (Family Transfer) MVU-27 (Inheritance Exemption) MVU-29 (Vehicles Purchased Outside of MA) MVU-33 (Disabled Exemptions) ST-7R or VIN Inquiry (Tax Previously Paid to MA Exemption) ST-2 Form (Tax Exempt Organizations)

<sup>2</sup> Must be an original document. On EVR, the physical Title is required for all casual sale transactions.

<sup>3</sup> Reminder: The Gross Sale Price for a casual sale is the higher of either the Clean-Trade in value from the JD Power website or the purchase price of the vehicle.

<sup>4</sup> Must be collected for out of state titles with no purchase price.

<sup>5</sup> Required to be scanned for all Plate Transfers and Plate Reactivations.

<sup>6</sup> Required for all business entities.

<sup>7</sup> Must be a copy of the front and back of the license; this can be in black and white or color.

<sup>8</sup> Must be a color copy of the front and back of the license.

<sup>9</sup> Required for all Plate Reactivation Transactions - <https://www.mass.gov/doc/reactivation-certification-for-evr/download>

## Agents Processing a Dealer Sale

(Transaction Types: New Registration & Title, Plate Transfer, Plate Reactivation)

Approximate Software Tag:	For These Documents:
Registration and Title Application Completed	RTA (with required signatures and that has been stamped for insurance)
Proof of Ownership (Certificate of Origin or Title)	Certificate of Origin <sup>10</sup> Certificate of Title <sup>10</sup>  The following supporting documents should be included with the proof of ownership if applicable: <ul style="list-style-type: none"> <li>• DRT-1</li> <li>• Notarized Affidavit for Correction</li> <li>• Lien Release for Previous Loan</li> <li>• Repossession Paperwork</li> <li>• Power of Attorney Paperwork</li> <li>• Any additional document that completes the chain of ownership (i.e., out of state reassignment forms)</li> </ul>
Purchase & Sales Agreement (or Other)	Purchase & Sales Agreement
Other	Massachusetts Driver's License, ID Card, or Permit <sup>11</sup> Out of State Driver's License <sup>12</sup> Proof of Trade (Copy of Title or Registration or an Inquiry of the vehicle) Plate Inquiry <sup>13</sup> Secretary of the Commonwealth Verification <sup>14</sup> Probate Paperwork <a href="#">Reactivation Certification for EVR</a> <sup>15</sup> Copy of Monroney label (window sticker) <sup>16</sup> Affidavit of Surviving Spouse <sup>17</sup>
Sales Tax Exemption Form	MVU-26 (Family Transfer) <sup>17</sup> MVU-27 (Inheritance Exemption) <sup>17</sup> MVU-33 (Disabled Exemptions) ST-2 Form (Tax Exempt Organizations)

<sup>10</sup> Must be original documents. On EVR, the physical C/O or Title is required for all dealer sale transactions.

<sup>11</sup> Must be a copy of the front and back of the license; this can be in black and white or color.

<sup>12</sup> Must collect a front and back, color copy of the driver's license for out of state drivers.

<sup>13</sup> Required to be scanned for all Plate Transfers and Plate Reactivations.

<sup>14</sup> Required for all business entities.

<sup>15</sup> Required for all Plate Reactivation Transactions - <https://www.mass.gov/doc/reactivation-certification-for-evr/download>

<sup>16</sup> Required for transactions processed for vehicle with a condition of New - <https://www.mass.gov/doc/how-to-identify-msrp-on-a-window-sticker/download>

<sup>17</sup> For dealer sales, the Affidavit of Surviving Spouse, MVU-26, and MVU-27 are only applicable to use as supporting documents to Proof of Trade for trade-in vehicles.

## Lease Buyout Processed By Agents

(Transaction Types: New Registration & Title, Plate Reassignment)

Approximate Software Tag:	For These Documents:
Registration and Title Application Completed	RTA (insurance stamped with required signatures) <sup>18</sup>
Proof of Ownership (Certificate of Origin or Title)	Certificate of Title <sup>19</sup> The following supporting documents should be included with the proof of ownership if applicable: <ul style="list-style-type: none"> <li>• Notarized Affidavit for Correction</li> <li>• Lien Release for Previous Loan</li> <li>• Power of Attorney Paperwork</li> </ul>
Other	Bill of Sale <sup>20</sup> Plate Inquiry <sup>21</sup> Secretary of the Commonwealth Verification <sup>22</sup> Massachusetts Driver's License, ID Card, or Permit <sup>23</sup> Out of State Driver's License <sup>24</sup> Probate Paperwork Affidavit of Surviving Spouse
Approval for Plate Reassignment	<a href="#">Request for License Plate Reassignment Form</a> <sup>25</sup>
Sales Tax Exemption Form	MVU-33 (Disabled Exemptions) ST-2 Form (Tax Exempt Organizations)

<sup>18</sup> The RTA Sales and Use Tax section is completed like a Dealer sale for a lease buyout; however the Authorized Dealer Signature can be left blank.

<sup>19</sup> Must be an original document. On EVR, the physical Title is required for lease buyouts and must be signed by both the buyer and the leasing company as the seller.

<sup>20</sup> Required for all lease buyouts and must be signed by the leasing company.

<sup>21</sup> Required to be scanned for all Plate Transfers and Plate Reactivations.

<sup>22</sup> Required for all business entities.

<sup>23</sup> Must be a copy of the front and back of the license; this can be in black and white or color.

<sup>24</sup> Must be a color copy of the front and back of the license.

<sup>25</sup> <https://www.mass.gov/doc/request-for-license-plate-reassignment/download>

## Title Only (Casual Sale)

Refer to the [EVR Title Only Policies Job Aid](#)<sup>26</sup> for more information on this transaction.

Approximate Software Tag:	For These Documents:
Registration and Title Application Completed	RTA (with required signatures) <sup>27</sup>
Proof of Ownership (Certificate of Origin or Title)	Certificate of Title <sup>28</sup> The following supporting documents should be included with the proof of ownership if applicable: <ul style="list-style-type: none"> <li>• DRT-1</li> <li>• Notarized Affidavit for Correction</li> <li>• Lien Release for Previous Loan</li> <li>• Repossession Paperwork</li> <li>• Power of Attorney Paperwork</li> </ul>
Other	Proof of Book Value Bill of Sale <sup>29</sup> Secretary of the Commonwealth Verification <sup>30</sup> Massachusetts Driver's License, ID Card, or Permit <sup>31</sup> Out of State Driver's License <sup>32</sup> Probate Paperwork Affidavit of Surviving Spouse
Sales Tax Exemption Form	MVU-24 (Gift Exemption) MVU-26 (Family Transfer) MVU-27 (Inheritance Exemption) MVU-29 (Vehicles Purchased Outside of MA) MVU-33 (Disabled Exemptions) ST7-R, Letter of Delivery, or VIN Inquiry (Tax Previously Paid to MA Exemption) ST-2 Form (Tax Exempt Organizations)

<sup>26</sup> <https://www.mass.gov/doc/evr-title-only-policies-job-aid/download>

<sup>27</sup> The RTA must NOT have an insurance stamp in order to process a Title Only transaction.

<sup>28</sup> Must be an original document. On EVR, the physical Title is required for all casual sale transactions.

<sup>29</sup> Must be collected for out of state titles with no purchase price.

<sup>30</sup> Required for all business entities.

<sup>31</sup> Must be a copy of the front and back of the license; this can be in black and white or color.

<sup>32</sup> Must be a color copy of the front and back of the license.



# EVR Scanning & Tagging Guidelines - Agents

## Title Only (Dealer Sale)

Refer to the [EVR Title Only Policies Job Aid](#)<sup>33</sup> for more information on this transaction.

Approximate Software Tag:	For These Documents:
Registration and Title Application Completed	Original RTA (with required signatures) <sup>34</sup>
Proof of Ownership (Certificate of Origin or Title)	Certificate of Origin <sup>35</sup> Certificate of Title <sup>35</sup>  The following supporting documents should be included with the proof of ownership if applicable: <ul style="list-style-type: none"> <li>• DRT-1</li> <li>• Notarized Affidavit for Correction</li> <li>• Lien Release for Previous Loan</li> <li>• Repossession Paperwork</li> <li>• Power of Attorney Paperwork</li> <li>• Any additional document that completes the chain of ownership (i.e., out of state reassignment forms)</li> </ul>
Purchase & Sales Agreement (or Other)	Purchase & Sales Agreement
Other	Massachusetts Driver's License, ID Card, or Permit <sup>36</sup> Out of State Driver's License <sup>37</sup> Proof of Trade <sup>38</sup> Secretary of the Commonwealth Verification <sup>39</sup> Probate Paperwork Copy of Monroney label (window sticker) <sup>40</sup> Affidavit of Surviving Spouse <sup>41</sup>
Sales Tax Exemption Form	MVU-26 (Family Transfer) <sup>41</sup> MVU-27 (Inheritance Exemption) <sup>41</sup> MVU-33 (Disabled Exemptions) ST-2 Form (Tax Exempt Organizations)

<sup>33</sup> <https://www.mass.gov/doc/evr-title-only-policies-job-aid/download>

<sup>34</sup> *The RTA must NOT have an insurance stamp in order to process a Title Only transaction.*

<sup>35</sup> *Must be original documents. On EVR, the physical C/O or Title is required for all dealer sale transactions.*

<sup>36</sup> *Must be a copy of the front and back of the license; this can be in black and white or color.*

<sup>37</sup> *Must be a color copy of the front and back of the license.*

<sup>38</sup> *Proof of Trade could be a copy of the title, a copy of the registration, or an Inquiry of the trade-in vehicle.*

<sup>39</sup> *Required for all business entities.*

<sup>40</sup> *Required for transactions processed for vehicle with a condition of New - <https://www.mass.gov/doc/how-to-identify-msrp-on-a-window-sticker/download>*

<sup>41</sup> *For dealer sales, the Affidavit of Surviving Spouse, the MVU-26, and MVU-27 are only applicable to use as supporting documents to Proof of Trade for trade-in vehicles.*

## Surviving Spouse

Refer to the [EVR Surviving Spouse Policies Job Aid](#)<sup>42</sup> for more information on this transaction.

Approximate Software Tag:	For These Documents:
Registration and Title Application Completed	Original RTA (with required signatures) <sup>43</sup>
Proof of Ownership (Certificate of Origin or Title)	Certificate of Title <sup>44</sup> The following supporting documents should be included with the proof of ownership if applicable: <ul style="list-style-type: none"> <li>• Notarized Affidavit for Correction</li> <li>• Lien Release for Previous Loan</li> <li>• Power of Attorney Paperwork</li> <li>• Any additional document that completes the chain of ownership (i.e., out of state reassignment forms)</li> </ul>
Sales Tax Exemption form (or Other)	<a href="#">Affidavit of Surviving Spouse</a> <sup>45</sup>
Other	Copy of Death Certificate <sup>46</sup> Vehicle Inquiry <sup>46</sup> Massachusetts Driver's License, ID Card, or Permit <sup>47</sup> Out of State Driver's License <sup>48</sup> Power of Attorney Paperwork

<sup>42</sup> <https://www.mass.gov/doc/evr-surviving-spouse-policies-job-aid/download>

<sup>43</sup> The RTA must NOT have an insurance stamp in order to process a title only Surviving Spouse transaction. Insurance stamp is required when registering the vehicle during the Surviving Spouse transaction.

<sup>44</sup> Must be original documents. On EVR, the physical Title is required for all Surviving Spouse transactions.

<sup>45</sup> <https://www.mass.gov/doc/affidavit-of-surviving-spouse/download> - This can be electronically signed.

<sup>46</sup> Required to be scanned for all Surviving Spouse transactions.

<sup>47</sup> Must be a copy of the front and back of the license; this can be in black and white or color.

<sup>48</sup> Must be a color copy of the front and back of the license.



## Duplicate Title

Refer to the [EVR Duplicate Title Policies Job Aid](#)<sup>49</sup> for more information on when the documents below are required.

Approximate Software Tag:	For These Documents:
Application for Duplicate Certificate of Title	<a href="#">Duplicate Title Application</a> <sup>50</sup>
Other	<p>Title Inquiry<sup>51</sup></p> <p>The following supporting documents should be included with the transaction if applicable:</p> <ul style="list-style-type: none"> <li>• Previous Certificate of Title (with any attached supporting documents)</li> <li>• DRT-1</li> <li>• Power of Attorney Paperwork</li> <li>• Probate Paperwork</li> <li>• Affidavit of Surviving Spouse with copy of deceased owner's Death Certificate</li> <li>• Photocopy of driver's license or MA ID of individual owner(s) or business representative<sup>52</sup></li> <li>• Photocopy of driver's license or MA ID of Surviving Spouse<sup>52</sup></li> <li>• Photocopy of driver's license or state-issued ID for Personal Representative(s)<sup>52</sup></li> <li>• Photocopy of driver's license or state-issued ID for Power(s) of Attorney<sup>52</sup></li> </ul>

<sup>49</sup> <https://www.mass.gov/doc/evr-duplicate-title-policies-job-aid/download>

<sup>50</sup> <https://www.mass.gov/doc/application-for-duplicate-certificate-of-title/download>

<sup>51</sup> Required for ALL Duplicate Title transactions.

<sup>52</sup> May be required when alternate title mailing address functionality is used during the transaction. Must be unexpired. Out of country licenses are not acceptable. Out of state licenses must be front and back, color photocopies. Please review the [Revised Duplicate Title policy](#) for full details of when each is required. <https://www.mass.gov/doc/revised-duplicate-title-policy-for-evr/download>



## Duplicate Registration

Refer to the [EVR Duplicate Registration Policies Job Aid](#)<sup>53</sup> for more information on when the documents below are required.

Approximate Software Tag:	For These Documents:
Other	<a href="#">EVR Duplicate Registration with Amendment Request Form</a> <sup>54</sup>

## Registration Renewals

Not all Registration Renewals require scanned documents.

Approximate Software Tag:	For These Documents:
Registration and Title Application Completed	RTA (insurance stamped with required signatures) <sup>55</sup> RMV-2 <sup>55</sup>
2290 – Heavy Vehicle Use Tax (or Other)	2290 Heavy Vehicle Use Tax Form <sup>56</sup>

## Registration Reinstatement

There are no documents that must be scanned during a Registration Reinstatement.

## Registration Cancellation/Plate Cancel

There are no documents that must be scanned during a Registration Cancellation, however the following documents must be collected and retained on-site at your location for 2 years:

- The [Affidavit for Cancellation of Registration](#)<sup>57</sup>
- Plate Inquiry
- A copy of the Plate Return Receipt

<sup>53</sup> <https://www.mass.gov/doc/evr-duplicate-registration-policies-job-aid/download>

<sup>54</sup> <https://www.mass.gov/doc/duplicate-registration-with-amendment-request-form/download> - Always required when processing a duplicate with amended information.

<sup>55</sup> If an amendment is being made during renewal or if an insurance stamp is required to renew, either an RTA or RMV-2 is required.

<sup>56</sup> Required at every renewal for commercial vehicles with a Registered Weight of 55,000 lbs. or more.

<sup>57</sup> <https://www.mass.gov/doc/affidavit-for-cancellation-of-registration-0/download>

## Document Retention and Destruction FAQs

**Question:** How long do we need to retain copies of documents for?

- **Answer:** The Permit Holder must securely retain the originals of the scanned documents for at least 90 calendar days. The Permit Holder must retain backup copies of the original documents and paperwork in either a hardcopy or electronic format for 5 years.

**Question:** Are there any rules for how we store the backup copies of the original documents?

- **Answer:** Electronic backup copies can be maintained by the Service Provider on the behalf of the Permit Holder and must be available for RMV inspection upon request. If physical copies of the documents are retained, they do not need be retained on-site at the Permit Holder location but must be available for RMV inspection within 24 hours of such a request

**Question:** Do the documents need to be shredded on the 90<sup>th</sup> day exactly?

- **Answer:** Once the Permit Holder has received instructions to dispose of the original documents, the Permit Holder must, within 30 calendar days, dispose of these documents in a manner that meets the requirements of MGL Chapter 93i §2. Once the documents are placed in the locked shredding bin, they can be considered destroyed. Documents should be memorialized in the locked shredding bin by the 120<sup>th</sup> day of retention at the latest.

**Question:** What are the shredding requirements for the documents?

- **Answer:** The Permit Holder must use the services of a company that specializes in document destruction. The Permit Holder is not allowed to shred their own documents and the documents cannot be transported offsite by the Permit Holder to a shredding company.

**Question:** Do we need a receipt from the shredding company after the documents have been destroyed?

- **Answer:** Yes. The Permit Holder must retain a receipt from the destruction company that indicates the number of transactions that were destroyed, the to/from dates of the transaction (the date of the earliest transaction to the date of the most recent one), and the date on which the documents were destroyed. This receipt must be retained for audit purposes for at least 1 year.

**Question:** How will I know when the documents are eligible for destruction?

- **Answer:** After the 90 days has passed on a periodic basis that will vary by the quantity of processed transactions; the Permit Holder will initiate and the Service Provider will pull the Document Destruction Details to indicate which documents are eligible to be destroyed. This message will be by Permit Holder location and will return the last date documents were destroyed and the current “up to” date of documents that are eligible for destruction.

**Question:** How do I indicate to the RMV that the documents have been destroyed?

- **Answer:** Once the records are destroyed, the Permit Holder will memorialize this by initiating the Service Providers version of the Document Destruction transaction that will forward the “from/to dates” of the documents that have been destroyed to the RMV. The steps for how to process this should be included in your Service Provider’s software training.