



Massachusetts Registry of Motor Vehicles

ATLAS

**Safe Driver Insurance Plane (SDIP) 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**.



SDIP FUNCTIONS

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

4. Select the **Name** hyperlink to access the *Individual* profile.



VIEWING INDIVIDUAL INFORMATION

The *Individual* and *Demographics* panels displays the customer's license information and demographic information.

The *I Want To* panel lists actions that can be taken on the individual.

On the *Individual* profile, a variety of tabs are available depending on the user's access, including:

- The **SDIP** tab displays formal inquires that have been added, any insurance claims the customer has, and any out of state incidents that have occurred, all of which are organized on individual sub-tabs.
- The **Licensing** tab displays statuses and certificates, license history, placard history, restrictions, and endorsements that the customer may have, all of which are organized on individual sub-tabs.
- The **Vehicles** tab lists vehicles the customer owns and policies the customer holds.
- The **Enforcements** tab displays surchargeable incidents and citations.
- The **Other** tab displays name and address history for the customer.



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 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.



RUN AN INFORMAL INQUIRES

To run an informal inquiry:

1. Access the *Individual* profile for the appropriate customer.
2. Click the **Run an Informal Inquiry** hyperlink in the *I Want To* panel.
3. Enter the required information.
4. If applicable, select the **Yes** button for Unreported OOS Incidents.
 - a. Note: To add additional operators, click the **Add Another Operator** hyperlink.
5. Click the **Inquire** button.
6. The customer's SDIP rating, along with the incidents on their record that influence their score, is displayed.
 - a. Note: To update information on the inquiry, click the Return to Inquiry button.
7. Click the **OK** button to navigate back to the *Individual* profile.



ADD A FORMAL INQUIRY

To run a formal inquiry:

1. Access the *Individual* profile for the appropriate customer.
2. Click the **Add a Formal Inquiry** hyperlink in the *I Want To* panel.
3. Change the transaction by clicking **the Transaction Type** drop-down menu and selecting another option, if applicable.
4. Fill in the required policy information fields.
5. If applicable, select the **Yes** button for Unreported OOS Incidents.
 - a. Note: To add additional operators, click the **Add Another Operator** hyperlink.
6. Click the **Next** button.
7. A summary of the entered information is displayed. Click the **Submit** button.
8. The inquiry information is displayed for the company. Click the **Close** button to navigate back to the *Individual* profile.



UPDATE A FORMAL INQUIRY

To update a formal inquiry:

1. Access the *Individual* profile for the appropriate customer.
2. View the **SDIP** tab and click the **Inquiries** sub-tab.
3. Click the **Policy Number** hyperlink.
4. Depending on the desired action:
 - a. The **Update/Renew Policy** button is used to update information for the inquiry. This action is not used for fixing information; in that case the policy should be cancelled, and a new inquiry added.
 - b. The **Cancel Policy** button is used to cancel a policy.
5. Click the **Submit** button after the necessary input/action is completed.



ADD AN INSURANCE CLAIM

To add an insurance claim:

1. Access the *Individual* profile for the appropriate customer.
2. Click the **Add an Insurance Claim** hyperlink in the *I Want To* panel.
3. Select the **Type of Loss** from the drop-down menu.
 - a. Note: Depending on the loss, additional fields may be required.
4. Fill in all required fields.
 - a. Note: If policy information is required, and the operator and policyholder is the same, click the **Operator is Policyholder** button to populate the fields.
5. Click the **Next** button.
6. A summary of the entered information is displayed. Click the **Submit** button.
7. Click the **OK** button to navigate back to the *Individual* profile.



UPDATE AN INSURANCE CLAIM

To update an insurance claim:

1. Access the *Individual* profile for the appropriate customer.
2. View the **SDIP** tab and click the **Claims** sub-tab.
3. Click the **Policy Number** hyperlink.
4. Depending on the desired action:
 - a. The **Change Loss Amount** button is used to amend the loss amount.
 - b. The **Change Non Key Data** button is used to amend information that would not affect the SDIP.
 - c. The **Reverse Claim** button is used to reverse the claim.
5. Click the **Submit** button after the necessary input/action is completed.



ADD AN OUT OF STATE INCIDENT

To add an out of state incident:

1. Access the *Individual* profile for the appropriate customer.
2. Click the **Add an Out of State Incident** hyperlink in the *I Want To* panel.
3. Enter in required incident information fields.
4. Enter the prior license number and state if the customer held an out of state license at the time of the incident, if applicable.
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 *Individual* profile.



UPDATE AN OUT OF STATE INCIDENT

To update an out of state incident:

1. Access the *Individual* profile for the appropriate customer.
2. View the **SDIP** tab and click the **OOS Incidents** sub-tab.
3. Click the **Offense Code** hyperlink.
4. Depending on the desired action:
 - a. The **Amend Incident** button is used to change the incident information.
 - b. The **Reverse Incident** button is used to reverse an incident added in-error. A reversal reason must be entered.
5. Click the **Submit** button after the necessary input/action is completed.



NOTICE TO RE-INQUIRE

To view the Notice to Re-inquire report:

1. Click the **Notice to Re-inquire** hyperlink from the *Business Account* profile for the account.
 - Re-inquiry notices display.



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.



E SERVICES PORTAL ADMINISTRATOR FUNCTIONS

E SERVICES 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.