



Massachusetts Registry of Motor Vehicles ATLAS

Insurance Policy Management (IPM – Formerly UMS) eServices Portal Help Documentation

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Table of Contents

General eServices Portal Help.....	3
Logging on to the eServices Portal.....	3
Logging Off the eServices Portal	4
Resetting a Forgotten Password	4
Updating Your Personal Profile Information	5
Updating a Password	5
Viewing Other Business Account Profiles	6
Viewing Submissions.....	6
Viewing Letters	7
Managing Payment Channels	8
Insurance Policy Management Functions.....	10
Searching by Vehicle Information.....	10
Searching by Individual Information.....	11
Searching by Business Information.....	12
Notice to Carrier Report.....	14
Adding an Insurance Policy	15
Amending an Unpaid Premium.....	19
Clearing an Unpaid Premium	20
Reinstating an Insurance Policy	21
NADA Vehicle Inquiries	23
Update Vehicle Address.....	24
Cancel Registration	25
eServices Portal Administrator Functions.....	26
eServices Administrator Functions	26
Adding a Logon	26
Resending a Logon Access Email.....	27
Managing a User's Access	27
Cancelling a User's Access	28
Reinstating a User's Access.....	28
Deactivating a User's Access.....	29
Reactivating a User's Access	29



Granting 3 rd Party Access	30
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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**.



INSURANCE POLICY MANAGEMENT FUNCTIONS

SEARCHING BY VEHICLE INFORMATION

To search by vehicle information:

1. From the *Business Account* profile, select the **Search for a Vehicle** hyperlink.
2. Enter the search criteria.



Searching for a vehicle can be done using the Plate Number, VIN, or last 8 characters of the VIN.

3. Select the **Search** button, or the **Enter** key on your keyboard.



Use the Search Help hyperlink for search tips.



SEARCHING BY INDIVIDUAL INFORMATION

To search by individual information:

1. From the *Business Account* profile, select the **Search for an Individual** hyperlink.
2. Enter the search criteria.



Searching for an individual can be done with the name, name and birthdate, address, or individual identification number.

3. Select the **Search** button, or the **Enter** key on your keyboard.



Use the [Search Help](#) hyperlink for search tips



SEARCHING BY BUSINESS INFORMATION

To search by business information:

1. From the *Business Account* profile, select the **Search for a Business** hyperlink.
2. Enter the search criteria.



Searching for a business can be done using the Business Name or Federal Identification Number.

3. Select the **Search** button, or the **Enter** key on your keyboard.



Use the Search Help hyperlink for search tips.



SEARCHING BY POLICY INFORMATION

To search by policy information:

- From the *Business Account* profile, select the **Search for a Policy** hyperlink.
- Enter the required fields.



All four fields must be entered in order to execute the search.

- Select the **Search** button, or the **Enter** key on your keyboard.



Use the Search Help hyperlink for search tips.



NOTICE TO CARRIER REPORT

The Notice to Carrier report lets users know when a policy was not reported for a vehicle, if a policy has expired, if a registration's status has changed, and much more. The Notice to Carrier report is accessible from the *Business Account* profile for Insurance Carrier businesses. To access the report:

1. Click the **Notice to Carrier** hyperlink from the *Business Account* profile of an Insurance Carrier business.
2. Select the tab or sub-tab you wish to view.
3. Select the **VIN** hyperlink to view a *Vehicle* profile for a vehicle listed in the report.
4. Select the **Policy Number** or **Policy Term Date** hyperlink to view the policy or a specific term for the policy.



Click the **Export** hyperlink to export a sub-tab of report data to a spreadsheet.

5. Click the **Back Arrow** icon to return to the *Business Account* profile.



ADDING AN INSURANCE POLICY

To add an insurance policy:

1. Navigate to the appropriate *Vehicle* or *Section 5 Account* profile.
2. Under the *I Want To* panel, click the **Add Insurance Policy** hyperlink.
3. Click **Next**.
4. Enter the required information.
 - a. Additional vehicles or section 5 accounts can be added to the policy using the **Add A Vehicle** an **Add an Account** hyperlink.
 - b. If the vehicle owner is the policyholder, click the **Policy Holder** button next to the owner's name. If not, answer the prompts to add policyholder information.
 - c. To bind the policy, click the **Bind Policy** button.
5. Click **Next**.
6. Click **I Accept**.
7. Click **Submit**.
8. Click **OK**.



BIND VERIFICATION

To perform the bind verification for an insurance policy:

1. Navigate to the appropriate *Vehicle* profile or policyholder's *Individual* or *Business* profile.
2. Click the **Insurance** tab.
 - a. The **Policy Number** for a bound policy will be a system-generated ID starting with the number symbol (#) followed by fifteen digits.
3. Click the **Maintain** hyperlink for the desired policy number.
4. Click the **Bind Verification** hyperlink.
5. Click **Next**.
6. Enter the **Policy Number**.
7. Click **Next**.
8. Click **I Accept**.
9. Click **Submit**.
10. Click **OK**.



AMENDING AN INSURANCE POLICY

To amend an insurance policy:

11. Navigate to the appropriate *Vehicle* profile or policyholder's *Individual* or *Business* profile.
12. Click the **Insurance** tab.
13. Click the **Maintain** hyperlink for the desired policy number.



If the Maintain hyperlink is not available, make sure the Company Code on the policy matches your CAR Code. If it does, you may be working under the wrong Business Account.

14. Select the **Amend** hyperlink.
15. Click **Next**.
16. Select the **Vehicle Action Code** for the amendment you wish to perform.
17. Click **Next**.
18. Update the appropriate information.
19. Click **Next**.
20. Click **I Accept**.
21. Click **Submit**.
22. Click **OK**.



CANCELLING AN INSURANCE POLICY

To cancel an insurance policy:

1. Navigate to the appropriate *Vehicle* profile or policyholder's *Individual* or *Business* profile.
2. Click the **Insurance** tab.
3. Click the **Maintain** hyperlink for the desired policy number.
4. Select the **Cancellation** hyperlink.
5. Click **Next**.
6. Select the **Cancellation Reason**.
7. Click **Next**.
8. Enter the required information.
9. Click **Next**.
10. Click **I Accept**.
11. Click **Submit**.
12. Click **OK**.



The policy will display in gray text on the Insurance tab and will only be visible if “Show History” is selected on the tab.



AMENDING AN UNPAID PREMIUM

To amend an unpaid premium amount on an insurance policy:

1. Navigate to the appropriate *Vehicle* profile or policyholder's *Individual* or *Business* profile.
2. Click the **Insurance** tab.
3. Click the **Maintain** hyperlink for the desired policy number.
4. Select the **Clear/Amend Unpaid Premium** hyperlink.
5. Click **Next**.
6. Select the **Reason** of *Premiums Were Adjusted*.
7. Click **Next**.
8. Update the **Unpaid Premium Owed** amount.
 - a. **Note:** You cannot clear this amount or enter zero (0) if the **Reason** is *Premiums Were Adjusted*. To clear the amount, update the **Reason** on the previous screen.
9. Click **Next**.
10. Click **I Accept**.
11. Click **Submit**.
12. Click **OK**.



CLEARING AN UNPAID PREMIUM

To clear an unpaid premium amount on an insurance policy:

1. Navigate to the appropriate *Vehicle* profile or policyholder's *Individual* or *Business* profile.
2. Click the **Insurance** tab.
3. Click the **Maintain** hyperlink for the desired policy number.
4. Select the **Clear/Amend Unpaid Premium** hyperlink.
5. Click **Next**.
6. Select the **Reason** of *Unpaid Premium Paid* or *Unpaid Premium Posted in Error*.
7. Click **Next**.
 - a. **Note:** The Unpaid Premium Owed field will be zero (0). If you wish to amend the amount instead of clear it, change the **Reason** to *Premiums Were Adjusted* on the previous screen.
8. Click **Next**.
9. Click **I Accept**.
10. Click **Submit**.



Clearing an unpaid premium will not reinstate the policy. To reinstate, perform the Reinstatement maintenance transaction.



REINSTATING AN INSURANCE POLICY

To reinstate an insurance policy:

11. Navigate to the appropriate *Vehicle* profile or policyholder's *Individual* or *Business* profile.
12. Click the **Insurance** tab.
13. Click the **Maintain** hyperlink for the desired policy number.
14. Select the **Reinstatement** hyperlink.
15. Click **Next**.
16. Select the **Reinstatement Reason**.
17. Click **Next**.
 - a. **Note:** If you are reinstating due to a resolved unpaid premium, the unpaid premium amount cannot be updated from this transaction. You must complete the Clear/Amend Unpaid Premium transaction to clear the amount.
18. Click **Next**.
19. Click **I Accept**.
20. Click **Submit**.
21. Click **OK**.



RENEWING AN INSURANCE POLICY

To renew an insurance policy:

1. Navigate to the appropriate *Vehicle* profile or policyholder's *Individual* or *Business* profile.
2. Click the **Insurance** tab.
3. Click the **Maintain** hyperlink for the desired policy number.
4. Select the **Renewal** hyperlink.
5. Click the **Next** button.
6. Enter the **Policy Expiration Date**.
7. Click the **Next** button.
8. Click the **I Accept** button.
9. Click the **Submit** button.
10. Click **OK**.



NADA VEHICLE INQUIRIES

NADA Vehicle Inquiries are ran to retrieve the mileage-adjusted clean trade-in value. To run a NADA Vehicle Inquiry:

1. Select the **NADA Vehicle Inquiry** hyperlink from the Insurance Carrier or Agency *Business Account* profile.
2. Key the entire VIN and odometer mileage. Click the **Next** button.



If no vehicle is found and the VIN was entered correctly, cancel the inquiry.

3. Select the vehicle trim. Click the **Next** button.
4. The *Summary* window lists inquiry results. To receiving an email of the summary, click the **Submit** button.
5. Select the **OK** button to return to the *Business Account* profile.



UPDATE VEHICLE ADDRESS

To update a vehicle garaging address as a courtesy for a customer:

1. Access the *Vehicle* profile.
2. Click the **Update Vehicle Address** hyperlink.
3. Click **Next**.
4. Enter the address information in the appropriate fields.
5. Click **Next**.
6. If the address does not verify with USPS or you wish to use the address as you keyed it, click the **Use Original Address** hyperlink.
7. Click **Next**.
8. Click **I Accept**.
9. Click **Submit**.



CANCEL REGISTRATION

To cancel a vehicle registration as a courtesy for a customer:

1. Access the *Vehicle* profile.
2. Click the **Cancel Registration** hyperlink.
3. Click **Next**.
4. Click **I Accept**.
5. Click **Next**.
6. Click **I Accept**.
7. Click **Submit**.



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.



GRANTING 3RD PARTY ACCESS

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.
4. Select the **Grant Access** button.
5. Assign the Type of Access through the drop-down menu.
6. Select the **Next** button.
7. Select the **I Agree** button.



By selecting **I Agree**, you and your company are confirming the user has been vetted and meets requirements outlined in your access agreement. Your company is responsible for the actions of this user.

8. Select the **Submit** button.