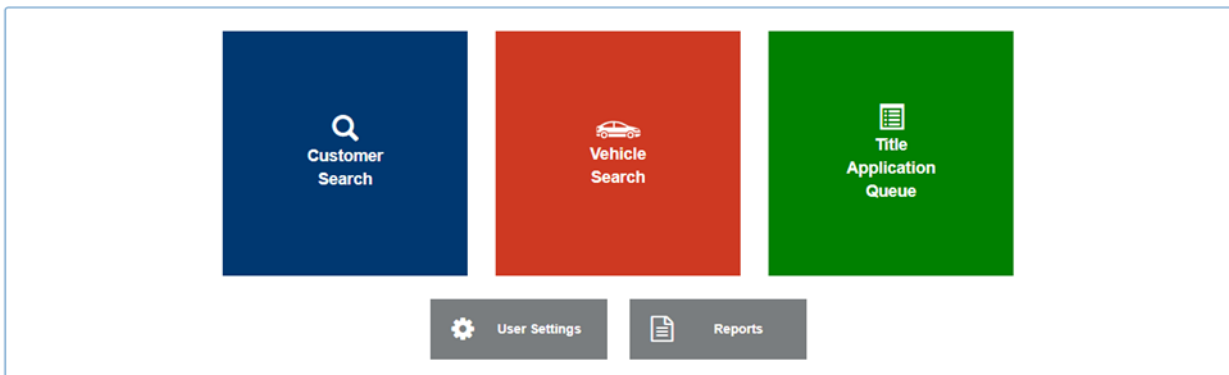


## Customer Account Page

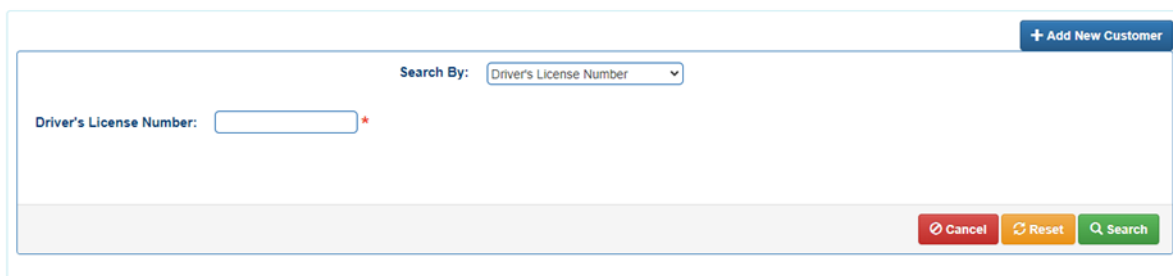
This guide will walk through how to search for customers, view their information such as address, held titles, registration statuses, and delinquencies. The guide will also walk through how to edit customer data.

### Searching for a Customer

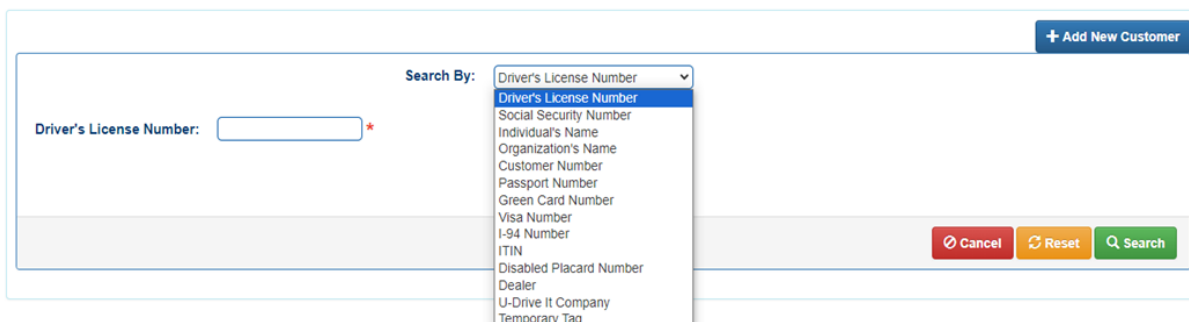
1. On the 'Home Page' select "Customer Search".



2. On the 'Customer Search' click on the 'Search By' drop down

A screenshot of the Customer Search form. At the top right is a '+ Add New Customer' button. Below it is a 'Search By:' dropdown menu currently set to 'Driver's License Number'. To the left is a text input field labeled 'Driver's License Number:' with a red asterisk. At the bottom right are three buttons: 'Cancel', 'Reset', and 'Search'.

3. This is how a user can select different search criteria:

A screenshot of the Customer Search form, similar to the previous one, but with the 'Search By:' dropdown menu open. The dropdown list shows the following options: 'Driver's License Number' (highlighted), 'Social Security Number', 'Individual's Name', 'Organization's Name', 'Customer Number', 'Passport Number', 'Green Card Number', 'Visa Number', 'I-94 Number', 'ITIN', 'Disabled Placard Number', 'Dealer', 'U-Drive It Company', and 'Temporary Tag'. The rest of the form elements remain the same.

#### 4. Fill in the information and click 'Search'

[+ Add New Customer](#)

Search By: Individual's Name

Last Name:

\* First Name:

Middle Name:

Suffix: v

Date of Birth:

County: ALL

Cancel
Reset
Search

#### 5. Choose the customer from the tablet from the search results. The more specific the information is the more accurate the results will be. Click 'Select' to go to that customer's account page.

Customer ID	Driver License	Last Name	First Name	Middle Name	Suffix	DOB	SSN	ITIN	Physical Address	County of Residence	Preferred Name	
001411348		SMITH	ADAM			05/11/1960	xxx-xx-3221		2200 Treetop Ln, HEBRON, KY, 41048	BOONE		<a href="#" style="background-color: #0070c0; color: white; padding: 5px 10px; border-radius: 3px;">Select</a>
001271922		SMITH	ALBERT			05/11/1960	xxx-xx-5662		1016 Orchid Rd, FLORENCE, KY, 41042	BOONE		<a href="#" style="background-color: #0070c0; color: white; padding: 5px 10px; border-radius: 3px;">Select</a>
001122990	S91091261	SMITH	ALBERT	E		03/18/1938	xxx-xx-6852		1016 Orchid Rd, FLORENCE, KY, 41042	BOONE		<a href="#" style="background-color: #0070c0; color: white; padding: 5px 10px; border-radius: 3px;">Select</a>

Alternatively, preview customer information by clicking a customer's ID to bring up '[Customer Data](#)' without navigating away from the current search.

#### 6. The Customer Account page will display:

Home
Customer Search
Customer Account

**SMITH, AC**  
Cust #: 001655063  
10142 Owenton Rd  
FRANKFORT, KY 40601

Edit
View
Notes

**Action Center**

PVA There are Ad Valorem problems for 2 vehicles. Please contact the PVA.

PVA Customer has 2 vehicle(s) with Cancelled Title Application.

**Vehicles (2)**

Select By Type v

Go to List View

Filter By: Alerts ?

🚗
PVA
PVA
P

2000 FORD EXPLORER  
Title #: 221530375001  
Application Cancelled

Reg: Title Only

View

🚗
PVA
PVA
P

2000 FORD EXPLORER  
Title #: 221640375002  
Application Cancelled

AAA103  
Unbridled Spirit  
Reg: Expired

View

**Disabled Placards**

No Disabled Placard History found!

## Preview Customer Data

The 'Customer Data' page is similar to the 'Customer Account' page displaying similar information but with no actions to edit anything. The 'Customer Data' page is just an overlay over customer search results. This allows a user to preview customer information without having to re-search if this is not the customer account.

1. Navigate to a customer's 'Customer Data' overlay by clicking on their Customer ID on the 'Customer Search' page.

Last Name:  \* First Name:  Middle Name:  Suffix:

Date of Birth:  County:

ⓘ Your search resulted in more than 100 records. Please enter more specific search criteria to display fewer results.

Customer ID	Driver License	Last Name	First Name	Middle Name	Suffix	DOB	SSN	ITIN	Physical Address	County of Residence	Preferred Name	
001374034		SMITH	ADAM				xxx-xx-2811		205 Langley Ct, CLARKSON, KY, 42726	GRAYSON		<input type="button" value="Select"/>
000619820	S93365984	SMITH	AMBROSE	E		08/29/1939	xxx-xx-4196		406 Huffman Rd, LEITCHFIELD, KY, 42754	GRAYSON		<input type="button" value="Select"/>
000619825	S93355406	SMITH	AMILL			08/29/1924	xxx-xx-5506		214 Cave Creek Rd, FALLS OF ROUGH, KY, 40119	GRAYSON		<input type="button" value="Select"/>
001275042		SMITH	AMY				xxx-xx-0109		34 Foxborough Dr, LEITCHFIELD, KY, 42754	GRAYSON		<input type="button" value="Select"/>

2. The 'Customer Data' page will display over the 'Customer Search' page:

**Personal Information**

Last Name: SMITH  
First Name: AC  
Middle Name:  
Suffix:  
Birth Date: 02/01/1980  
Preferred Name:  
Gender: M  
Citizenship: United States  
Deaf or Hard of Hearing: No  
Deceased: No

**Phone**  
No phone data.

**Identification**  
SSN: xxx-xx-3041  
I-94: 12345678912

**Address**  
County of Residence: FRANKLIN  
Physical  
10142 Owenton Rd  
FRANKFORT, KY 40601-94

**Alias**  
No Alias data.

Clicking 'View' will navigate to the 'Vehicle Summary' page of this account

Clicking 'Select' will navigate to the 'Customer Account' page

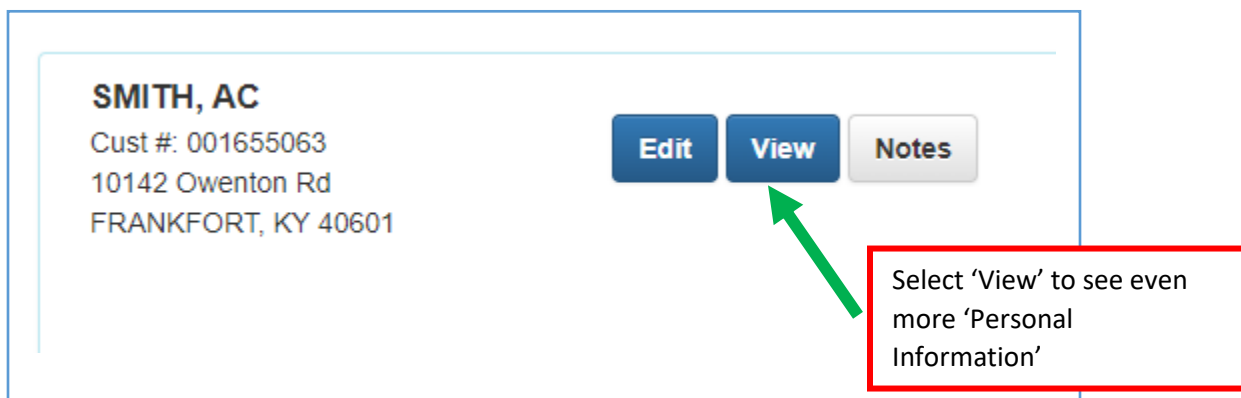
**Vehicles (2)**

Filter By: Alerts

## Customer Account Page Overview

The Customer Account Page is where all information regarding active or previously owned vehicles, boats, or disabled placards will display. Users may edit information from this page.

### Customer Information



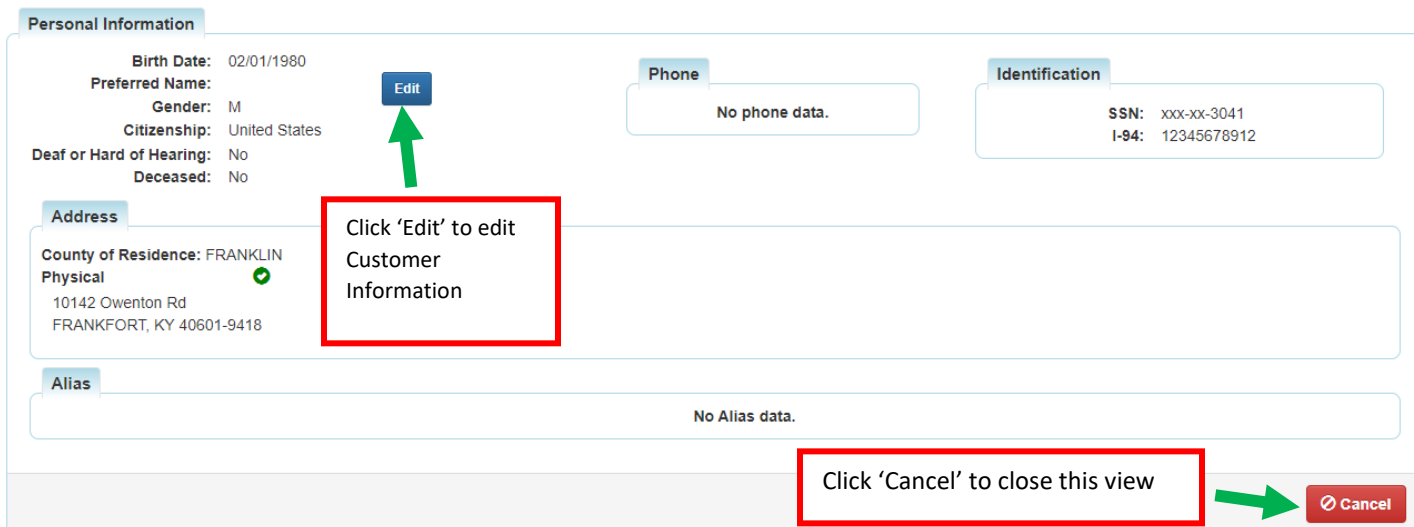
**SMITH, AC**  
Cust #: 001655063  
10142 Owenton Rd  
FRANKFORT, KY 40601

[Edit](#) [View](#) [Notes](#)

Select 'View' to see even more 'Personal Information'

Detailed description: This screenshot shows a customer information card for 'SMITH, AC'. The card displays the customer's name, a unique ID (Cust #: 001655063), and their address (10142 Owenton Rd, FRANKFORT, KY 40601). To the right of the address are three buttons: 'Edit', 'View', and 'Notes'. A green arrow points from a red-bordered text box to the 'View' button. The text box contains the instruction: 'Select 'View' to see even more 'Personal Information''.

### Personal Information



**Personal Information**

Birth Date: 02/01/1980  
Preferred Name:  
Gender: M  
Citizenship: United States  
Deaf or Hard of Hearing: No  
Deceased: No

[Edit](#)

**Phone**  
No phone data.

**Identification**  
SSN: xxx-xx-3041  
I-94: 12345678912

**Address**  
County of Residence: FRANKLIN  
Physical  
10142 Owenton Rd  
FRANKFORT, KY 40601-9418

**Alias**  
No Alias data.

Click 'Edit' to edit Customer Information

Click 'Cancel' to close this view

[Cancel](#)

Detailed description: This screenshot shows a 'Personal Information' form. It is divided into several sections: 'Personal Information' (with fields for Birth Date, Preferred Name, Gender, Citizenship, Deaf or Hard of Hearing, and Deceased), 'Phone' (with 'No phone data.'), 'Identification' (with SSN and I-94), 'Address' (with County of Residence, Physical address, and a green checkmark), and 'Alias' (with 'No Alias data.'). A blue 'Edit' button is positioned above the 'Personal Information' section. A red-bordered text box with a green arrow points to this button, containing the text 'Click 'Edit' to edit Customer Information'. At the bottom right, there is a red 'Cancel' button with a white circle and slash icon. A red-bordered text box with a green arrow points to this button, containing the text 'Click 'Cancel' to close this view'.

**Action Center- Calls attention to certain issues that need to be resolved**

**Vehicles tab- Vehicles and boats the customer currently owns**

The screenshot shows a 'Vehicles (2)' tab with a 'Select By Type' dropdown and a 'Filter By: Alerts' button. Two vehicle cards are displayed. Each card includes a vehicle icon, a 'PVA' icon, a document icon, and a 'P' checkbox. The first card shows '2000 FORD EXPLORER' with title # 221530375001 and 'Application Cancelled'. The second card shows '2000 FORD EXPLORER' with title # 221640375002, 'Unbridled Spirit', and 'Reg: Expired'. Both cards have a 'View' button.

This detailed view of a vehicle card includes the following elements: a vehicle icon, a 'PVA' icon, a document icon, and a 'P' checkbox. The text on the card reads: '2000 FORD EXPLORER', 'Title #: 221640375002', 'Application Cancelled', 'AAA103', 'Unbridled Spirit', and 'Reg: Expired'. A 'View' button is located at the bottom right of the card.

Vehicle Model

Title Number

Last Title Action Taken  
"Registration Type"

Ownership Icon

Plate Number









Plate Type

Registration Status

**Action Icons and Ownership Icons** are visual cues that show information about the vehicle or owner.

**View Button** will navigate to the 'Vehicle Summary' page for that vehicle.

**Disabled Placard tab-** displays placard history for the customer

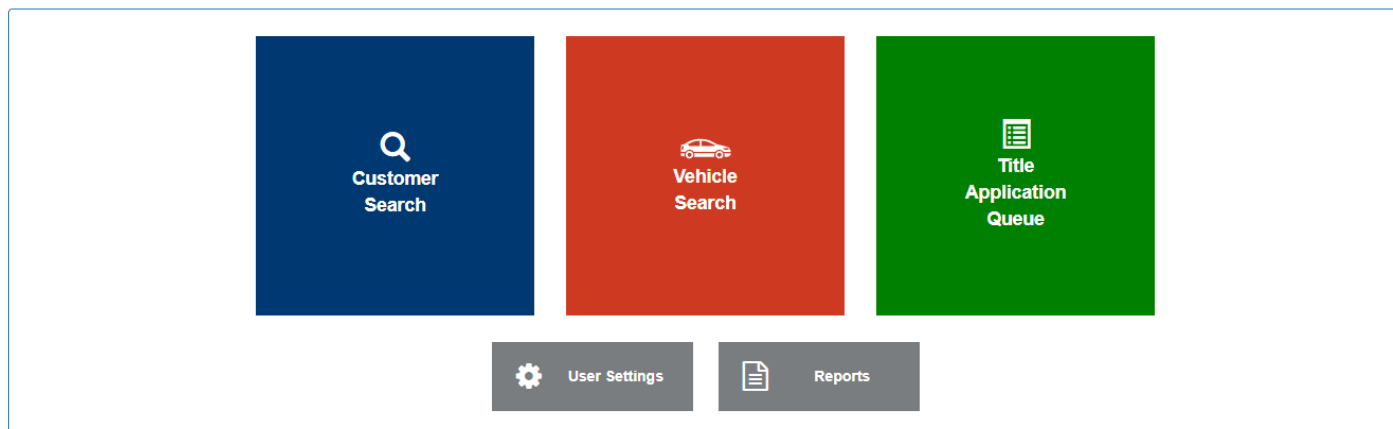
▼ Disabled Placards									
Trans ID	Control Number	Placard Type	Placard Year	Placard #	Issue Date	Expiration Date	Status	Authorized Placard(s)	Comments
031091661	20-155-037-0-DP-00071		47	569643	06/03/2020	05/31/2026	Active	1 of 2	
031091243	20-155-037-0-DP-00067		47	569615	06/03/2020	05/31/2026	Inactive	1 of 2	
013408163	18-207-037-0-DP-00012		46	503756	07/26/2018	07/31/2020	Inactive		
002169690	16-172-037-0-DP-00002		45	897752	06/20/2016	06/30/2018	Expired	1 of 2	

## Vehicle Summary Page

### Searching for a Vehicle

The 'Vehicle Search' is used for locating and viewing all vehicles that have active titles and vehicles with an application in the 'Title Application Queue'

1. From the 'Home Page' select 'Vehicle Search'



2. From the 'Vehicle Search' page select the criteria to search by from the drop-down menu

Search By:  \*

- Select One
- VIN
- Plate Number
- Lien Number
- Title Number
- KY Number
- HIN
- Authorization Number
- Title Document Number

### 3. Enter the information for the vehicle and select 'Search'

Search By:  \*

Title Number:  \*

### 4. The results will appear below. Click the 'Vehicle' button to go to the 'Vehicle Summary' page or the 'Customer' button to go to the 'Customer Account' page

Search By:  \*

Title Number:  \*

Type	Vehicle	Title #	KY / Plate #	Lien #	Title Status	Owner	Go To
	2014 RAM RAM VIN: 3C6JR7AT4EG132314 - 999	142271100017	0582FN		Active - Title Issued	7816056 GANT, BARRY 5220 Highland Lick Rd, SHARON GROVE, KY 42280 TODD	<input type="button" value="Vehicle"/> <input type="button" value="Customer"/>

## Vehicle Summary Page Overview

### Owner(s)

Owner(s) Chain of Ownership

Customer ID	Driver License	Customer Name	SSN/FEIN	Address	Begin Tax Exempt Date
000845179	D94693149	DUE, DAVID CHARLES 	<a href="#">xxx-xx-9286</a>	10236 Hwy 16, VERONA, KY 41092 BOONE	

Clicking here will bring up the 'Customer Data' pop out.

This will show a list of all vehicles this customer has owned.

Title- Shows current status, type of title, title number and prior title number

▼ Title

**Status:** Active - Title Issued

<b>Type:</b> Transfer	<b>State Fee:</b> \$0.00
<b>Title #:</b> 151190080302	<b>Clerk Fee:</b> \$0.00
<b>Prior Title #:</b> 151120080255	<b>Use Tax:</b> \$0.00

**Use Tax Description:**

<b>Reel #:</b> 2015	<b>Blip #:</b> 0522	<b>Doc #:</b>
---------------------	---------------------	---------------

Registration Information

▼ Registration Information

**Status:** Expired

<b>Type:</b> Renewal	<b>County:</b> BOONE
<b>Reg. Date:</b> 06/02/2017	<b>Decal #:</b> E010378
<b>Exp. Date:</b>	<b>Prior Decal #:</b> E509935

**Remarks:**



### Purchase Information

▼ Purchase Information

**Date of Purchase:** **Purchase Price:** \$0.00  
**Trade-in Amount:** \$0.00 **Use Tax Credit:** \$0.00  
**Motor(s) Price:** \$0.00

### Ad Valorem Information

▼ Ad Valorem Information

Total Tax Due: \$20.15

	Tax Year	Situs	District	Tax Status	Value (Boat + Motor)	Action Date	County Collected	Due Date	Payment Date	Total Amount Paid
▶	2020	BOONE	13	Taxable	\$186.00	03/06/2020		10/06/2020		\$0.00
▶	2019	BOONE	13	Taxable	\$196.00	01/01/2019		04/30/2019		\$0.00
▶	2018	BOONE	13	Taxable	\$196.00	01/01/2018		04/30/2018		\$0.00
▶	2017	BOONE	13	Taxable	\$196.00	06/02/2017	BOONE	04/30/2017	06/02/2017	\$4.95
▶	2016	BOONE	13	Taxable	\$196.00	04/29/2016	BOONE	04/30/2016	04/29/2016	\$2.65

### Lien Information

▼ Lien Information

Lien Number	Status	Filed Date	Lien Holder	Address	County Filed	Released Date	
2341234213	Filed	12/12/2012	Josie Banking CO	244 Agnus Ave, Mobile, AL 333030333	BOONE		<a href="#">View</a>
	Pending		Lipson	KY			<a href="#">View</a>

## Vehicle Information

**Vehicle Information**

<b>KY Number:</b> KY2998UU	<b>County of Dockage:</b> BOONE
<b>HIN:</b> INVALIDKYHIN	<b>Primary Use:</b> Pleasure
<b>Vehicle Type:</b> Boat	<b>Length:</b> 14' 1"
<b>Year:</b> 1986	<b>Beam:</b> 5' 1"
<b>Make:</b> LOWELINE	<b>Occupant Capacity:</b> 3
<b>Model:</b> O	<b>Weight Capacity:</b>
<b>Boat Type:</b> Other	<b>Number of Toilets:</b> 0
<b>Hull Material:</b> Aluminum	<b>Toilet Type:</b>
<b>Engine Drive:</b> Outboard	<b>Number of Motors:</b> 1
<b>Propulsion:</b> Propeller	<b>Brand:</b>

## Motors

Brand:

**Motor(s)**

Year	Make	Horsepower	Serial Number	Fuel Type
	NONE	0	KY2998UU	Gas

**Situs Address- Address of boat dockage if the county of residence of the owner is different**

**Situs Address**

**Address:** 123 Guava Lane, Lakeville, KY 44334

## Vehicle History

**Vehicle History**

2019

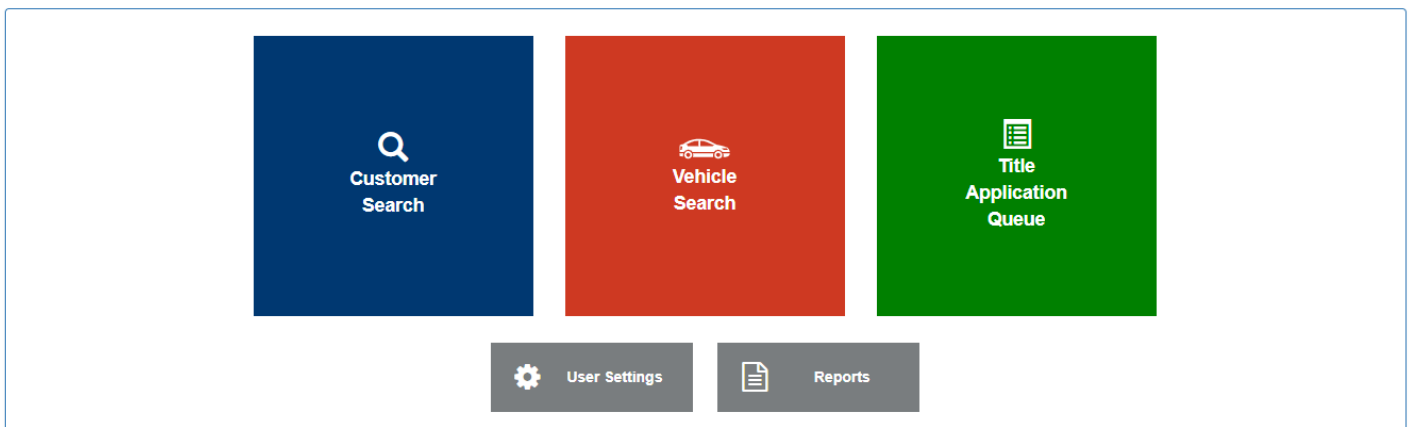
Trans Number	Cntrl Number	Action Date	Action Description	Amount	User
33431226		11/06/2019 1:14:27 PM	Lien Add		kytc\jarod.wylie
33431225		11/06/2019 1:14:13 PM	Lien Add		KYTC\jarod.wylie
33431214	19-310-008-0-TA-00002	11/06/2019 11:07:18 AM	Title Correction - Application Status		kytc\jarod.wylie
33429356	19-294-008-1-TA-00008	10/21/2019 11:26:17 AM	Title Correction - Application Status		kytc\jarod.wylie
33429354	19-294-008-1-TA-00007	10/21/2019 11:26:17 AM	Title Correction - Application Status		kytc\jarod.wylie

Clicking on a 'Trans Number' will navigate to the vehicle's 'Vehicle Summary' at the time of the action date.

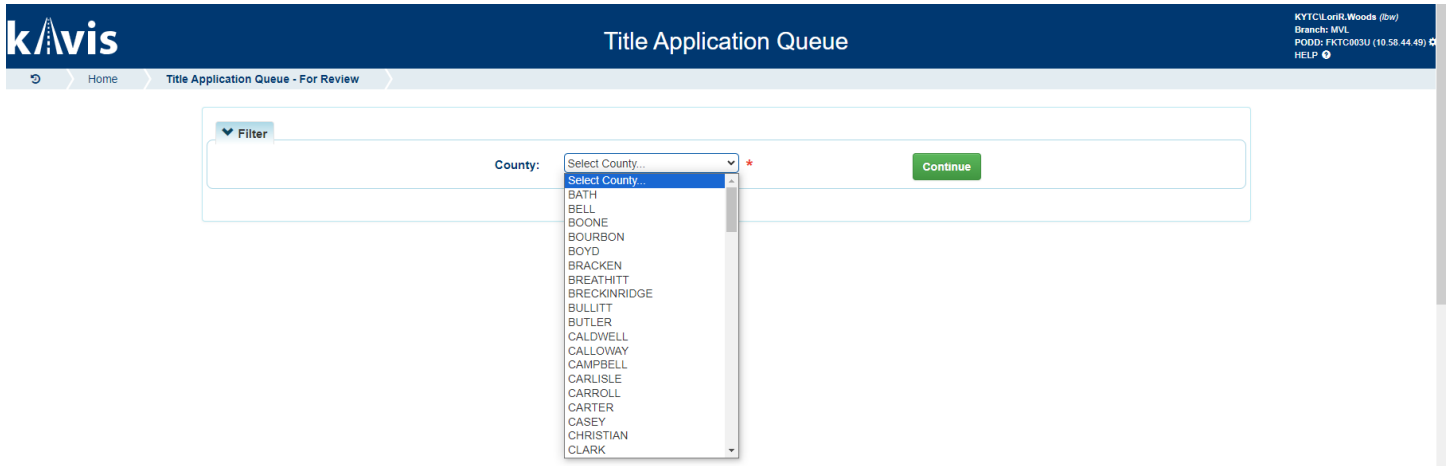
Clicking on a 'Cntrl Number' will bring up a view of all PODD documents scanned in on that transaction.

## Title Application Queue

1. From the 'Home Page' select Title Application Queue

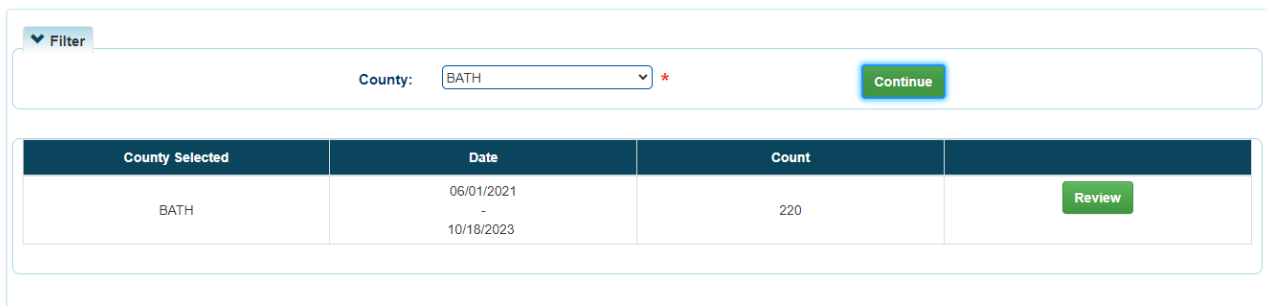


## 2. Select County and hit continue

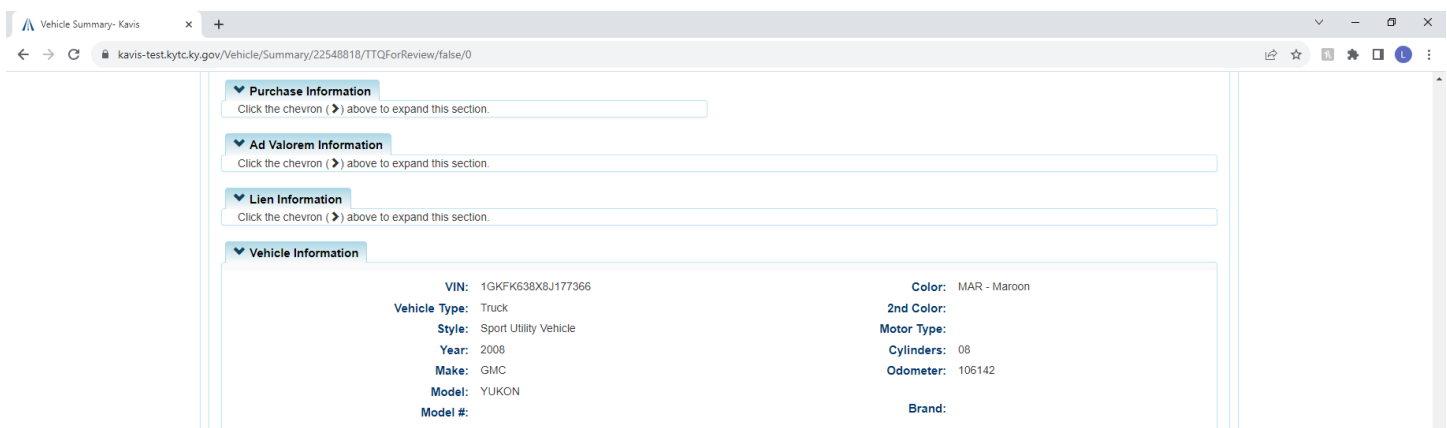


\*\*\* If the MVL Reviewer 1 user is assigned to a specific county or counties to work, only these counties will appear in the dropdown list when there are titles available to work.

KAVIS displays the date range, oldest to newest for the county and the count of applications available. Select 'Review' to begin.



The full 'Title Application Page' will display. All tabs are expandable for review as needed to approve or pend the application



PODD documents for the title will be linked at the bottom of the page. The reviewer can click on this to open them in a new tab for review

Click the chevron (▶) above to expand this section.

▼ Lien Information

Click the chevron (▶) above to expand this section.


▼ Vehicle Information

VIN:	JH2RC44052M611371	Color:	BLK - Black
Vehicle Type:	Motorcycle	2nd Color:	
Style:	Motorcycle	Motor Type:	
Year:	2002	Cylinders:	02
Make:	HOND	Motor #:	
Model:	SHADOW	Odometer:	15400
Model #:		Brand:	
VIN Sequence #:	999		

▼ History

Click the chevron (▶) above to expand this section.

▼ Review

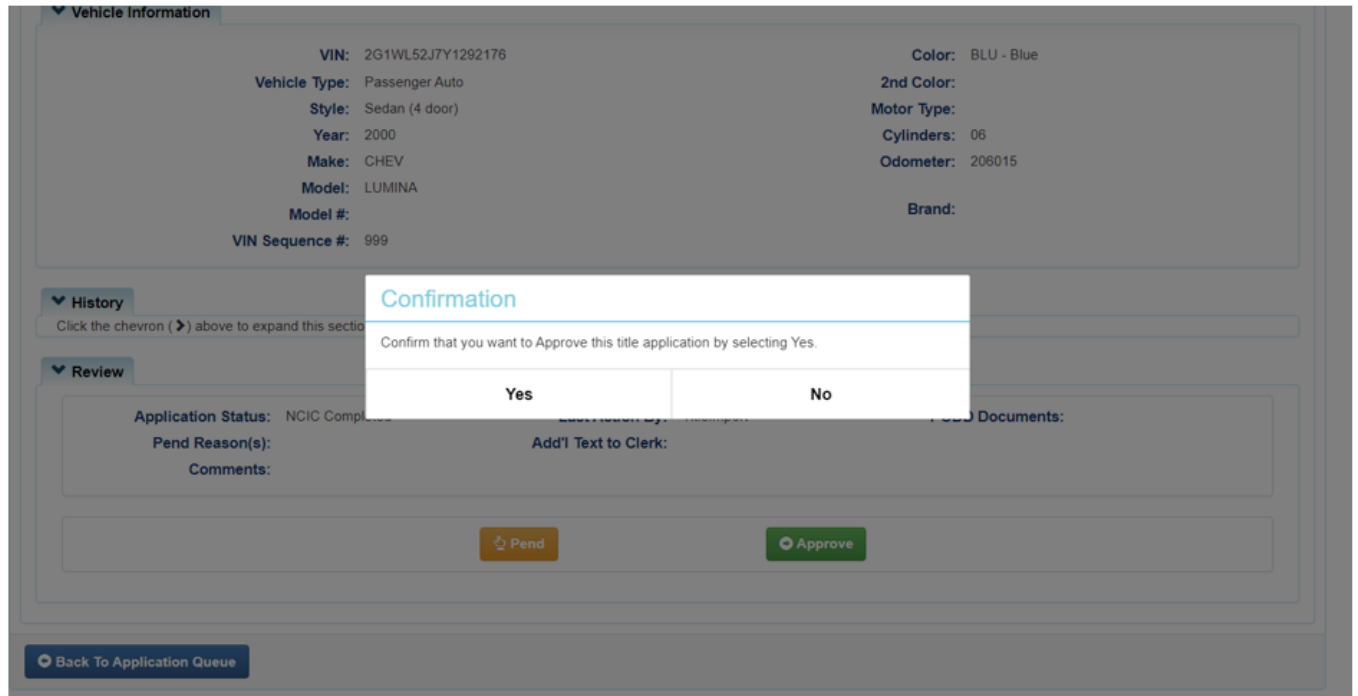
Application Status:	NCIC Completed	Last Action By:	TitleImport	PODD Documents:	
Pend Reason(s):		Add'l Text to Clerk:			
Comments:					

[Pend](#) [Approve](#)

[Back To Application Queue](#)

Select  
auto  
app

(NOTE: There's currently a bug in test that returns you back to the home screen instead of the next title in queue. This will be fixed in production)



Selecting 'Pend' will display a list of Pend Reasons along with a comment box. The reviewer can select multiple pend reasons if needed. If the MVL reviewer 1 pends the application it will move on to the MVL Reviewer 2 queue or the rebuilt queue if applicable

