

## County Clerk Practice Scenarios

Follow these scenarios using the data provided to practice KAVIS Boat functionality. Anything done in the practice environment (UAT) doesn't impact Production (real data).

**UAT Practice Site:** <https://kavis-uat.kytc.ky.gov/>

Contact us at [kavis@ky.gov](mailto:kavis@ky.gov) for the KAVIS team to supply you with your specific county's data to use with these scenarios (customer and title numbers). If the data given has a PVA issue and you cannot complete the scenario, use another Customer or title number.

### A. Kentucky Transfer

In this scenario you will be performing a KY Transfer from one individual to another. Along with paying delinquent taxes, issuing a valid state issued HIN, adding a registration, pending/filing a lien, placing the application on hold, and successfully checking out a Title Application.

1. Starting with the **Customer Search** tile, use a **Customer Name** from the data sheet provided to proceed to their **Customer Account** page.
2. Once on the **Customer Account** page, select the blue **Title** button from a vehicle tile, and choose **Kentucky Transfer** from the dropdown menu.
3. KAVIS navigates to Step 2 of the Title Application- **Vehicle Information**.
4. If the vehicle has delinquent taxes, a warning message at the top of the screen will appear.

"Delinquent taxes are owed on this vehicle. Click [here](#) to view and pay your delinquent taxes for this vehicle. You can continue past this step, but delinquent taxes must be paid in the amount of **\$42.65** to complete this transaction."

- a. To pay delinquent taxes, select the hyperlink on the word "[here](#)" to continue to the **Manage Ad Val** page.
- b. Select the **Pay with Application** button to pay delinquent taxes with the Title Application.

NOTE: A user can select the **Pay Now** button to pay for the delinquent taxes in a separate transaction from the Title Action being performed. By selecting **Pay Now**, KAVIS will navigate to the shopping cart, saving your place in the Title Application. Once you finalize the transaction, select the **Vehicle Information** bubble at the top of the page to continue with the **KY Transfer**.

5. On the **Vehicle Information** page, choose your county for the **County of Dockage** and fill in any missing information.



6. Select **Continue**.
  - a. If KAVIS has detected a missing or invalid HIN, choose the checkbox to request a state-issued HIN.
7. On the **Seller Information** page, add the **Seller Notary Date**.
  - a. KAVIS provides an option to select **Seller is Buyer** in cases where the Owner will remain on the new title.
  - b. Select **Continue** to continue to the **Buyer Information** page.
8. On the **Buyer Information** page, select **Add a Buyer**.
9. Use a **Customer Name** from the data sheet provided.
  - a. If a Buyer has a  next to their name, their account has missing information. Select the icon and input any missing information.
  - b. You may also click the  to remove buyers.
  - c. If you add more than 1 buyer, select the Ownership Connector Dropdown and use the blue arrow to change Primary Buyer.
  - d. If the Buyer does not have Delinquencies, continue with step 10.
    - o If the buyer owes ad valorem, there will be a **Yes** in the Delinquency column. Click the **\$ Pay All** button. KAVIS will navigate to the **Manage Ad Valorem** page.

Note: You may deselect the checkbox next to the current year's Ad Val taxes, but all delinquent ad val must be paid either separately or with the application fees in order to process the application.
    - o Select **Pay With Application**.
    - o KAVIS navigates back to the Title Application, on the **Buyer Information** step.
10. Enter a **Buyer Notary Date** (required) and click **Continue**.
11. This will take you to the Lien Information Page, select **Add Lien**.
  - a. Choose **Pending**.
  - b. Create the **Lienholder Name**, **uncheck** the checkbox next to 'Charge Lien Filing Fee' and click **Add**.
    - o Click the **blue arrow** next to the Lienholder's name, this is where you may edit the lien information or remove them from the application.
  - c. Click **Continue**.
12. If the Registration is expired, click **Add Registration**, then **Add** and **Continue**.
13. On the Purchase Information page, create the required information:
  - a. Speed Titles are Not an Option for Boats, ignore the checkbox.
  - b. Enter a **Date of Purchase** and **Purchase Price**.
  - c. In the Use Tax Description dropdown, select **Transfer from Individual to Individual**.
  - d. Click **Continue**.
14. On the Finalize Title Application page, if all lines are green, continue with Step 12.
  - a. If your Vehicle Information bubble is red, it is most likely needing either a Situs Address or the County of Dockage corrected. Click the **red bubble** to return to the page and create the missing information.
15. Click the **Finalize** bubble, if all lines are green, click the **Print Preview** button at the bottom of the page.
  - a. This will create a title application filled out with the information entered.



This is just a convenience, in real life, if a Customer has an application already filled out, you may still use it.

- b. Scroll to the bottom, click **Add to Cart** and **complete the transaction**.
16. If you are not taken to the Transaction Summary Page after Checkout, click the '**Recall Last Transaction**' button at the top of the page.
  - a. This will have the new Title # (and HIN # if requested).
  - b. Click the **Title #** in the middle of the screen and go to the Vehicle Summary Page.
17. Stay on this Vehicle Summary Page and continue to the next scenario.

## B. Filing a Pended Lien

During this Scenario you will file a pended a Lien from the Vehicle Summary Page.

1. On the Vehicle Summary Page from the previous title application scenario, scroll down to the Lien Information section
  - a. Click **View** next to a Pending lien that was added during the application process.
2. Click **Edit** and change the lien status from Pending to **Filed**.
  - a. Notice this is also where you can delete the lien if necessary.
  - b. Create the information, check the checkbox next to '**Charge Lien Filing Fee**' and click **Save**.
  - c. Then click **Add to Cart** and checkout the transaction.

## C. Issuing a New Title: Out-of-State

1. Using a **Customer Name** from either data list, go to the Customer's Account Page.
2. On the Customer Account Page, click the green **New Title** button.
  - a. KAVIS will navigate to the Title Application Process.
3. On the Title Information page, select **Out of State Transfer** from the Title Action dropdown menu.
  - a. Select the **Move-In** checkbox and enter the **Move-In Date**.
  - b. Select **Alabama** from the Titling State dropdown, and click **Continue**.
4. On the Vehicle Information Page, create the vehicle information however you like.
  - a. Because the boat does not have a valid HIN, enter a couple numbers and click or tab off the box. This will allow you to **check the 'Request State-Issued HIN' checkbox**.
  - b. Click **Add Motor**, create the information, and click **Continue**.
5. Since Move-In was selected, the Seller Information is not required, click **Continue**.
6. On the Buyer Information page, the customer whose account we started with has been saved as a Buyer. Click **Add a Buyer** and add at least 1 more Buyer from the either data list.
  - a. If a buyer has a  next to their name, their account is missing required information, click the flag icon and create any missing information.
    - o You may also click the red x next to their name and choose another customer from your data list.
  - b. If no Buyers have Delinquencies, continue with step e.
  - c. If a Buyer owes ad valorem, there will be a **Yes** in the Delinquency column.  
Click the **\$ Pay All** button.



- If you have multiple Buyers owing ad valorem, deselect the checkbox next to 1 of the Customer's name and choose **'Pay Now'**. **Checkout** the Customer, this will allow you to pay for the customer separately from the application fees.
- d. Click on the **Buyer Information** bubble at the top of the page if you are not brought back to the application.
  - If another Buyer owes ad valorem, select the **\$ Pay All** button again and choose 'Pay with Application'.
  - e. Choose **'OR'** for the Ownership Connector.
  - f. Click the **blue** arrow to switch the positions of the owners on the title.
  - g. Enter a **Notary Date** and click **Continue**.
- 7. We will not add a lien, click **Continue**.
- 8. On the Registration Page, click **Add Registration**, then **Add**.
  - a. Click **Remove** to remove the registration from the application, then **Continue**.
- 9. On the Purchase Information Page, select **yes** for an Extra Review by MVL.
  - a. Choose an extra review reason, enter a comment, and click **Continue**.
- 10. On the Finalize Page, write down 1 of the Buyer's name and click **'Place On Hold'**.
  - a. This is in case the Title Application cannot be completed. It will be saved to their Customer Account Pages for 60 days, after which it will be deleted.
- 11. Using the name you wrote down, go to that **Buyer's Customer Account Page**.
  - a. Near the top you will see a new section, 'Title Applications On Hold'.
  - b. Click **'Resume'** to be taken back to the Title Application Process.
- 12. If any line or bubble is red, make the necessary corrections. Otherwise, click on the **Finalize** bubble.
  - a. If all lines are green, select the **checkboxes** acknowledging there is no lien or registration being added to this application.
  - b. Click **Add to Cart** and complete the transaction.
- 13. If you are not taken to the Transaction Summary Page after Checkout, click the **'Recall Last Transaction'** button at the top of the page.
  - a. This will have the new Title # and HIN #.

## D. Cancel a Registration

1. Choose a Customer from the data list and go to their Customer Account Page.
2. Select a vehicle that does not have PVA issues and has a blue R icon, meaning the registration is ready for renewal.
  - a. In the **Manage** dropdown of that vehicle's tile, select **Sold Out of State**.
  - b. If the vehicle has a pending or filed lien, choose another vehicle.
3. Using the Add Duplicate dropdown, select **Print, No Decal with Fee**.
4. In the Reason dropdown, change Sold Out of State to **Junk**.
  - a. Notice the Title section to the left has been updated to 'Surrendered-Junked'.
5. Click **Add to Cart**.
  - a. In the Shopping Cart, click on the **blue Customer ID Number** under their name.
    - This will take you to the Customer Account Page. In the vehicle's tile, hover over the red shopping cart icon to see what is in the shopping cart specific to that vehicle.
    - If there is Ad Valorem in the Shopping Cart, the **\$** will now be **\$**.
6. Return to the Shopping Cart by clicking on the icon at the top of the screen and finish checking out the customer.



## E. Single Ad Valorem Payment

In the scenario, you will perform a single Ad Valorem payment and waive the penalty and interest fees.

1. From a **Customer Account** page, choose a vehicle with no PVA issues, that also has Ad Valorem due (there will be a \$ icon in the vehicle tile).
2. In the **Manage** dropdown, choose **Ad Val Payment**.
3. In the Ad Valorem section, click the **blue arrow** next to an ad valorem segment for a previous year. **Waive** both the penalty and interest fees.
  - a. Select a **Reason** from the dropdown menu and enter a **comment**.
  - b. **Undo** the penalty fee waive you just did.
4. If there are multiple year's owed, deselect a checkbox for 1 of the year's taxes.
  - a. Customers do not have to pay their past due ad valorem all at once. The payment can be broken up by year.
5. **Add to Cart** and **Checkout**.

## F. Single Renewal

1. From the Customer Search Results, click the **blue Customer ID Number**.
  - a. This will open a pop-over in which you can scroll down to see their vehicles.
  - b. Select a customer that has a vehicle with a blue R icon: 
2. From the **Manage** dropdown of that vehicle's tile, select **Renew**.
3. From the Add Duplicate dropdown, choose **Fee Only**.
4. In the Ad Valorem section, select a year and **waive** the penalty and interest fees.
5. **Add to Cart**, and finish checking out the transaction.

## G. Bulk Renewal

In this scenario, you will perform a bulk renewal. This is where you will renew multiple boats, ready for registration renewal, at one time. You will need to search for a customer that has multiple boats ready for renewal to perform this scenario.

18. Search for a Customer that has multiple vehicles with the blue R icon (ready for renewal). From the Search Results, click on the **blue Customer ID Number** to open a pop-over for a quick view of the customer's boats.
  - a. This scenario works best if the customer has more than 1 vehicle to renew, but can also be done with 1 vehicle if the search becomes too tedious.
19. From a Customer Account Page, click the blue **'Renew All'** button in the Vehicle Section. The number in parenthesis will be the number of vehicles that are available to be renewed at this time.
20. From the Shopping Cart, click **Checkout** and finalize the transaction.



## H. Salvage-Transfer

1. From a Customer Account Page, select a vehicle with no PVA issues.
2. Click the **Title** drop-down menu and choose **Salvage**.
  - a. From the expanded options, select '**Salvage-Transfer**'.
21. If there are delinquent taxes due, click [here](#) in the red alert and choose to pay with this application.
22. Add a **County of Dockage** and/or **Situs Address** and click **Continue**.
  - a. If it is missing any required information, create what is needed.
23. Enter a **Seller Notary Date** and click **Continue**.
24. Add **2 Buyers** from your list, choose an ownership connector, enter a **Notary Date** and fix any customer profile issues, then click **Continue** until you are at the Purchase Information Page.
  - a. If any of the Buyers owe ad valorem, choose to pay them with the application.
25. Create the **Date of Purchase** and **Purchase Price**, and use **Transfer from Individual to Individual** for the Use tax Description.
26. On the Finalize Page, choose **Add Lien** from the Lien Information Section.
  - a. This will take you back to the Lien Information Section where you can **add a pending lien** to the application.
  - b. Click the **Finalize bubble** at the top.
27. **Add to Cart** and Checkout the transaction.

## I. Repossession-Lienholder Transfer

1. From the **Customer Account** page, select a vehicle with no PVA issues.
2. Click the **Title** dropdown menu, select **Repossession**.
  - a. From the expanded option, select **Repo-Lienholder Transfer**.
  - b. If an alert tells you there is an active lien on this vehicle, choose another vehicle.
3. On the Vehicle Information step, if there are delinquent taxes due, click [here](#) in the red alert and choose to **pay with this application**.
- a. The boat being transferred must not have any delinquent ad val for the application to be processed.
  4. Add a **County of Dockage** and/or a Situs Address and click **Continue** until you reach the Buyer Information Page.
  5. Add 1 **Buyer**, search by **Organization's Name** and type '**Bank**' in the search field.
- a. Click **Search** and choose from any of the search results.
  6. Enter a **Buyer Notary Date** and click **Continue**.
  7. Add **Registration** and **Continue**.
  8. On the Purchase Information Page, enter a **Date of Purchase**.
- a. Request **Extra Review** from MVL, citing '**Practice**' as the comment.
  9. If everything on the Finalize step is green, check out the transaction.



## J. Title Application Queue- For Approval

In this scenario, you will visit the Title Application 'For Approval' Queue. This queue will show you all the Title Applications that are waiting to be 'Sent to MVL' for approval.

1. From the Home Page, click **Title Application Queue**.
2. In the popover, click **For Approval**.
  - a. These are the applications that have been completed in your office and are awaiting submission to MVL.
3. Explore the filtering dropdown menus in the **Title Action** and **Clerk Name** columns.
4. Click the arrows beside the **Title Action** column header.
5. Click any **Title Number** to go to the **Vehicle Summary** page.
6. To view the status of an application, click the **Title Application Status** button.
7. Scroll to the bottom of the page, and in the Review section, choose the '**Hold in Clerk's Office**' and add a comment.
8. You will be returned to the For Approval Queue. Notice the application now says 'Yes' in the Clerk Hold Column.

## K. Repossession-New Buyer Transfer

1. From the **Customer Account** page, select a vehicle with no PVA issues,
2. Click the **Title** dropdown menu, select **Repossession**.
3. From the expanded option, select **Repo-New Buyer Transfer**.
4. **If** there are delinquent taxes due, click [here](#) in the red alert and choose to pay with this application.
5. Add a **County of Dockage** and/or a Situs Address and click **Continue** until you reach the Buyer Information Page.
6. Add 1 **Buyer**, enter a **Buyer Notary Date** and **Continue** to the Registration Page.
  - a. If there are delinquent taxes owed on the Buyer's other vehicles, choose to pay them with the application.
  - b. Add **Registration** and **Continue**.
7. On the Purchase Information Page, the **Use Tax Description** will be **In-State Transaction from Kentucky Dealer** and complete the **Purchase Date** and **Purchase Price** fields.
8. Continue through the Finalize step and check out the transaction.

## L. Filing a Lien on an Active Title

1. Using a Title Number from the data provided, navigate to the **Vehicle's Summary Page**.
  - a. For this scenario, you want an active title that does not currently have 2 liens.
2. In the Lien Information Section, click **Add Lien**.
  - a. If this button isn't available, that's because the boat already has 2 liens on it and you cannot add another. Choose another title from your data.
3. In the Lien Status dropdown, select **Filed**.
4. **Create the required information** and select the **checkbox** next to 'charge late lien filing fee'.
  - a. KAVIS is not creating lien file numbers. Your business process for validating the Lien File Number is to remain the same; this is just where you would enter the number.
5. Click **Add**, then **Add to Cart** and checkout the Customer.



## M. Update Title Application

How to perform an Updated Title Application:

1. Using a **Title Number** from the data list provided, go to the Vehicle Summary Page.
  - a. In the Vehicle Information section, click the **Update** button.
2. If there are delinquent taxes owed on the vehicle, choose to pay them with the application fees.
  - a. Change the **Engine Drive and Propulsion**.
  - b. If KAVIS has detected a missing or invalid HIN, choose the checkbox to request a state-issued HIN.
    - i. In production after we go live with the boats module, you will need to continue to scan all HIN Application documentation into PODD.
  - c. In the Motor section, if there is a motor, click **Copy** and create a **Serial Number** for the new Motor.
  - d. If there is not a motor, click **Add Motor** and create the information.
3. Click **Continue** till you are on the Buyer Information Page.
  - a. If there is a red flag next to the Buyer's name, click on it and **create** the missing information.
  - b. Click **Save** to return to the Title Application.
4. Click **Continue** to go to the Lien Information Page. If there is less than 2 liens on the boat, click **Add Lien** and add a **Filed Lien** to this application.
5. On the Finalize Page, Click **Add To Cart** and finalize the application.



## N. Duplicate Title Application

This is how to update an address on a current KY Title.

1. Using a **Customer Name** from the data list provided, go to their Customer Account Page.
2. Click the **Edit** button next to their name.
  - a. Create a **new Physical Address** and click **Save**.
    - i. If the customer is missing any required information, create that as well.
3. In the Title dropdown for one of their boats, choose **'Duplicate'**.
  - a. If the boat has delinquent ad val, choose to **Pay with Application**.
  - b. Choose a **County of Dockage** that is a different county than the owner's county of residence, create a **Situs Address**.
4. Click on the **Buyer Information** bubble at the top of the page.
  - a. If there is a red flag next to the Buyer's name, click on it and **create** the missing information.
5. Click the **Additional Information** bubble at the top of the page.
  - a. Chose the **Add Alternate Mailing Address** checkbox.
  - b. Choose **PO Box** from the dropdown and create the address.
    - i. This is available if the new title needs to be sent to an address other than the Customer's.
6. From the Finalize step, click **Print Preview** and notice the Owner's new home address that was changed in step 2 (if they are the Primary Owner).
  - a. Click **Add To Cart** and finalize the application.

## O. Salvage-Update

To change an active title to a Salvage Title while keeping the same Owners, perform a Salvage-Update Title Application.

1. Starting from a **Customer Account Page**, start with **Title** dropdown menu. Choose 'Salvage' and then **'Salvage-Update'** from the expanded options.
  - a. If an error message appears stating that the action cannot be performed because an active lien exists, choose another Vehicle.
    - i. In Production, you will need to delete the lien from the title, then add it back to the new application.
2. On the Vehicle Information Step, if there are delinquent taxes owed on this vehicle, pay them with the application fees.
3. On the Buyer Information Page, if there are red flags next to the Owner(s), create the missing information.
4. On the Finalize Step, Add the application to the cart and checkout.

**Please feel free to practice these and other actions available in the Practice Environment (UAT).**

**We will update this document as more functionality is released.**

**Don't hesitate to contact us with any questions or recommendations you have:**

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