DOR & PVA KAVIS BOAT MANUAL

Updated January 2020

# Table of Contents

Home Page Navigation

1. Clicking **kAvis** from any page will return you to the Home Page.
2. **HELP ❓** will open the Clerk Resource Site in a new tab with links to all KAVIS training materials.
3. **Contact the KAVIS Team** will open a dialog box for you to send KAVIS Support an email at kavis@ky.gov. Please be specific with your comments and concerns so we can best assist you.
   a. You can also call KAVIS Support at 502-782-1018.

The other buttons/tiles in the middle of the screen are explained in greater detail in the following pages of this manual.
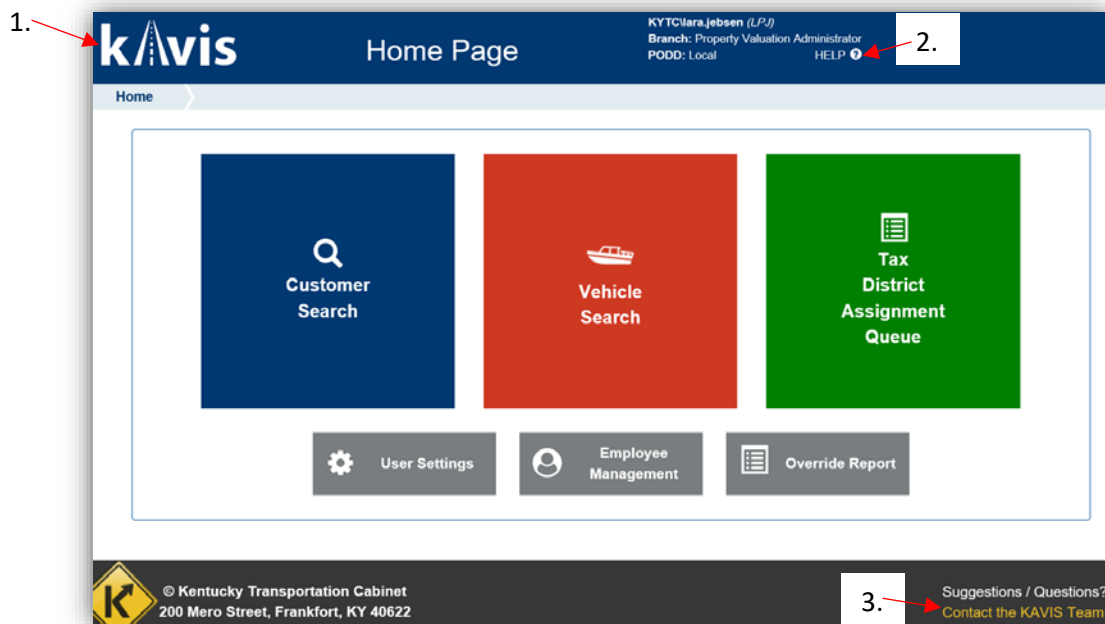

4. If you have a KAVIS account, you are referred to as a User. County Clerks, DOR and MVL employees with KAVIS accounts are also called Users.
   a. The 'User Management' section of this manual is referring to your personal KAVIS account and the accounts of your coworkers.

Customer Account Page

The Customer Account Page is a centralized location that holds a single customer's personal information, all current and previously owned vehicles, and disabled placard information.

Searching for a Customer

1. From the Home Page, click the blue 'Customer Search' tile.
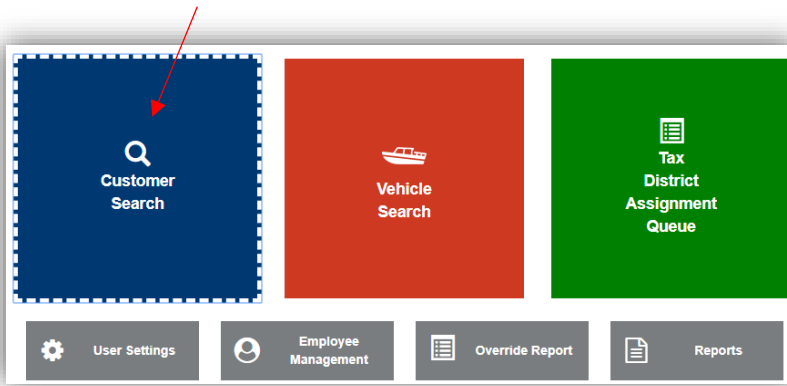
2. Choose from the dropdown menu how you would like to search for the customer, enter the requested info, and click [Q Search].

3. From the search results, click [Select] to be taken to their Customer Account Page
   a. The green customer accounts have been Driver's License verified.
   b. If you do not see the Customer you are looking for, click Q Display Search Criteria and the search fields will open above the list and you can edit your search criteria.
   c. If there are multiple customer accounts for the same person, the County Clerk's Office will need to merge the accounts. If you encounter more than one account for the one individual, choose the green highlighted account first. However, if you do not see the vehicle you need in that account, come back to this step and check the other customer's accounts.

4. From the Customer Search Results, if you encounter more than one account for an individual, you can click on the blue Customer ID number to open a pop-over that will allow you to preview the customer account information.
   a. If it is the correct customer account, click **Select**
   b. If it is not the correct customer account, click ⊘ **Cancel**
   c. The **View** button in the vehicle's tile will take you to its [Vehicle Summary Page](#).

Customer Account Page Details

1. On the Customer Account Page
   a. The **View** button next to the Customer's name will expand the page to show more of the Customer's personal information.
   b. The Action Center will give you information on PVA Issues, including the specific years each boat has missing information, and any boat that has past due taxes
   c. The **View** button in each vehicle's tile will take you to its Vehicle Summary Page.

2. The List View will automatically occur if there are 12 or more vehicles
   a. The ⓟⓥⓐ symbol will appear in the Alerts column
   b. To go to a Vehicle Summary Page, select the checkbox next to the vehicle and click **View**.

3. Clicking **❯ Previously Owned Vehicles** at the bottom of the Customer Account Page will open the section to show the Customer's previously owned vehicles.

   a. **View** will take you to that title's [Vehicle Summary Page](#).

3.
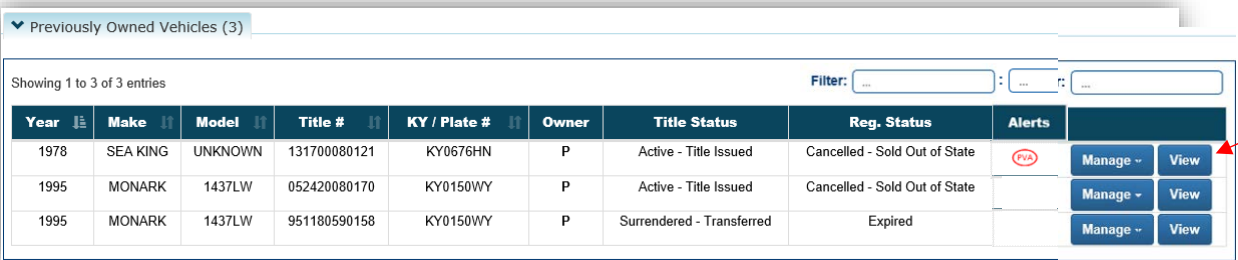
Year	Make	Model	Title #	KY / Plate #	Owner	Title Status	Reg. Status	Alerts	
1978	SEA KING	UNKNOWN	131700080121	KY0676HN	P	Active - Title Issued	Cancelled - Sold Out of State	PVA	Manage ⌄ View
1995	MONARK	1437LW	052420080170	KY0150WY	P	Active - Title Issued	Cancelled - Sold Out of State		Manage ⌄ View
1995	MONARK	1437LW	951180590158	KY0150WY	P	Surrendered - Transferred	Expired		Manage ⌄ View

Previously Owned Vehicles (3)

Showing 1 to 3 of 3 entries

Filter: ... : ... : ...

a.

Vehicle Summary Page

Searching for a Title Number

1. From the Home Page, click the Vehicle Search tile.
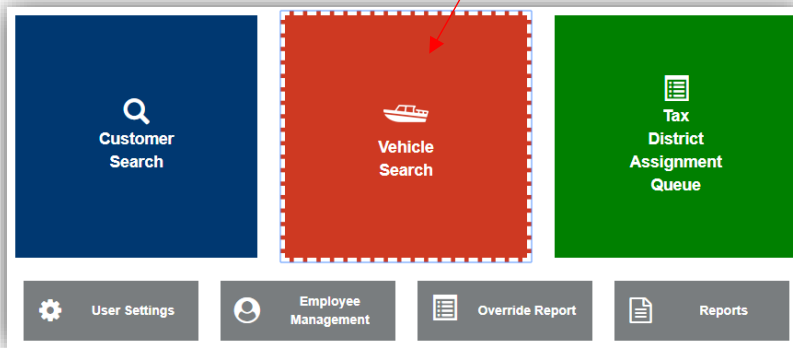
2. Choose from the dropdown menu how you would like to search for the vehicle, enter the requested info, and click $\boxed{\text{Q Search}}$.

3. From the search results, click $\boxed{\text{Select}}$ to be taken the Vehicle's Summary Page.

Vehicle Summary Page Details

1. At the very top are green 'Previous' and 'Next' buttons that will take you to other titles that have been issued on this vehicle.
2. The Owner(s) section will have information on the owners of each title.

3. Clicking the Customer IDs hyperlink will open a pop-over that will allow you to see all boats they currently own
    a. Clicking **View** will take you to that specific Vehicle's Summary Screen.
    b. **Select** will take you to their Customer Account Page
    c. **⊘ Cancel** will return you to the Vehicle Summary Page.

4. Back on the Vehicle Summary Page, nested behind the Owners tab is the Chain of Ownership. This contains information for all past titles for this vehicle.
    a. The yellow text is the title you are currently viewing.
    b. You may click on a Title Number to view that specific title.

5. Below the Owner Section is the Title and Registration Information sections, which will give you current information on the status of the title and registration.

6. The Ad Valorem section is where you will do your adjustments
   a. Details on this section can be found below in the 'Editing and Ad Valorem Segment' and 'Adding a New Ad Valorem Segment' sections of this manual.

7. Below this is the Vehicle Information and Attributes Sections, including Motor information, and Situs Address, if present.

8. The Vehicle History section at the bottom will show transaction history on this title.
   a. You can select from the years since the title was issued to see all transactions from that year.
   b. If a transaction includes documents that were scanned into the PODD Archive, a Cntrl Number will be present. Clicking it will open a pop-over with hyper-links to PODD Archive.

   c. Clicking the Transaction Number will highlight the transaction selected. The title will be shown as it was at the time of the transaction selected.
   d. A highlighted message will appear at the top of the page, click 'Reset' to go back to the most current version of the title.
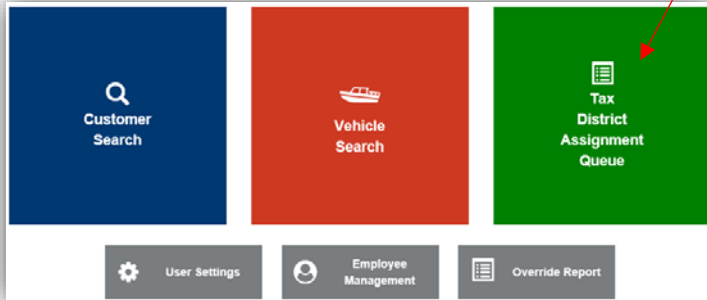
Tax District Assignment Queue

This screen in KAVIS replaces your current '88' and '$0 value' reports.
It will be continuously updating as necessary, so you can work this at a time that is convenient for your office.

1. From the Home Page, click 'Tax District Assignment Queue'.

2. If you are looking for a particular Owner or Vehicle, you can enter a name, title number, year, make or model into the Search field to narrow your list (even partial searches such as 'Yama' instead of 'Yamaha' will yield results).

3. When there are more than 100 records in your queue a 'Filter By' option will appear. You will have three choices.
   'Display All' will show all records in queue.
   'Missing Value' will only show records that have missing values.
   'Missing Tax District' will only show records that have missing tax districts.

4. Navigate through multiple pages of results.

5. Clicking on the Title Number will take you to the Vehicle Summary Screen where you can edit the Ad Valorem section as needed.
   a. Reference the 'Editing an Ad Valorem Segment' section of this manual for more details on how to do this.

6. When you successfully save the assignment of a value and Tax District to the title for every year that is missing, the title will no longer appear in the queue.

Go to Table of Contents

Add a Tax Exempt Date to a Customer

You may select a date for dropping responsibility of taxes for a Customer, this is available on any Vehicle Summary Page. For guidance on finding the Vehicle Summary Page, depending on what you have to search with, see either the 'Customer Account Page' or the 'Vehicle Summary Page' section of this manual.
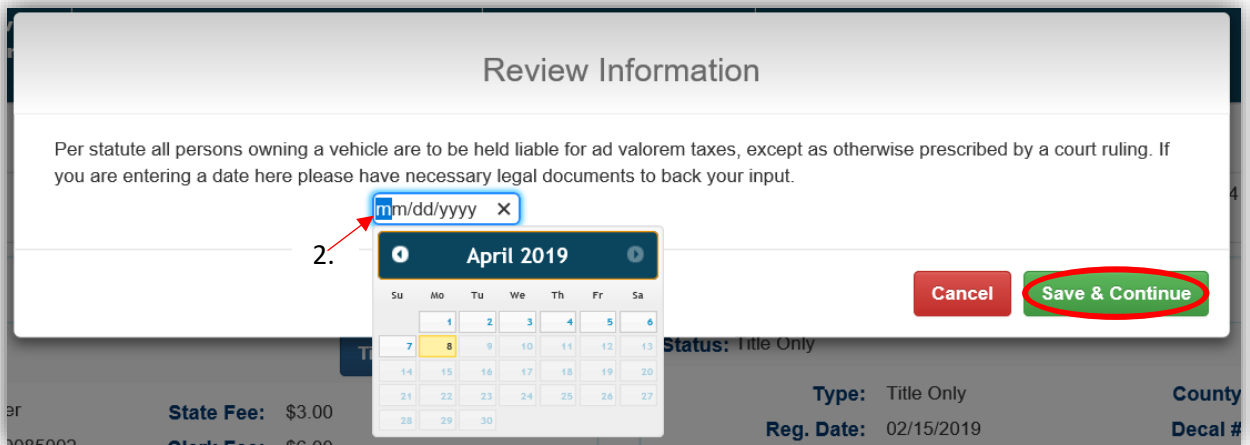
1. On the Vehicle Summary Page, select the 'Begin Tax Exempt Date' calendar icon.
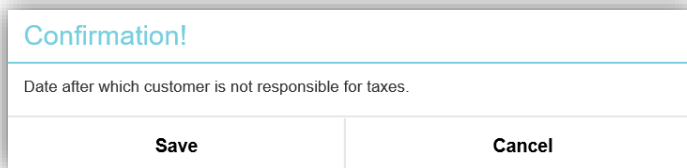
2. A pop-over will allow you to enter the date for the start of the Tax Exemption and click **Save & Continue**
    a. You must choose a past or the current date, you cannot choose a future date.

3. This will open a confirmation message, click 'Save'.

4. The date will be added to the column
   a. Click 📅 if it needs to be changed again.

5. Any penalty and interest on delinquent ad valorem due will stopped being calculated upon the date chosen in step 2.
   a. For example, a Customer has taxes due on her boat on 4/30/2019, and is released of tax liability as of 7/1/2018. If she comes to the Clerk's Office on 9/1/2018 to pay the past due ad valorem, she is only liable for the penalty and interest up to 7/1/2018.

Tax District Assignment Queue

1. From the Home Page, click 'Tax District Assignment Queue'.
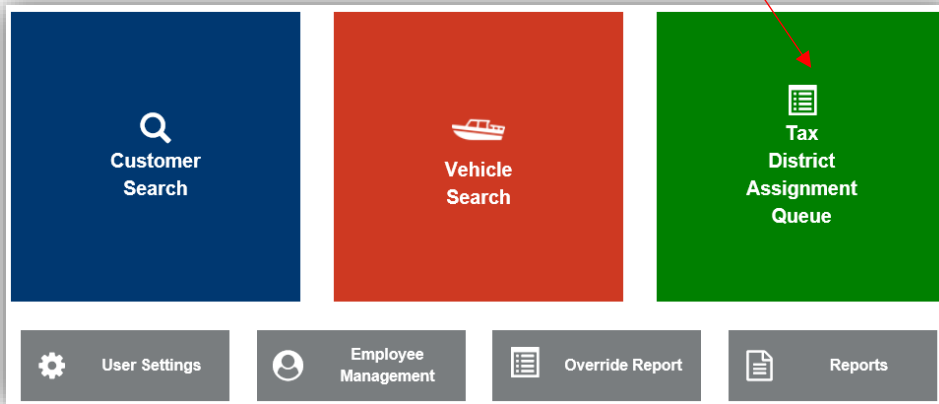
2. Select your filter settings and navigate the results.
   a. The County dropdown menu will have 'All' chosen, you can change it to search that specific County
   b. You can filter by entering a name, make, model, or numbers into the search field and hitting Enter on the keyboard.
   c. Navigate through multiple pages of results.

3. Clicking on the Title Number will take you to the Vehicle Summary Screen where you can edit the Ad Valorem section as needed.
   a. Reference the 'Editing an Ad Valorem Segment' section of this manual for more details on how to do this.
4. When you successfully save the assignment of a value and Tax District to the title for every year that is missing, the title will no longer appear in the queue.

Editing an Ad Valorem Segment

- In the Ad valorem section of any Vehicle Summary Page, you can change the Tax Status, Tax District, Override Value(s), and/or the County of Dockage.
- An assessed value is one that has been created by a yearly process.
- A PVA or DOR User can add an Override Value that will become the new Total Taxable Value of that vehicle.
- The Total Taxable Value cannot be below $100.
- Changing the County of Dockage will require a Situs Address.
- The ability to edit a paid tax segment is determined by the county in which it was paid, not the county of dockage.

1. The year dropdown will allow you to view the years this title has ad valorem assigned.
    a. Changing the "County of Dockage" to a county different from the Primary Owner's County of Residence requires a Situs Address to be entered. See Changing the County of Dockage and Enter Situs Address section of this manual.
    b. If you change the County of Dockage to one outside of your county and click 'Save', the Tax District will automatically change to 88 and you will no longer be able to edit this title's ad valorem for the year chosen.
        o If you need the County of Dockage changed to your County for any particular year, you must contact the PVA office of the current County or Dockage and have them change that specific year's segment to your county.

2. If the Ad Valorem has been paid, there will be an **Edit** button that will allow you to change the information up to 2 years after it has been paid.

3. Any Tax Status other than Taxable will change the Tax District to 99.
   a. ⊘ **Cancel** will undo all changes. In KAVIS, nothing is permanent until you click ⬇ **Save** .

4. After clicking Save, a red message will appear communicating a change with the specific year.
   a. An ↻**Undo Pending Changes** button will allow you to remove your changes and the segment will return to how it was before your changes. This button will be available until the Owner goes to the County Clerks Office and has the change processed (either a refund or paying more ad Val, depending on your changes).

5. The Tax Status of 'Taxable' will allow you to choose the Tax District
   a. The Tax District options will be the districts in your county.
   b. Enter an Override value for the Vehicle and the Motor (if applicable)
   c. Click ↻ **Recalculate** to see the changes in the Total Amount Due (this is optional)
   d. Clicking ⊘ **Cancel** will undo all changes. Click ⬇ **Save** to commit to these changes.

Go to Table of Contents
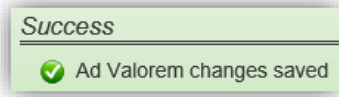
6. A Success message will show at the top of the Vehicle Summary Screen.

Success

✅ Ad Valorem changes saved

7. If the PVA icon is still there after editing the segment then you will need to press F5 on your keyboard to refresh your page.

Adding a New Ad Valorem Segment

In the Ad Valorem Section of a Vehicle Summary Page.
1. To add a new segment, click **Add New Ad Valorem Segment**.

2. KAVIS defaults the selection to the earliest year, based upon the title's active date, however you can choose a different year from the dropdown menu.
   a. This dropdown menu will offer only the years that this title is eligible to have a tax segment created.
   b. Changing the "County of Dockage" to a county different from the Primary Owner's County of Residence requires a Situs Address to be entered. See Changing the County of Dockage and Enter Situs Address section of this manual.
   c. If you change the County of Dockage to one outside of your county and click 'Save', the Tax District will automatically change to 88 and you will no longer be able to edit this title's ad valorem for the year chosen.
      o If you need the County of Dockage changed to your County for any particular year, you must contact the PVA office of the current County or Dockage and have them change that specific year's segment to your county.

3. You can change the Tax District from the dropdown options.
   a. Any Tax Status other than Taxable will change the Tax District to 99.

4. The Tax Status of 'Taxable' will allow you to change the Tax District, the options will depend on the districts in your county
   a. Enter an Override value for the Vehicle and the Motor (if applicable)
   b. Click **C Recalculate** to see the changes in the Total Amount Due
   c. **Q Save** will finalize the adjustment.

Changing the County of Dockage and Enter the Situs Address

In the Ad Valorem Section of a Vehicle Summary Page OR the Ad Valorem Section of the Title Application Queue.

1. Changing the "County of Dockage" to a county different from the Primary Owner's County of Residence requires a Situs Address to be entered.

2. The "Location" field is the only required field. Enter in the Location of the boat and click "Save".

Note: *Alternatively the "Address1", "City" and "Zip" fields can be entered rather than or in addition to the "Location" field.*

3. A message will pop up asking for confirmation. To commit to the change in County of Dockage click 'Yes'.
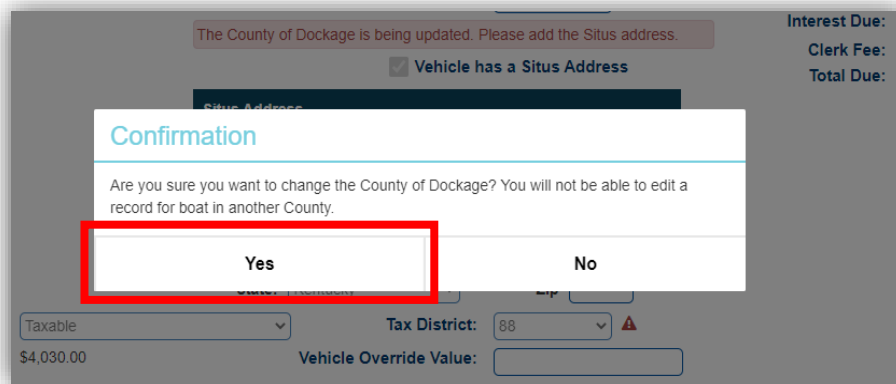
4. The "County of Dockage" will change and the "Tax District" will be set to 88.
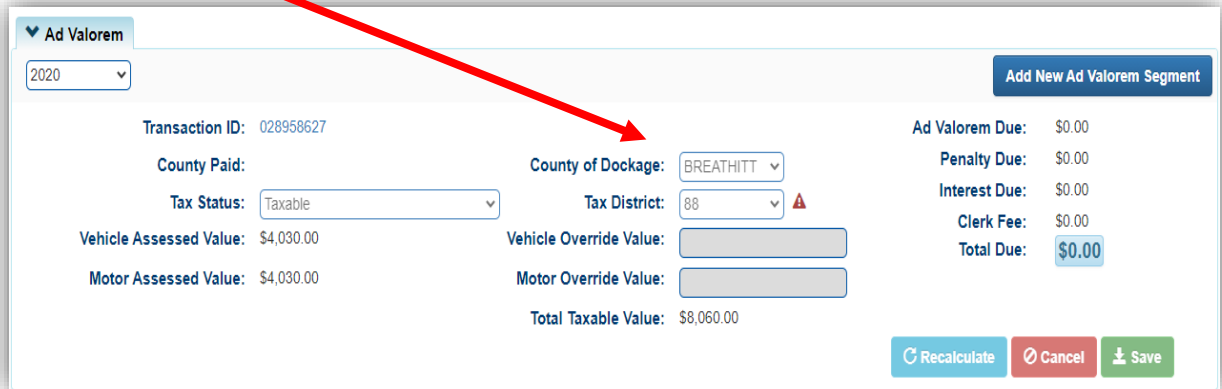
This Ad Valorem year is now only able to be edited by the County of Dockage that it has been changed to.

5. The Situs Address will be updated.

Working With your County Clerk

If a County Clerk Employee contacts you about a customer in their office needing your assistance, it will show on their screen as 'PVA Issues'.

PVA Issues mean the vehicle is missing the current year's tax segment, the Tax District is 88, or there is a $0 Assessed Value.

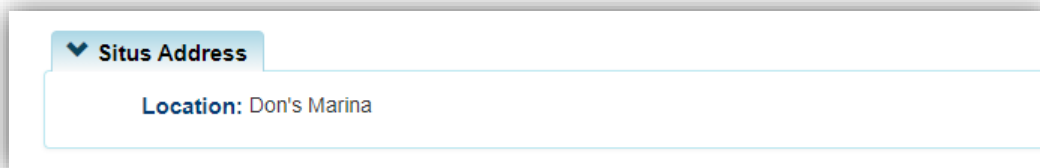Having PVA Issues on any of the Customer's boats will stop the clerk from performing actions on any of the titles and registration renewals for any of their boats.

A **Seller** in a title application, does not need all of their boats to be cleared of 'PVA Issues' in order for the title application to be completed, just the boat that is having the title action performed (transfer, duplicate or updated title…).

A **Buyer** in a title application must have **all** boats clear of 'PVA Issues' in order to be able to submit the application.

- o A quick way to check that you've cleared the boat and/or Customer of all 'PVA Issues' is to click on the Owner's Customer ID at the top of the Vehicle Summary Page. This will open a pop-over in which you can check the Vehicles tiles.
    - a. If the Customer has another vehicle needing your attention, you can click **View** to go to that Vehicle Summary Page.
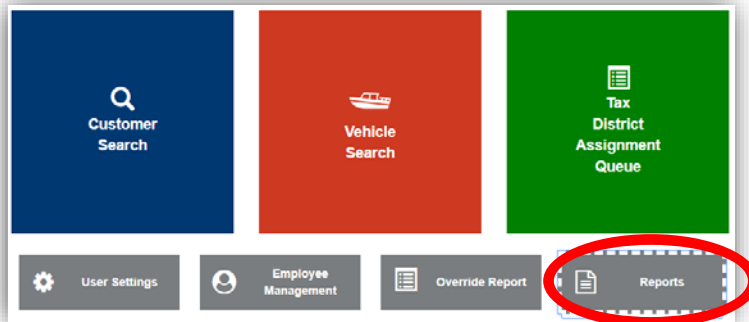
PVA Reports

*NOTE: If a PVA user does not have access to any of the reports mentioned in this section they may request access to them through the Department of Revenue.
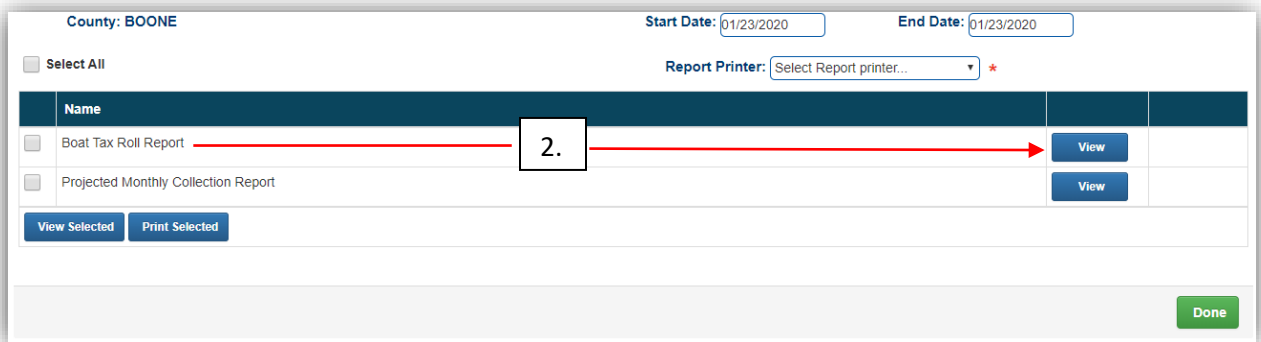
Boat Tax Roll Report

Prints a report that shows the tax collected for the previous year.

1. From the Home Page, click 'Reports'.

2. Select 'Boat Tax Roll Report' and click view. If the report is large it may take a while to load. Try clicking it once so multiple reports are not opened.

3. Boat Tax Report.

Projected Monthly Collection Report

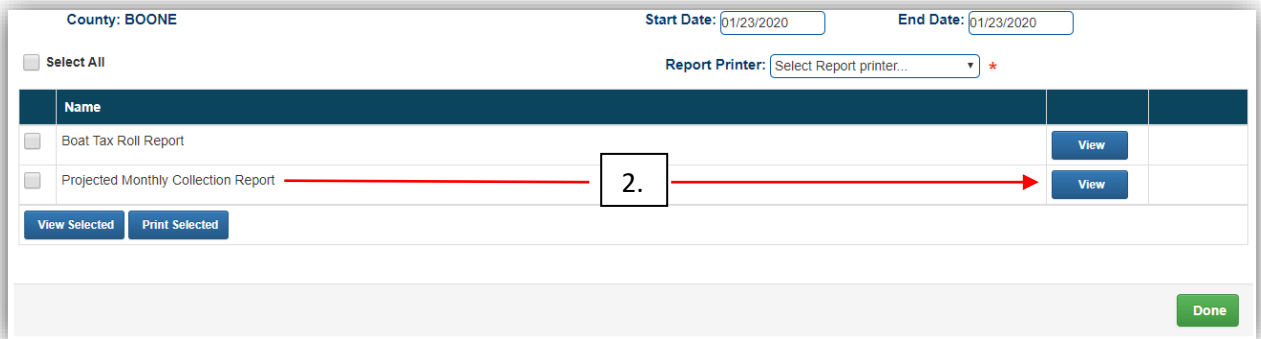Projections of how much Ad Valorem has been collected in a county for a specified month. This report will not be available until May, 2020.

1. From the Home Page, click 'Reports'.
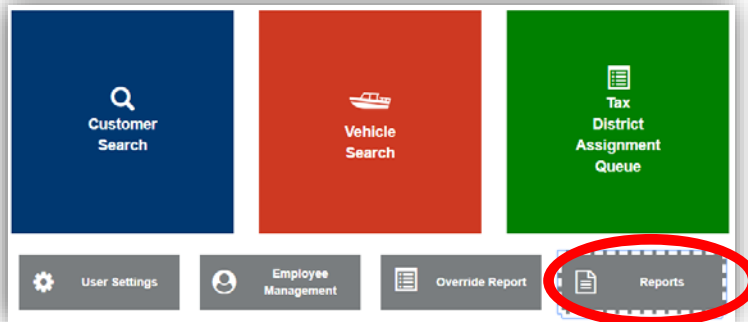
2. Select 'Projected Monthly Collection Report' and click view. If the report is large it may take a while to load. Try clicking it once so multiple reports are not opened.

3. Projected Monthly Collection Report.

Further Actions for Department of Revenue

User Management

Searching for a User's Account

This is useful to check the Permissions granted to your account, or to change another User's Permissions or Name.

1. From the Home Page, click on 'Employee Management'.
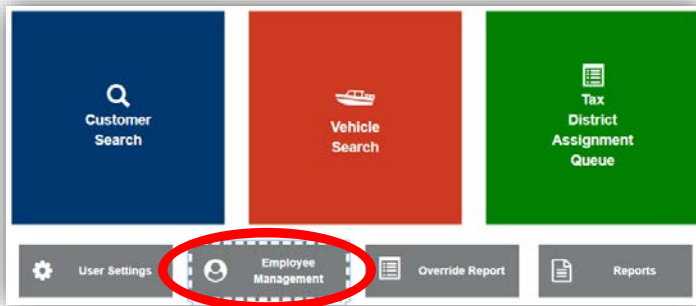
2. In the pop-over, choose 'User Search'.
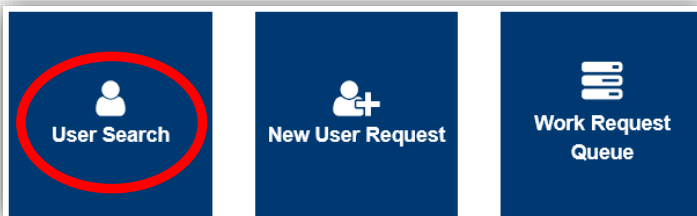
3. In the search field you must search for their User Name. This might be their name (firstname.lastname) or their PV number (pv49765).
   a. If you aren't sure of their User Name, and they aren't in the results when you search their name, search for 'pv' and you will get a list of all Users with PV as their user name and you can search the list.
   b. **Reset** will clear the search field and results
   c. If the User is not yet in KAVIS, click ⊕ **Add New User Request** to go to the new user request form. Refer to the 'New User Request' section of this manual for more guidance on this.
   d. The blue buttons next to each User are explained in the next section of this manual, 'Editing a User's Account'.
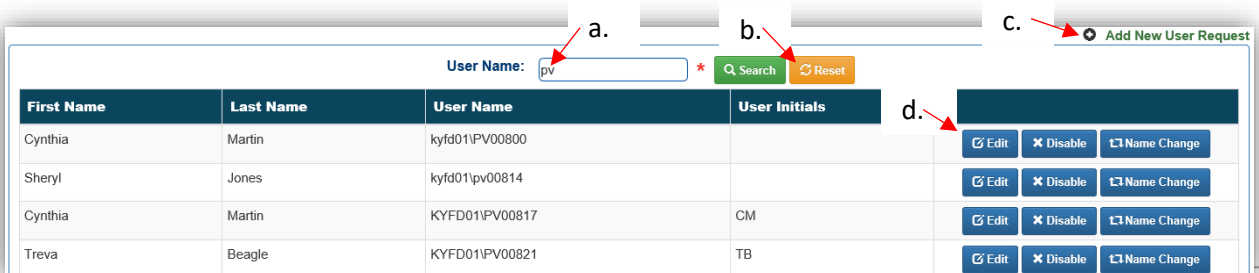
Editing a User's Account

From the User Search results.
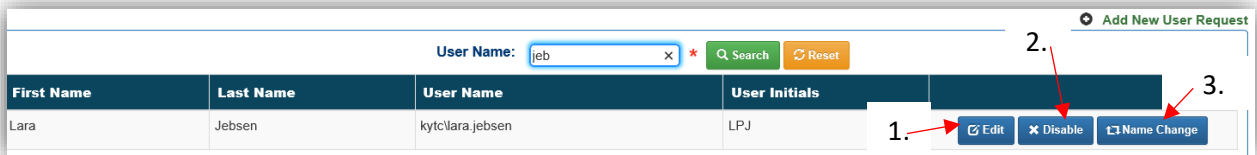
1. If you choose **☑ Edit**, you will be taken to that User's Management Page
   a. You can select or deselect the Permissions and Security Request Information, add a helpful comment, and click **👤 Save**
   b. Details on the Security Request options can be found in the 'New User Request' section of this manual.
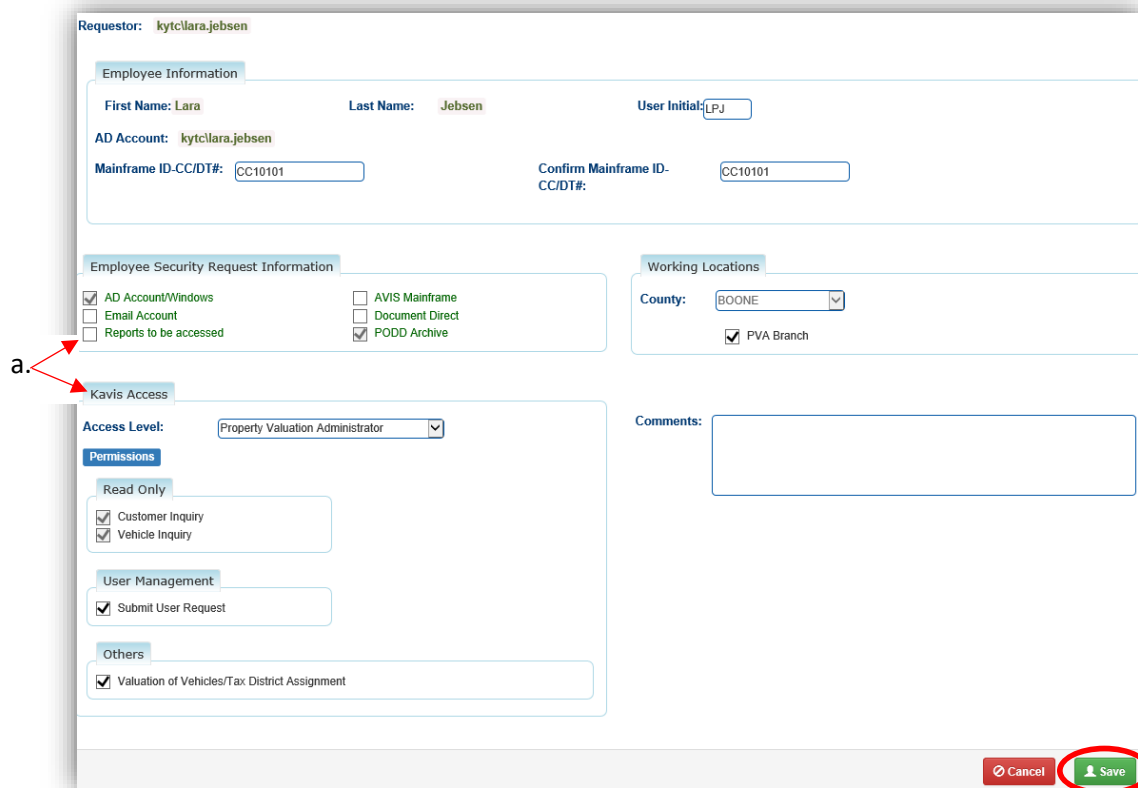
2. If you chose **✖ Disable** from the search results, you will be given the following prompt for comments.
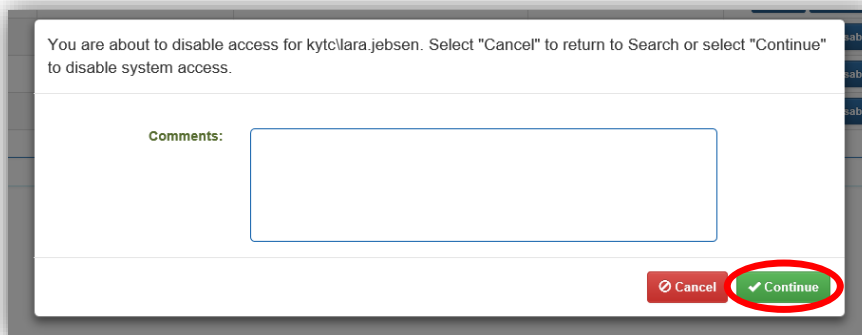
Go to Table of Contents

3. Choosing **⇄ Name Change** from the search results will allow you to request an official change to a User's account.
    a. This is allowed only if you have the 'Submit User Request' Permission.

New User Request

For new employees that need a KAVIS account, this is how you will get them a KAVIS account. Once you submit the request, it will be approved by MVL.

*Note: PVAs must make user requests through contacting DOR. DOR will need the PVA's account number and their first and last name.

1. This feature is only available for those Users who have been granted access to the 'Submit User Request' option.
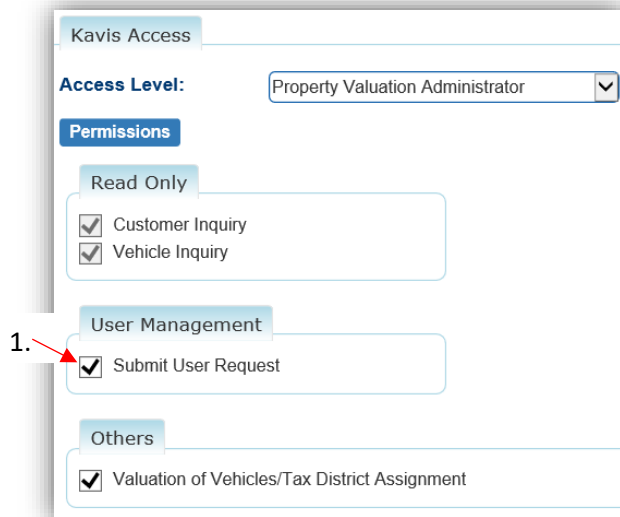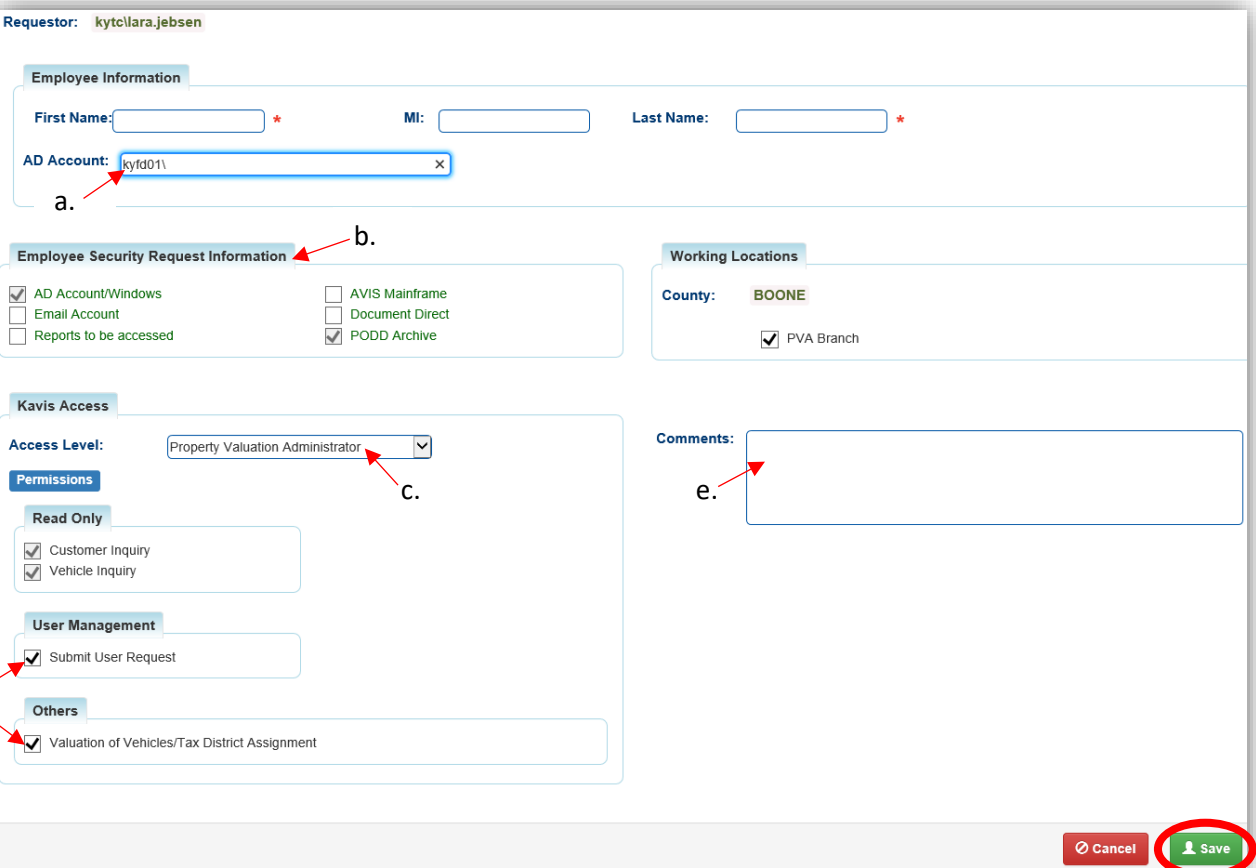
2. From the Home Page, click on 'Employee Management'.
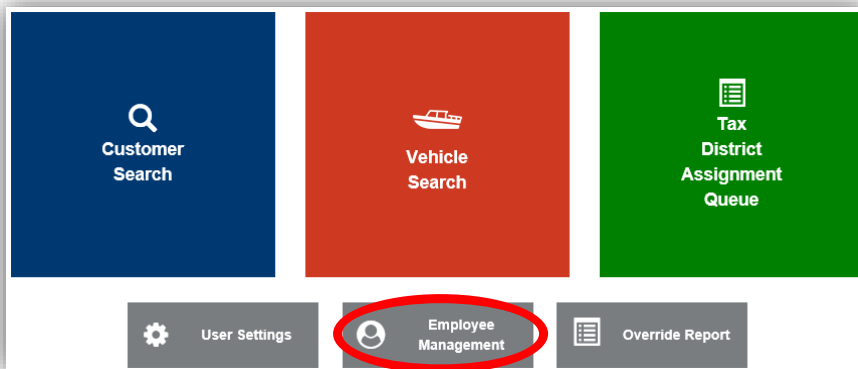
3. In the pop-over, choose 'New User Request'.
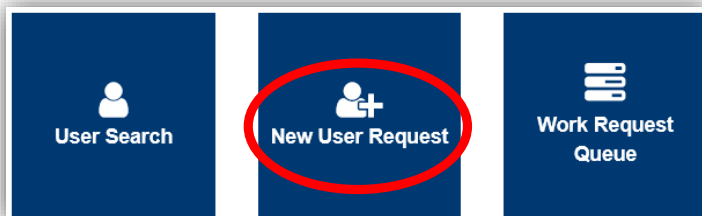
4. Fill out the information, making sure to spell their name correctly
   a. The **AD Account is created by COT** (not KAVIS), contact them if you do not have one. **502-564-7576** (COT helpdesk)
   b. The Employee Security Request Information Section will give the new User the following access.
      i. **AD Accounts/Windows** – User identification number/letter combination for access.
      ii. **Email Account** – User email generated.
      iii. **Reports to be accessed** – Access to reporting historical archives.
      iv. **AVIS Mainframe** – Access to the AVIS Mainframe.
      v. **Document Direct** – Web-based application for report viewing and presentation.
   vi. **PODD Archive** – Access to the PODD Archive.
   c. Choose 'Property Valuation Administrator' from the Access Level dropdown menu
   d. In the Permissions section, choose whether you would like to give this employee access to the available options
   e. Add any helpful comments and click **Save** .

Check the Status of a New User Request

1. Click on ![Employee Management] from the Home Screen.

2. Then ![Work Request Queue] from the pop-over menu.
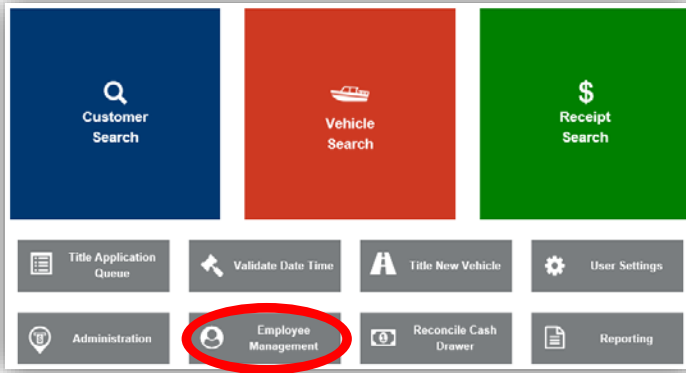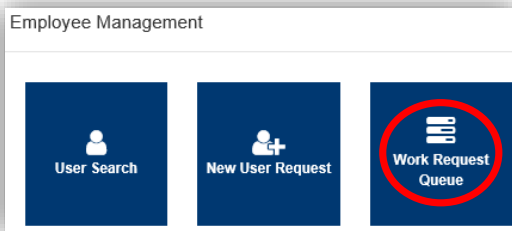

3. To view your submission, click the highlighted blue request number
   a. The status of a request can be 1 of the following options.
      o **Submitted** – This status indicates the user's request has been successfully submitted to MVL for review.
      o **In Progress** – This status indicates the user's request is being reviewed by MVL
   b. To cancel a request made in error, click the ![button] button.

Request Number	Last Name	First Name	Requestor	Request Type	County	Status	Action
REQ181120426	Dwyer	Andy	kytc\lara.jebsen	New User	MVL	Submitted	⊘

3.   a.   b.

⊘ Cancel

DOR Reports

1. From the Home Page, click 'Reports'.
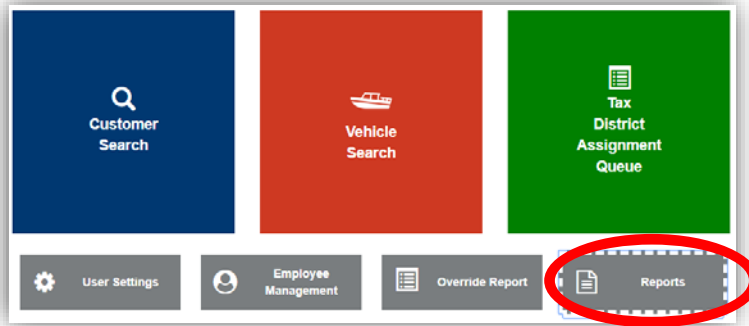
2. Select the settings for the report(s) to be created.
   a. Select the county to create report(s) for.
   b. The current date will be chosen for the Start and End Dates. The dates you select will be determined by the report being selected. See the next section of this manual titled 'Report Descriptions' for guidance on what dates to choose for each specific report.
   c. To view the report, you can either click **View** next to the report or select the checkbox next to the report and click **View Selected**.
   d. Select the checkbox next to the report and click **Print Selected** to send the report to the printer in the dropdown menu.
   e. **Done** will take you back to the Home Page.
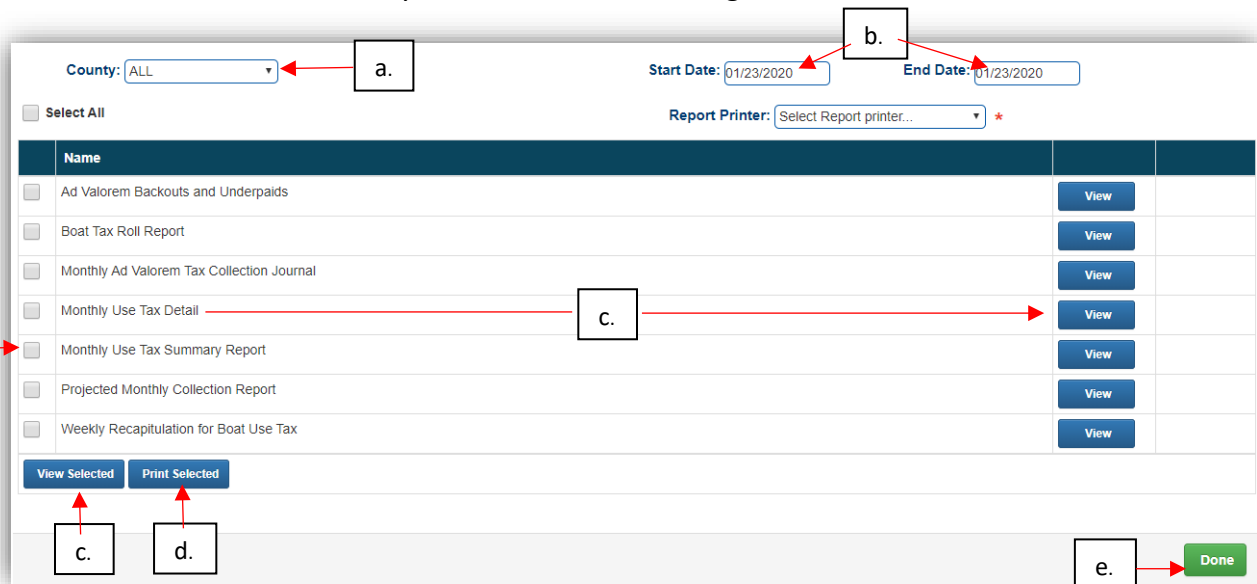
Report Descriptions

Ad Valorem Backouts and Underpaids

This report lists all the Ad Valorem backouts (done via Reversals or PVA adjustments) and underpayments (done by changing the delinquent date for ad val payments).

This is a monthly report; choose the first and last day of the month for the Start and End Dates.

Boat Tax Roll Report

Prints a report that shows the tax collected for the previous year.

Monthly Ad Valorem Tax Collection Journal

This report summarizes the Ad Valorem amount collected for a month split among different jurisdictions and the state. You will be able to view how much amount should be paid to each jurisdiction and how much have to be paid to the state.

This is a monthly report; choose the first day of the month for the Start Date and the last day of the month for the End Date.

Monthly Use Tax Detail

A summary of all use taxes collected in a month.

This is a monthly report; choose the first day of the month for the Start Date and the last day of the month for the End Date.

Monthly Use Tax Summary Report

All use taxes collected in a month based on exemption codes.

This is a monthly report; choose the first day of the month for the Start Date and the last day of the month for the End Date.

Quarterly Out of County Tax Collections Report

All boat taxes collected by outside counties for the county selected.

This is a quarterly report; the start date determines which quarter will be generated.

Projected Monthly Collection Report

Projections of how much Ad Valorem has been collected in a county for a specified month.

This is a monthly report; choose the first day of the month for the Start Date and the last day of the month for the End Date.

Weekly Recapitulation for Boat Use Tax

A summary of how much use tax was collected per day in the selected week.

This is a weekly report; choose a Monday for the Start Date and a Sunday for the End Date.

Override Report

This Statewide Report includes changes to Ad Valorem tax segments that have been made by all DOR and PVA Users to. These changes include any changes to an Override Value, Tax District, Tax Status, and any County of Dockage that has been changed from your County to another.

1. From the Home Page, click 'Override Report'.
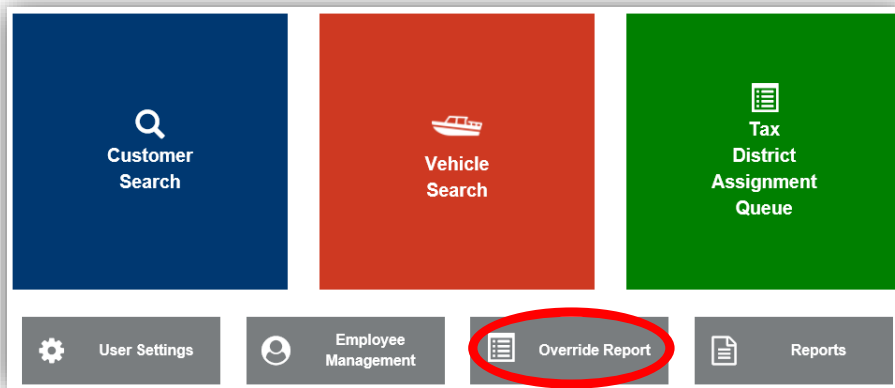
2. Choose the County from the dropdown menu
   a. You can select a specific 1-month time period to search before clicking
   b. For example, if you choose a Start Date of 5/16/19, the latest End Date you will be able to choose is 6/15/19.
   c. You may also filter the results by keyword
      o In this example I entered '88' and the results are highlighted in orange
   d. Clicking on the icon in the Date column will change their display order
   e. The changes made by the User listed is highlighted in yellow.