



kavis



DOR & PVA KAVIS BOAT MANUAL

Updated January 2020



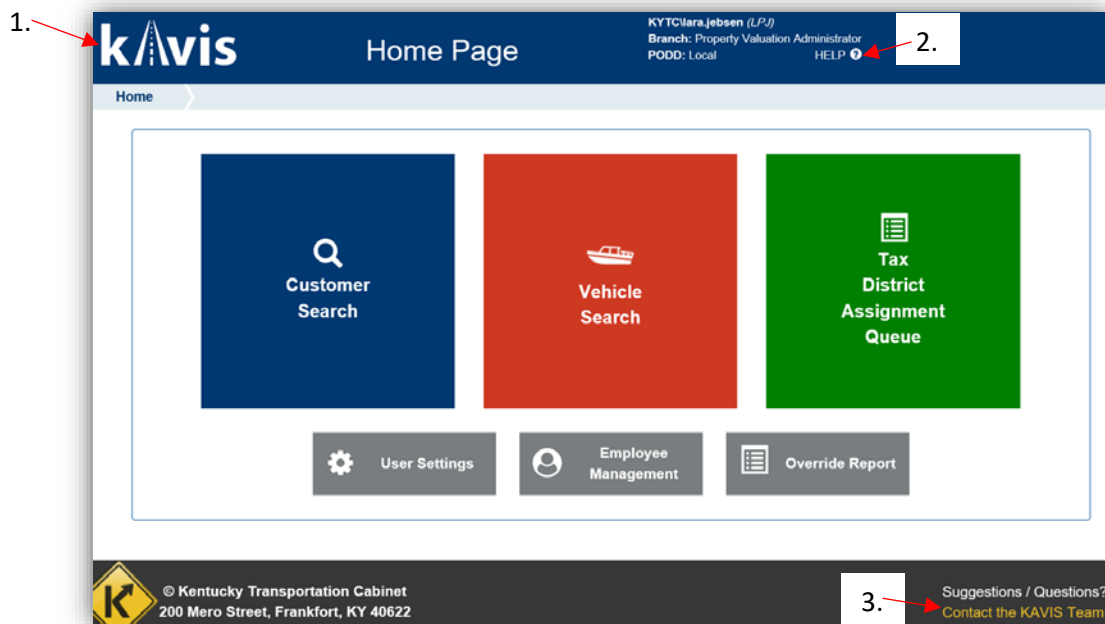
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Home Page Navigation

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.



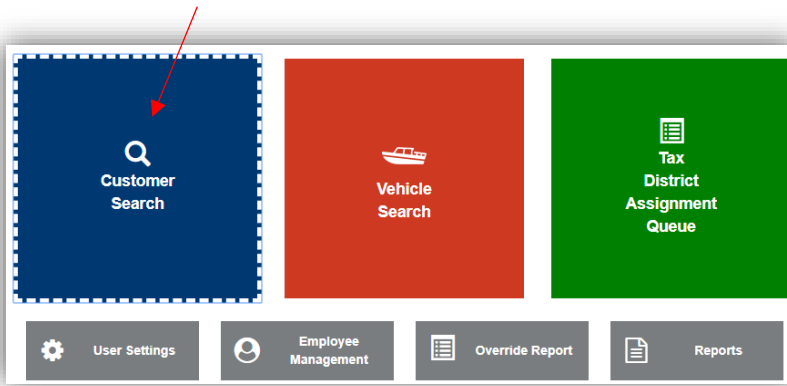
4. If you have a KAVIS account, you are referred to as a User. County Clerks, DOR and MVL employees with KAVIS accounts are also called Users.
 - a. The '[User Management](#)' section of this manual is referring to your personal KAVIS account and the accounts of your coworkers.

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 **Search**.

The screenshot shows a search form with a 'Driver's License Number' input field. A dropdown menu is open, listing search criteria: Driver's License Number, Social Security Number, Individual's Name, Organization's Name, Customer Number, Passport Number, Green Card Number, Visa Number, ITIN, Disabled Placard Number, and Dealer. A red arrow points to the 'Driver's License Number' input field, and another red arrow points to the 'Driver's License Number' option in the dropdown menu. The 'Search' button is circled in red.

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 **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.

The screenshot shows a table of search results. The table has columns: Customer ID, Driver License, Last Name, First Name, Middle Name, Suffix, DOB, SSN, ITIN, Physical Address, County of Residence, Preferred Name, and a 'Select' button. The first row is highlighted in green. A red arrow points to the 'Display Search Criteria' link above the table. Another red arrow points to the 'Select' button of the first row. A third red arrow points to the 'First Name' column header. A fourth red arrow points to the 'Customer ID' of the first row.

Customer ID	Driver License	Last Name	First Name	Middle Name	Suffix	DOB	SSN	ITIN	Physical Address	County of Residence	Preferred Name	Select
001593363		WRIGHT	PHIL				xxx-xx-4223		14658 Us Highway 42 E, VERONA, KY, 41092	BOONE		Select
001300994	W91109249	WRIGHT	PHILIP			09/10/1960	xxx-xx-4223		14658 Us Highway 42 E, VERONA, KY, 41092	BOONE		Select
001655556		WRIGHT	TARA				xxx-xx-6292		117 Deer Trace Dr, WALTON, KY, 41094	BOONE		Select

[Go to Table of Contents](#)

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](#).

The screenshot displays a search results table with columns: Customer ID, Driver License, Last Name, First Name, Middle Name, Suffix, DOB, SSN, ITIN, Physical Address, County of Residence, and Preferred Name. A red arrow labeled '4.' points to the Customer ID '001655556'.

A pop-over window titled 'Customer Data' is open, showing personal information: Last Name: WRIGHT, First Name: TARA, Middle Name: Suffix: Birth Date: County of Residence: BOONE, Preferred Name: Gender: M, Citizenship: United States. It also shows a mobile phone number (859) 647-2799 and an SSN: xxx-xx-6292. At the bottom right of the pop-over, there are 'Select' and 'Cancel' buttons. A red arrow labeled 'a.' points to the 'Select' button, and a red arrow labeled 'b.' points to the 'Cancel' button.

Below the pop-over is a 'Vehicles' section with a tile for a vehicle: 1968 EBBTIDE UNKN, Title# 012290080164, Transfer, KY2023MM, Active - Title Issued, Reg. Expired. A red arrow labeled 'c.' points to the 'View' button on the vehicle tile.

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](#).

MARSHALL, PAMELA SWA **View**

Cust #:000424744
2693 STEVENS RD
PETERSBURG, KY 41080

Action Center

- PVA** Please contact the PVA. There is a problem with a tax segment for the 1984 BASS TRACKER - for the following year(s): 2019, 2018, 2017, 2016, 2015, 2014.
- \$** Ad Valorem taxes are past due for 1967 POLAR CRAFT UNKN.

Vehicles

Boats (2) **Switch to List View**

1984 BASS TRACKER - **M**

Title#: 992600050071
Transfer

KY4774KK
Active - Title Issued
Reg: Expired

View

1967 POLAR CRAFT UNKN **M**

Title#: 930330080060
Original

KY0078BZ
Active - Title Issued
Reg: Expired

View

2. The List View will automatically occur if there are 12 or more vehicles
 - a. The **PVA** 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**.

MARSHALL, PAMELA SWA **View**

Cust #:000424744
2693 STEVENS RD
PETERSBURG, KY 41080

Action Center

- PVA** Please contact the PVA. There is a problem with a tax segment for the 1984 BASS TRACKER - for the following year(s): 2019, 2018, 2017, 2016, 2015, 2014.
- \$** Ad Valorem taxes are past due for 1967 POLAR CRAFT UNKN.

Vehicles

Boats (2) **Switch to Tile View**

View

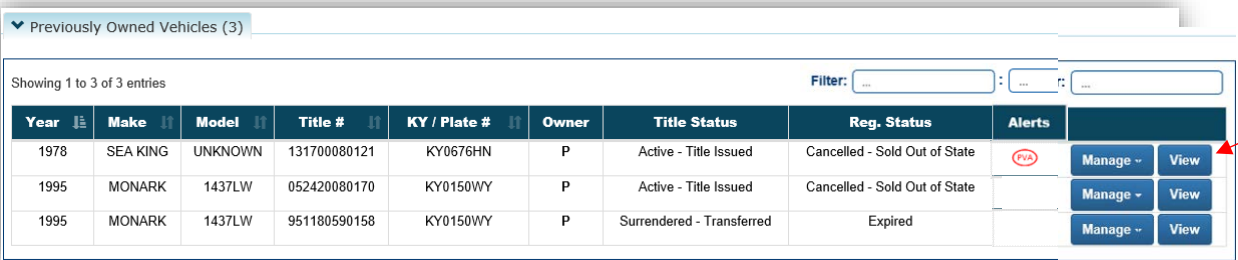
Showing 1 to 2 of 2 entries Filter: ...

Show 10 entries

Select	Year	Make	Model	Title #	KY / Plate #	Owner	Title Type / Status	Reg. Status	Alerts
<input checked="" type="checkbox"/>	1984	BASS TRACKER	-	992600050071	KY4774KK	M	Transfer Active - Title Issued	Expired	PVA
<input type="checkbox"/>	1967	POLAR CRAFT	UNKN	930330080060	KY0078BZ	M	Original Active - Title Issued	Expired	\$


1

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. 

Showing 1 to 3 of 3 entries

Filter: ... : ... :

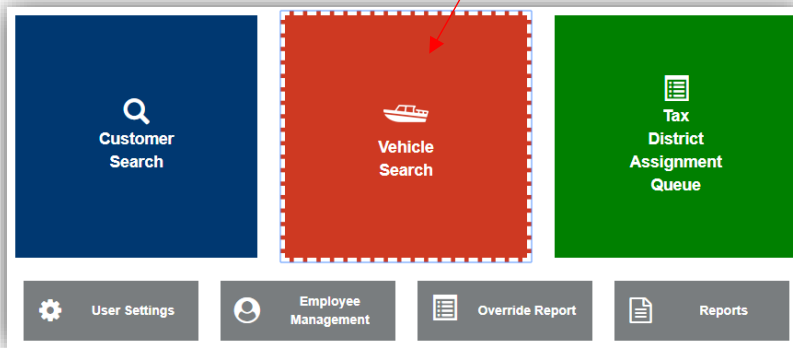
Year	Make	Model	Title #	KY / Plate #	Owner	Title Status	Reg. Status	Alerts	Manage	View
1978	SEA KING	UNKNOWN	131700080121	KY0676HN	P	Active - Title Issued	Cancelled - Sold Out of State		Manage	View
1995	MONARK	1437LW	052420080170	KY0150WY	P	Active - Title Issued	Cancelled - Sold Out of State		Manage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

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 **Search**.

A screenshot of the 'Vehicle Search' form. The 'Search By:' dropdown menu is open, showing options: 'Select One', 'KY Number', 'Title Number' (highlighted), and 'HIN'. The 'Title Number' input field contains '012290080164'. A red arrow labeled '2.' points to the input field. At the bottom right, the 'Search' button is circled in red. Below the form is a table with search results.

KY Number	Title Number	Title Status	Customer ID	Name	Address	Vehicle Type	Year	Make	Model	
KY2023MM	012290080164	Active - Title Issued	001655556	WRIGHT, TARA	117 Deer Trace Dr, WALTON, KY 41094	All Vehicles	1968	EBBTIDE	UNKN	Select

3. From the search results, click **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.

Viewing 1 of 1 Titles

Customer ID	Driver License	Customer Name	SSN/FEIN	Address	Begin Tax Exempt Date
000424744	M93071712	MARSHALL, PAMELA SWA	xxx-xx-8231	2693 STEVENS RD, PETERSBURG, KY 41080-9337 BOONE	
001616379		MARSHALL, CHUCK	xxx-xx-3363	2693 Stevens Rd., BURLINGTON, KY 41005 BOONE	

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.

Customer Data

Personal Information

LAST NAME: MARSHALL
 FIRST NAME: PAMELA
 MIDDLE NAME: SWA
 SUFFIX:
 Birth Date: 04/24/1955
 County of Residence: BOONE
 Preferred Name:
 Gender: F
 Citizenship:

Phone
No phone data.

Identification
 Driver's License: KY M93071712
 SSN: xxx-xx-8231

Address
 Physical
 2693 STEVENS RD
 PETERSBURG, KY 41080-9337
 BOONE

Alias
No Alias data.

Vehicles

1984 BASS TRACKER -
Title# 992600050071
Transfer

KY4774KK
Active - Title Issued
Reg. Expired

[View](#)

1967 POLAR CRAFT UNKN
Title# 930330080060
Original

KY3078SZ
Active - Title Issued
Reg. Expired

[View](#)

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.

Viewing 6 of 6 Titles

Seq.	Title Number	Primary Owner	Address	Title Status	Issue Date	Last Action Date
6	190460085002	LEMOND, SALLY SIMS	1106 Merrell Rd., BURLINGTON, KY 41005	Application		02/15/2019
5	141570220029	MEADOWS, CLARENCE D	224 Mays Rd, SANDY HOOK, KY 41171	Surrendered - Transferred	06/19/2014	02/15/2019
4	130220450008	WALK, KENNETH	3874 State Route 1458, ASHLAND, KY 41102	Surrendered - Transferred	02/12/2013	06/06/2014
3	130070340344	DAVENPORT, JULIE	2161 Westmont Ct, LEXINGTON, KY 40513	Surrendered - Transferred	01/08/2013	01/22/2013
2	061600340312	DAVENPORT, JULIE	2161 Westmont Ct, LEXINGTON, KY 40513	Surrendered - Transferred	07/15/2006	01/07/2013
1	042170340239	FISTER, JOHN	1136 Aldridge Way, LEXINGTON, KY 40515	Surrendered - Transferred	09/14/2004	06/09/2006

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.

Title

Status: Active - Title Issued

Type: Original **State Fee:** \$2.00
Title #: 930330080060 **Clerk Fee:** \$4.00
Use Tax: \$0.00

Registration Information

Status: Expired

Type: Ad Valorem **County:** BOONE
Reg. Date: 04/27/1995 **Decal #:** E006502
Exp. Date: 04/30/1996 **Prior Decal #:** B138212

Remarks:
Comments:

F&W State Fee: \$11.00
KYTC State Fee: \$0.00
Boat Safety Fee: \$0.00
Clerk Fee: \$3.00

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.

Ad Valorem

2019

[Add New Ad Valorem Segment](#)

Transaction ID: 031735258

County Paid: County of Dockage: BOONE

Tax Status: Taxable Tax District: 88

Vehicle Assessed Value: \$0.00 Vehicle Override Value:

Motor Assessed Value: \$0.00 Motor Override Value:

Total Taxable Value: \$0.00

Ad Valorem Due: \$0.00
Penalty Due: \$0.00
Interest Due: \$0.00
Clerk Fee: \$2.00
Total Amount Due: \$2.00

[Recalculate](#) [Cancel](#) [Save](#)

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

Vehicle Information

Year: 1967 Make: POLAR CRAFT Model: UNKN
KY Number: KY0078BZ HIN: 36197

Vehicle Attributes

County of Dockage: BOONE
Boat Type: Other - Utility Hull Material: Fiberglass
Engine Drive: Outboard Propulsion: Propeller
Length: 14' 1" Beam: 4' 1"
Occupant Capacity: 4 Weight Capacity:
Number of Toilets: Toilet Type:
Primary Use: Pleasure Number of Motors: 1
Brand:

Motor(s)

Year	Make	Horsepower	Serial Number	Fuel Type
	NONE		KY0078BZ	Gas

Situs Address

No Situs Address.

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.

Number	Cntrl Number	Action Date	Action Description	Amount	User
24345469		02/15/2019 01:52 pm	Title Transfer		kytc\lara.jebesen
24345465		02/15/2019 01:42 pm	Advalorem Action		kytc\lara.jebesen
22965600	1700206120	02/05/2019 03:00 pm	Advalorem Action		kytc\lara.jebesen
20104349		02/05/2019 03:00 pm	Title Transfer		kytc\lara.jebesen
16246742		12/31/2018 07:00 pm	Create Annual Property Tax Record		BF2

- 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.

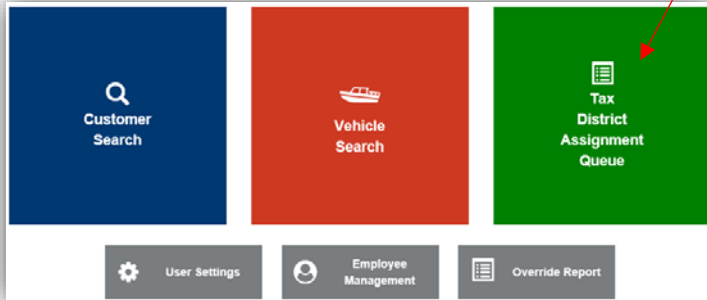
Previous
Viewing Vehicle state as of 02/05/2019 03:00 pm
Reset
Next

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.

Filter By: Display All Missing Value Missing Tax District

Search:

Showing 1 to 100 of 924 entries

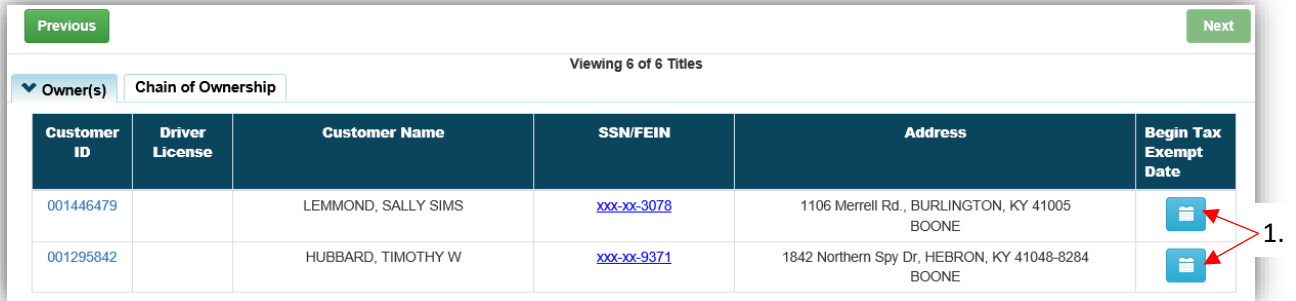
Title Number	KY/Plate #	Primary Owner	Year	Make	Model
▶ 193171005003	KY0901YP	PARKER, WILLARD	1954	Honda	Boat
▶ 193160345002	KY1102Y	VICKERS, ROBERT	1974	ENSGN	N/A
▶ 193100085004	KY0145MG	FRAKES, JOYCE E	1995	LANDAU	1456
▶ 193100085003	KY0365RD	CHAMBERS, CORY ANSON	1994	FOUR WIINS	258 VISTA
▶ 193100085002	KY0767EK	CHALK, JOSEPH ROY	2007	SUNDOLPHIN	X2
▶ 193100085001	KY0097AV	MARANESI, ROSEMARY GIZZI	1988	SEA RAY	230WE
▶ 193090085004	KY0744WT	SMILEY, CHARLES L	2015	TRACKER BO	PGV16
▶ 193090085002	KY0536AB	SMITH, ALBERT E	2006	BASS TRACKER	ALL FISH
▶ 193010085003	KY0901VR	SAMPSON, WAYNE K	2020	Honda	Boat
▶ 193010085002	KY0901VP	SMITH, ALBERT E	1234	12341	1234
▶ 193010085001	KY0901VN	SMITH, ROBERT CHRISTOPHER	1987	Bob's	Boat
▶ 192950085003	KY0901UC	JOHNSON, ELMER	2010	Makerdo	Modeldont
▶ 192950085002	KY0901TZ	JACKSON, EDWARD	2000	Maker	Modeler
▶ 192950085001	KY0574SV	JOHNSON, BARBARAA	1999	SEADOO	5885GTI
▶ 192940085012	KY0647WA	SHIPP, JUSTIN E	1979	RINKER	UNKNOWN
▶ 192940085011	KY1752UU	PATTERSON, JOSEPH	1986	CHAPARRAL	N/A
▶ 192940085010	KY0773MD	CHARLES, KRISTA	1997	WELLCRAFT	ECLIPSE
▶ 192940085009	KY0527W	LEWIS, SANDRAA	1972	BONITO	BOW RIDER
▶ 192940085008	KY0762LU	MUDMAN, KYLE	2008	TRACKER	PROTEAM

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.

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.

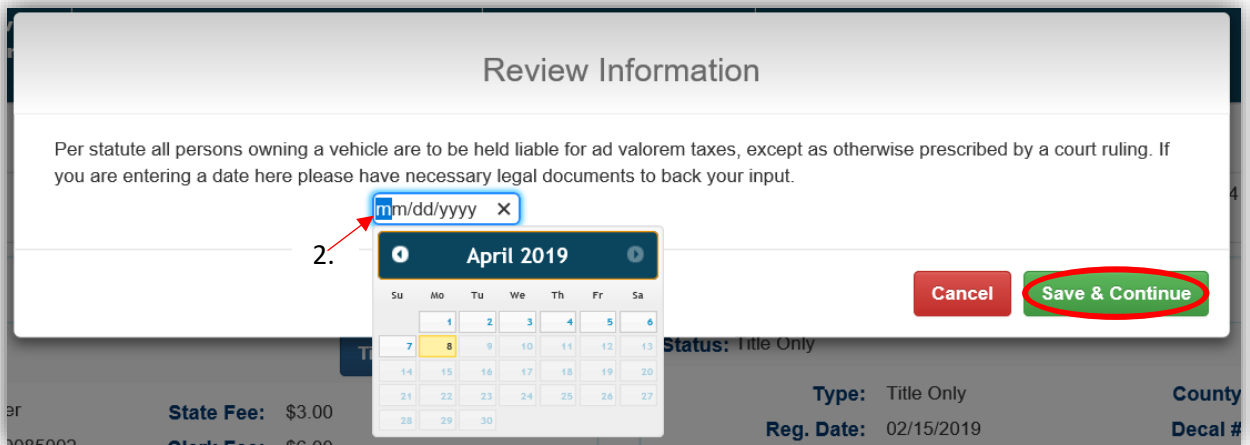
1. On the Vehicle Summary Page, select the 'Begin Tax Exempt Date' calendar icon.



The screenshot shows a table with the following columns: Customer ID, Driver License, Customer Name, SSN/FEIN, Address, and Begin Tax Exempt Date. Two rows of customer data are visible. Red arrows point to the calendar icons in the 'Begin Tax Exempt Date' column of both rows, with a '1.' next to the second arrow.

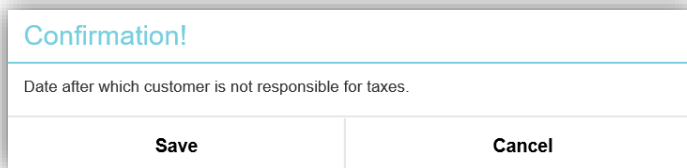
Customer ID	Driver License	Customer Name	SSN/FEIN	Address	Begin Tax Exempt Date
001446479		LEMMOND, SALLY SIMS	xxx-xx-3078	1106 Merrell Rd., BURLINGTON, KY 41005 BOONE	
001295842		HUBBARD, TIMOTHY W	xxx-xx-9371	1842 Northern Spy Dr, HEBRON, KY 41048-8284 BOONE	

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.



The screenshot shows a 'Review Information' pop-over with a text input field containing 'm/d/yyyy'. A calendar for April 2019 is open, showing the date '8' selected. A red arrow points to the input field with a '2.' next to it. The 'Save & Continue' button is circled in red. Below the calendar, there are fields for 'Status: Title Only', 'Type: Title Only', 'County', 'State Fee: \$3.00', 'Reg. Date: 02/15/2019', and 'Decal #'. A 'Cancel' button is also visible.

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




The confirmation message box has the following content:

Confirmation!

Date after which customer is not responsible for taxes.



Save **Cancel**

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

Previous Next

Viewing 6 of 6 Titles

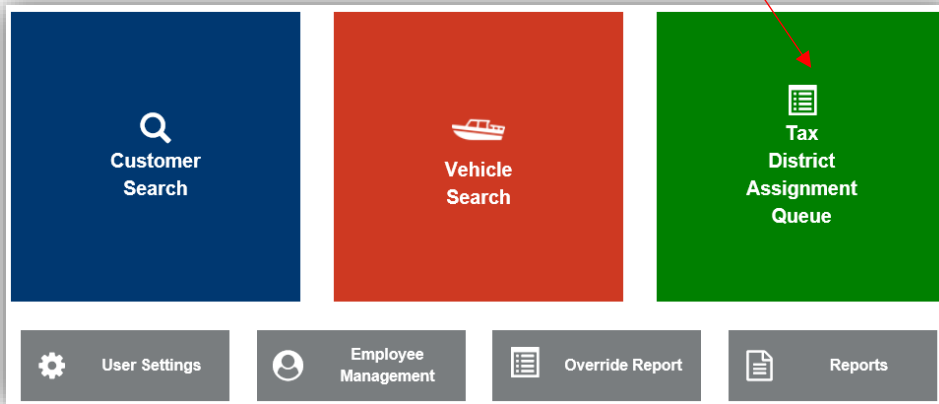
▼ Owner(s) Chain of Ownership

Customer ID	Driver License	Customer Name	SSN/FEIN	Address	Begin Tax Exempt Date
001446479		LEMMOND, SALLY SIMS	xxx-xx-3078	1106 Merrell Rd., BURLINGTON, KY 41005 BOONE	02/04/2019 
001295842		HUBBARD, TIMOTHY W	xxx-xx-9371	1842 Northern Spy Dr, HEBRON, KY 41048-8284 BOONE	

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.

The screenshot shows the 'FRANKLIN' page with 'Total Ad Valorem Records: 778'. The 'Filter By' section has radio buttons for 'Display All', 'Missing Value', and 'Missing Tax District'. A search field is labeled 'b.'. The table shows records with columns: Title Number, KY/Plate #, Primary Owner, Year, Make, and Model. A record is highlighted with a red arrow labeled 'c.'. The page shows 'Showing 1 to 100 of 268 entries' and pagination controls (Previous, 1, 2, 3, Next). A red arrow labeled 'a.' points to the 'Filter By' section.

Title Number	KY/Plate #	Primary Owner	Year	Make	Model
193330375001	KY0302LX	JACKSON, JAMES M	1985	COLEMAN CRAWFORD	C5931A
193310375001	KY0907AJ	JACKSON, ANNA T	1960	Makedo	Modeldont
193260375001	KY0906ZB	HOUCHIN, LESLIE LEE	1973	CHRYSLER	HOUSEBOAT
193250035001	KY0800SH	LEE, WINCE EUGENE JR	1992	WELLCRAFT	SCARAB
193230375003	KY0075YD	WALKER, DANIEL K	1992	SMOKERCRAFT	SUNSPORT
193220375001	KY0906WS	DAYS BOAT SALES	2014	RANGER	2050LS
193160375001		FRANKLIN, JAMES COLEMAN	1998	Basstender	10 2 Dark

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.

1.

a.

Ad Valorem	\$20.65
Due:	
Penalty Due:	\$2.07
Interest Due:	\$4.53
Clerk Fee:	\$2.00
Total Amount Paid	\$29.25

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.

2.

Ad Valorem	\$20.65
Due:	
Penalty Due:	\$2.07
Interest Due:	\$4.53
Clerk Fee:	\$2.00
Total Amount Paid	\$29.25

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**.

3.

Cancel Save

a.

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).

4.

* 2018 tax segment has been adjusted and is pending Clerk action

Undo Pending Changes Cancel Save

a.

5. The Tax Status of 'Taxable' will allow you to choose the Tax District

- The Tax District options will be the districts in your county.
- Enter an Override value for the Vehicle and the Motor (if applicable)
- Click **Recalculate** to see the changes in the Total Amount Due (this is optional)
- Clicking **Cancel** will undo all changes. Click **Save** to commit to these changes.

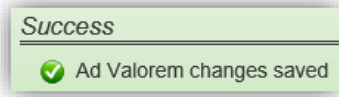
a.

b.

c.

d.

6. A Success message will show at the top of the Vehicle Summary Screen.



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**.

The screenshot shows the 'Ad Valorem' section of a vehicle summary page. At the top left, there is a dropdown menu for the year, currently set to '2018'. To the right of this menu are two buttons: 'Edit' and 'Add New Ad Valorem Segment'. A red arrow points to the 'Add New Ad Valorem Segment' button, with the number '1' next to it. Below the buttons, there are several fields for transaction details: Transaction ID (033282564), County Paid (BOONE), County of Dockage (BOONE), Tax Status (Taxable), Tax District (05), Vehicle Assessed Value (\$195.00), Motor Assessed Value (\$90.00), and Override Value fields. On the right side, there are fields for Ad Valorem Due (\$3.58), Penalty Due (\$0.00), Interest Due (\$0.00), Clerk Fee (\$0.00), and Total Amount Paid (\$3.58). At the bottom right, there are three buttons: 'Recalculate', 'Cancel', and 'Save'.

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.

The screenshot shows the 'Ad Valorem' section with the year dropdown menu open, displaying a list of years from 2009 to 2020. A red arrow points to the year '2009', which is highlighted, and is labeled 'a.'. The 'County of Dockage' dropdown menu is also open, showing 'BARREN' selected, with a red arrow pointing to it labeled 'b.'. The 'Tax District' dropdown menu is set to '88' and has an information icon. The 'Total Amount Due' is now \$0.00. The 'Recalculate', 'Cancel', and 'Save' buttons are visible at the bottom right.

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.

Ad Valorem

2009

Transaction ID:

County Paid: Exempted- No Tax Due
Non-Taxable Junked
Non-Taxable Transferred out of state
Tax Status: Non-Taxable Current Year
Taxable

Vehicle Assessed Value: \$0.00

Motor Assessed Value: \$0.00

County of Dockage: BOONE

Tax District: 99

Vehicle Override Value:

Motor Override Value: 0

Total Taxable Value: \$0.00

Ad Valorem Due: \$0.00
Penalty Due: \$0.00
Interest Due: \$0.00
Clerk Fee: \$0.00
Total Amount Due: \$0.00

Cancel Save

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 **Recalculate** to see the changes in the Total Amount Due
 - c. **Save** will finalize the adjustment.

Ad Valorem

2009

Transaction ID:

County Paid:

Tax Status: Taxable

Vehicle Assessed Value: \$0.00

Motor Assessed Value: \$0.00

County of Dockage: BOONE

Tax District: 11

Vehicle Override Value: 1500

Motor Override Value: 100

Total Taxable Value: \$1,600.00

Ad Valorem Due: \$21.76
Due: \$2.18
Penalty Due: \$2.18
Interest Due: \$36.26
Clerk Fee: \$2.00
Total Amount Due: \$62.20

Recalculate Cancel Save

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.

Ad Valorem

2020

Transaction ID: 028782528

County Paid:

County of Dockage: BREATHITT

The County of Dockage is being updated. Please add the Situs address.

Vehicle has a Situs Address

Situs Address

* Location or Address is required!

Location:

Address 1:

Address 2:

City is required!

City:

State: Kentucky * Zip:

Zip Code is required!

Tax Status: Taxable

Tax District: 88

Vehicle Assessed Value: \$4,030.00

Vehicle Override Value:

Motor Assessed Value: \$4,030.00

Motor Override Value:

Total Taxable Value: \$8,060.00

Ad Valorem Due: \$0.00

Penalty Due: \$0.00

Interest Due: \$0.00

Clerk Fee: \$0.00

Total Due: \$0.00

Recalculate Cancel Save

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

County of Dockage: BREATHITT

The County of Dockage is being updated. Please add the Situs address.

Vehicle has a Situs Address

Situs Address

Location: Don's Marina

Address 1:

Address 2:

City:

State: Kentucky Zip:

Tax District: 88

Vehicle Override Value:

Motor Override Value:

Total Taxable Value: \$8,060.00

Ad Valorem Due: \$0.00

Penalty Due: \$0.00

Interest Due: \$0.00

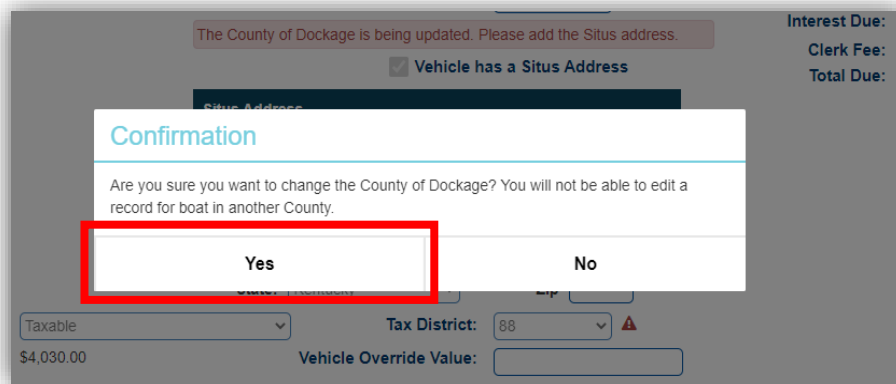
Clerk Fee: \$0.00

Total Due: \$0.00

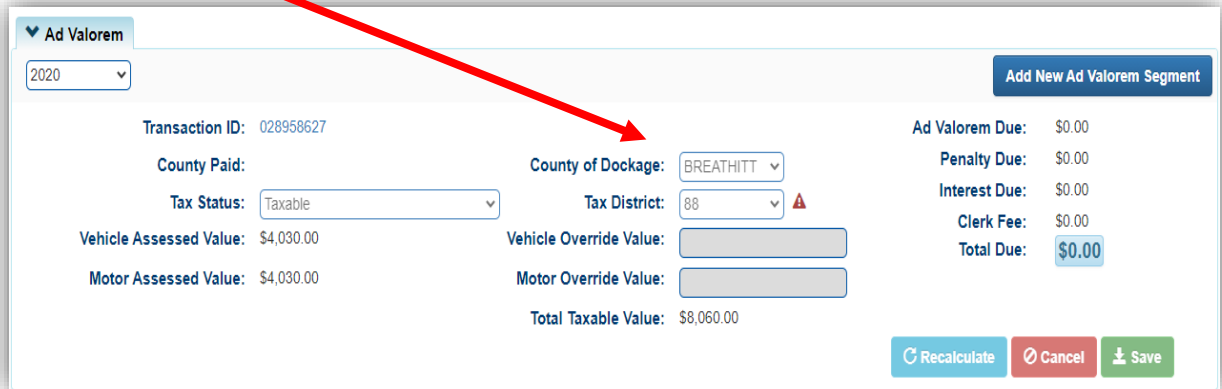
Recalculate Cancel Save

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'.

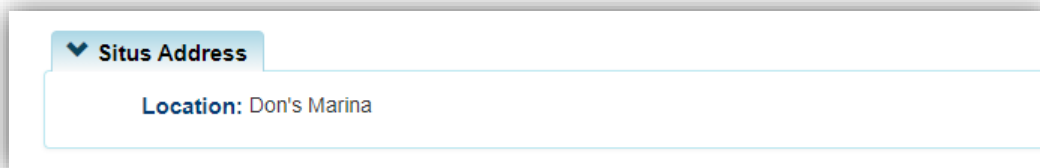


4. The "County of Dockage" will change and the "Tax District" will be set to 88.



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.

- 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.

4.

Customer ID	Driver License	Customer Name	SSN/PEN	Address	Begin Tax Exempt Date
001067320		CORLE, RONALD J	xxx-xx-3803	2943 Watts Rd, BURLINGTON, KY 41005-9756 BOONE	

Customer Data

Personal Information

Last Name: CORLE
First Name: RONALD
Middle Name: J
Suffix:
Birth Date:
County of Residence: BOONE
Preferred Name:
Gender: M
Citizenship: United States

Phone

Mobile: (606) 647-0895

Identification

SSN: xxx-xx-3803

Address

Physical
2943 Watts Rd
BURLINGTON, KY 41005-9756
BOONE

Alias

No Alias data.

Select Cancel

Vehicles

No PVA issues

2010 G3 V170T
Title#: 171250190048
Transfer

KY0581RJ
Active - Title Issued
Reg. Active
View

1975 CHRYSLER N/A
Title#: 991480000094
Transfer

KY7907Z
Active - Title Issued
Reg. Expired
View

a.

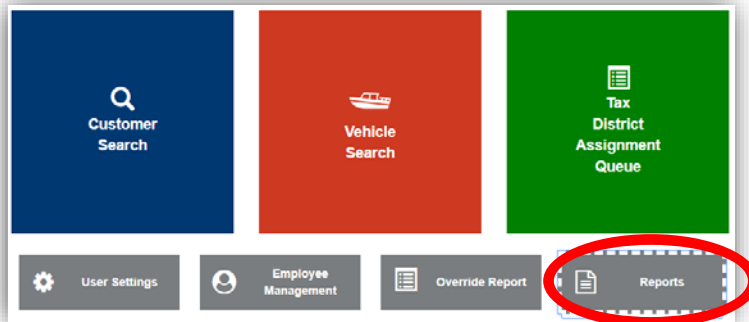
PVA Reports

***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.

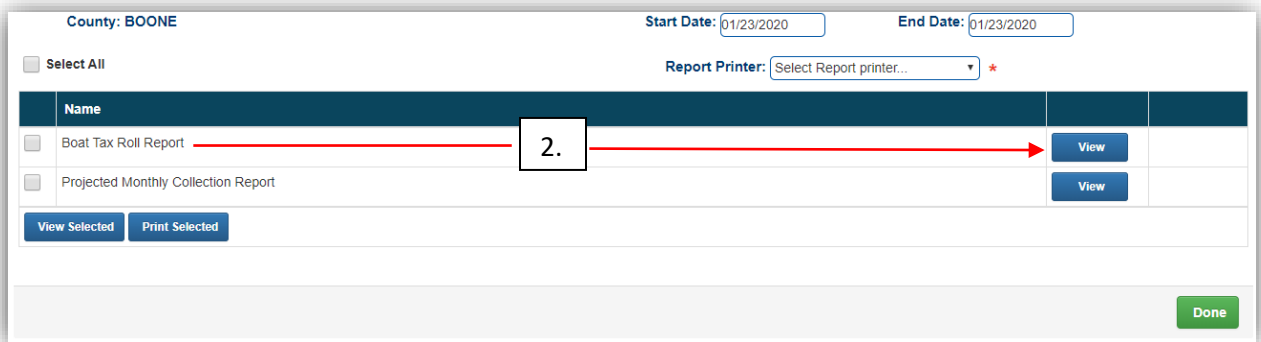
Boat Tax Roll Report

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.

Boat Tax Roll Report

County: BOONE Tax Year: 2018

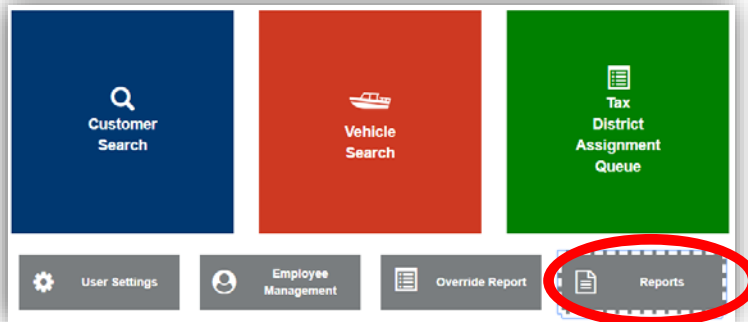
** This report contains data as of January 1st
** This report contains Boat Related Data

Owner Name	Address	KYNumber	Title Number	Boat Attributes						Motor Attributes			
				Make	Model Year	Model	Length	Propulsion	Value	Make	Model Year	Horse Power	Value
101 MARINE LLC		KYD477YP	062960080003	SKEETER	2005	SL190	188.6m	Propeller	\$1,510.00	YAMA	2005	150	\$3,935.00
1ST NATIONAL BANK OF SW	P O Box 3240, ST. JOSEPH, KY, 64502	KYD413AG	042430080134	CRESTLINE R	2002	1882	188.1m	Propeller	\$2,531.00	MERC	2003	50	\$1,750.00
7 WILSON TRUCKING	5437 Country Hills Ln, LINCOLN, KY, 41091	KY5132RR	962780080088	CODIA	1988	NA	188.1m	Propeller	\$1,311.00	MERC	1988	130	\$0.00
AARON DAVID	26 Needmore St, WALTON, KY, 41094	KYD413AM	031840080196	LNK	1970	NONE	148.1m	Propeller	\$0.00	LNK		0	\$0.00
ABDON, AARON	Po Box 105, PETERSBURG, KY, 41080	KYD697NA	141500080003	BOMBARDIER	1995	SEA DOO	98.1m	Propeller	\$428.00	BOMB	1995	33.6	\$0.00

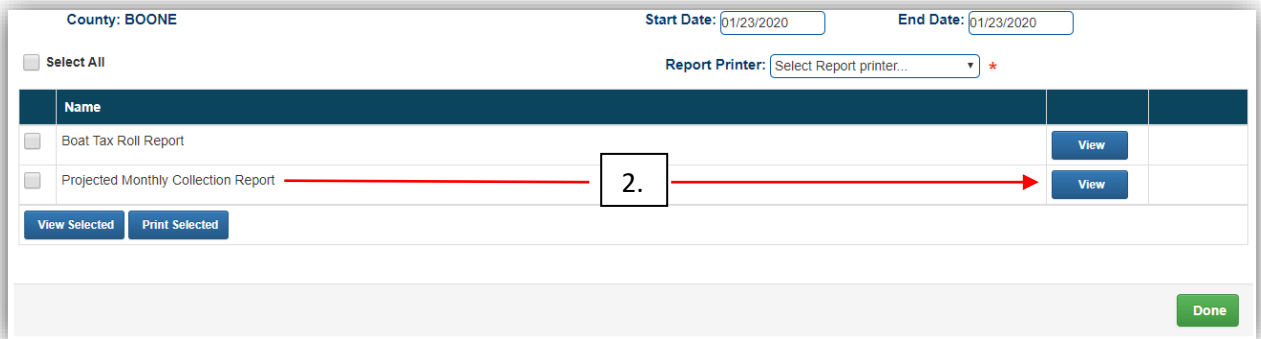
Projected Monthly Collection Report

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.

**Projected Monthly Collections for Motor Boats
Advalorem Tax Distributions by Jurisdiction
For 2020**

County: BOONE
Date: 01/23/2020

Tax Code	Jurisdiction Description	Assessed Values	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Totals/ Year
001	GENERAL	16,671	0	0	0	23.67	0	0	0	0	0	0	0	0	23.67
002	LIBRARY	16,671	0	0	0	5	0	0	0	0	0	0	0	0	5
003	HEALTH	16,671	0	0	0	3.55	0	0	0	0	0	0	0	0	3.55
004	EXT SERVICE	16,671	0	0	0	3	0	0	0	0	0	0	0	0	3
F9	FD_FLORENCE	16,671	0	0	0	25.01	0	0	0	0	0	0	0	0	25.01
SC	CO SCHOOL	16,671	0	0	0	82.85	0	0	0	0	0	0	0	0	82.85
LOCAL JURISDICTIONS			0	0	0	143.09	0	0	0	0	0	0	0	0	143.09
STATE TAX		16,671	0	0	0	75.02	0	0	0	0	0	0	0	0	75.02
TOTAL			0	0	0	218.11	0	0	0	0	0	0	0	0	218.11

Total Vehicles For County <BOONE> : 1
District 88 Assessed Value for County <BOONE>: 0
Total District 88 Vehicles: 0

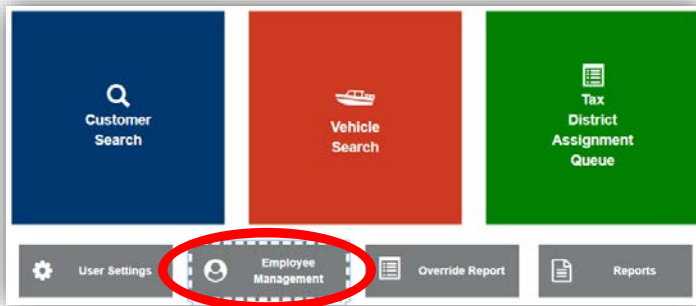
Further Actions for Department of Revenue

User Management

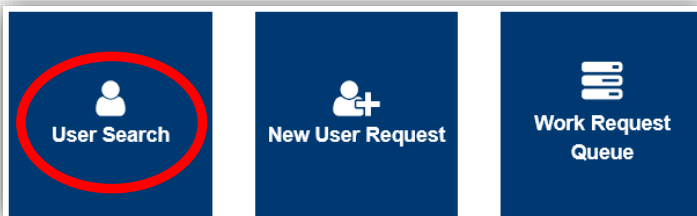
Searching for a User's Account



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

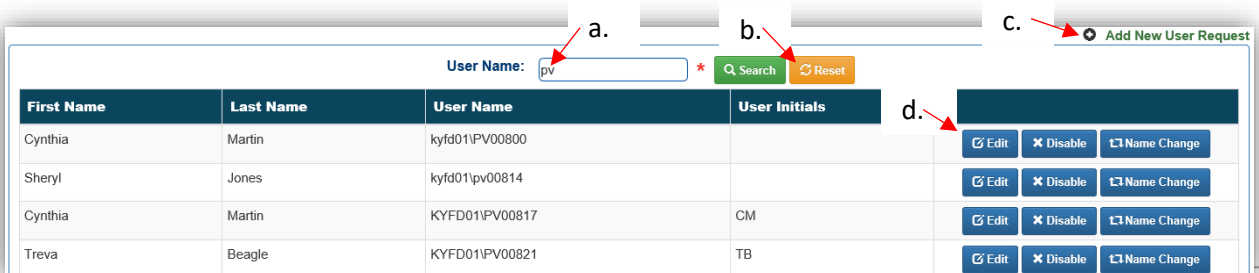
1. From the Home Page, click on 'Employee Management'.



2. In the pop-over, choose 'User Search'.

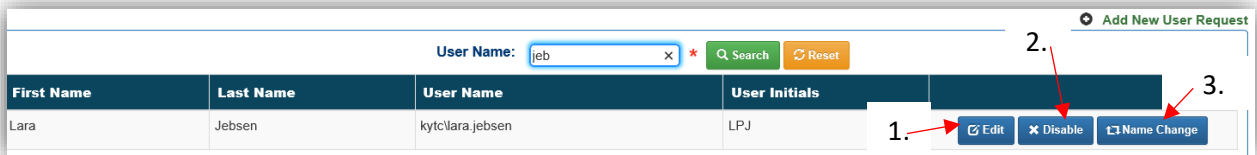


3. In the search field you must search for their User Name. This might be their name (firstname.lastname) or their PV number (pv49765).
 - a. If you aren't sure of their User Name, and they aren't in the results when you search their name, search for 'pv' and you will get a list of all Users with PV 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](#)'.

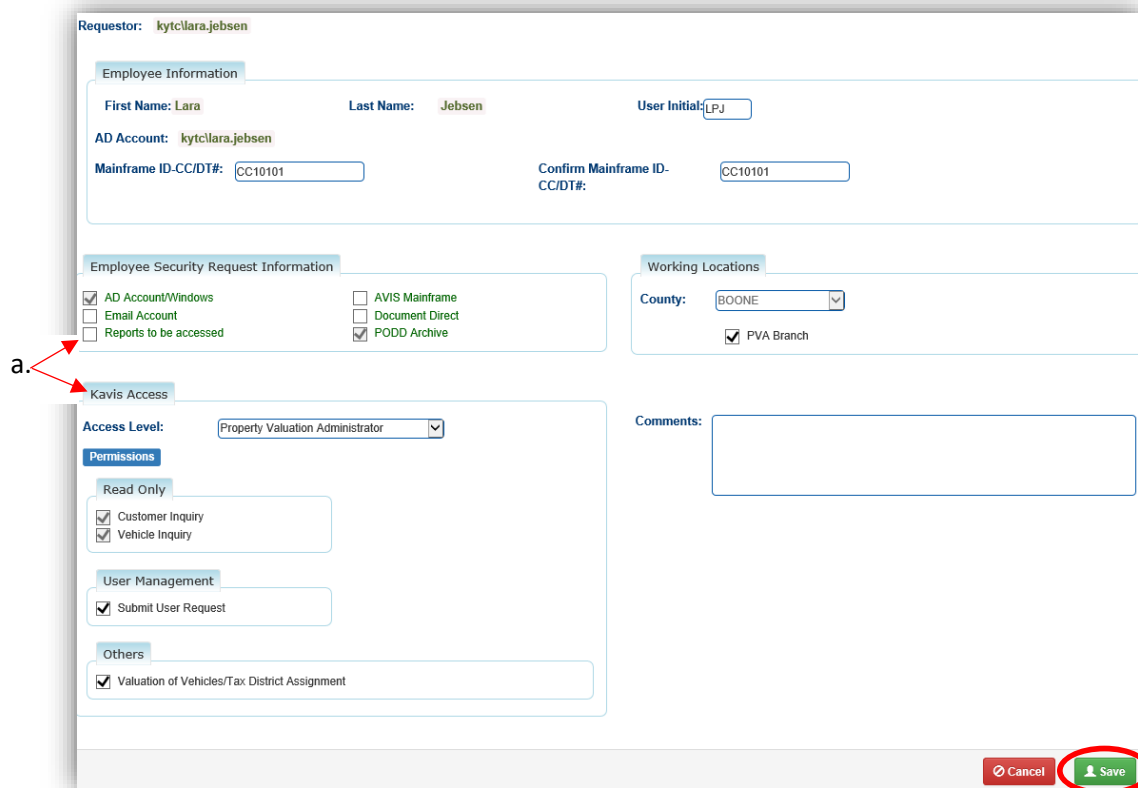


Editing a User's Account

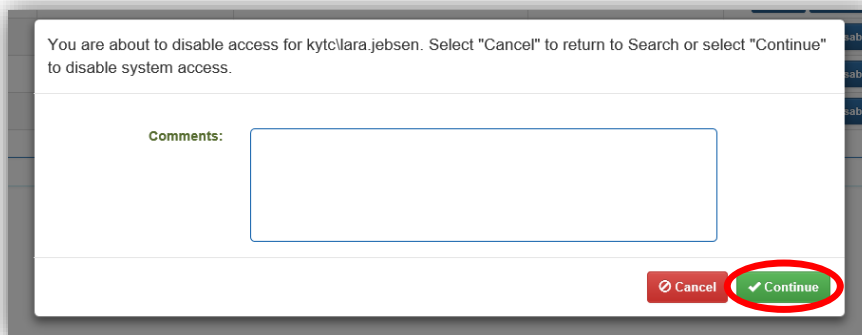
From the User Search results.



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.

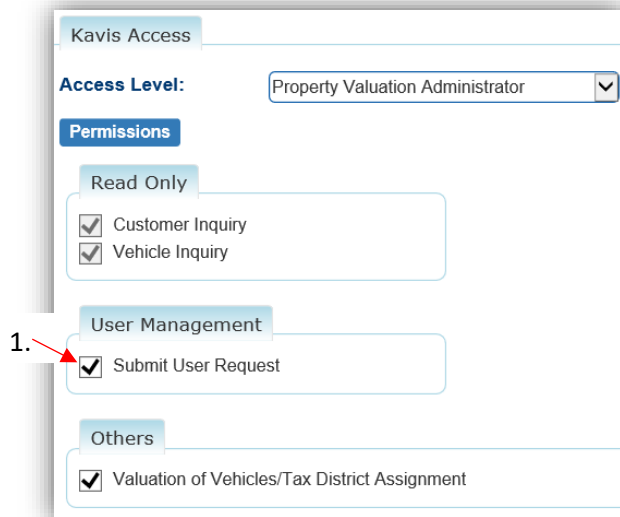
The screenshot shows a web form for requesting a name change. At the top, it identifies the requester as 'kytclara.jebesen'. Below this is a section titled 'Employee Information' containing fields for 'First Name' (Lara) and 'Last Name' (Jobsen), both marked with a red asterisk. It also displays 'AD Account: kytclara.jebesen' and 'Mainframe ID-CC/DT#: CC10101'. The 'Name Change Reason' section features a dropdown menu with options: 'Select One...', 'Marriage', 'Divorce', 'Legal Name Change', and 'Correction'. A red arrow points to the dropdown, and a red '4.' is next to it. Below the dropdown is a 'Comments' text area, also marked with a red asterisk. At the bottom right, there are 'Cancel' and 'Save' buttons, with the 'Save' button circled in red.

New User Request

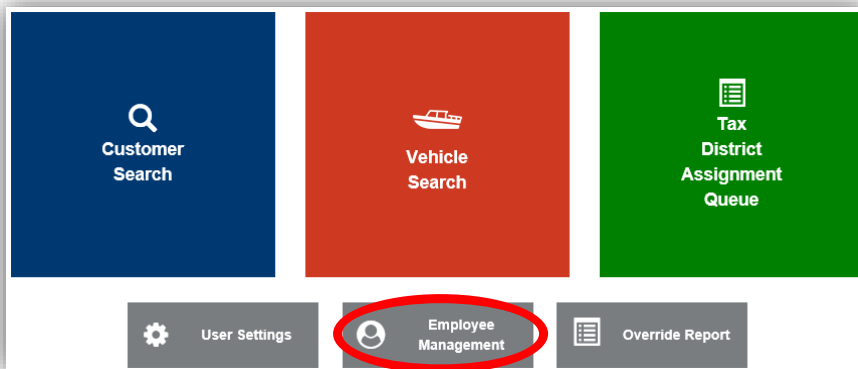
For new employees that need a KAVIS account, this is how you will get them a KAVIS account. Once you submit the request, it will be approved by MVL.

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

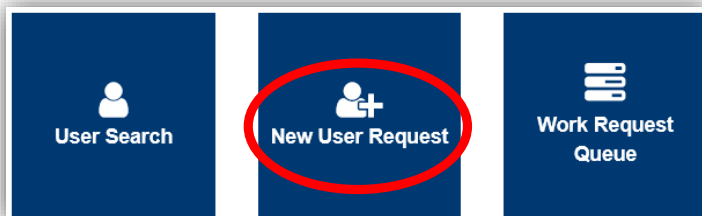
1. This feature is only available for those Users who have been granted access to the 'Submit User Request' option.




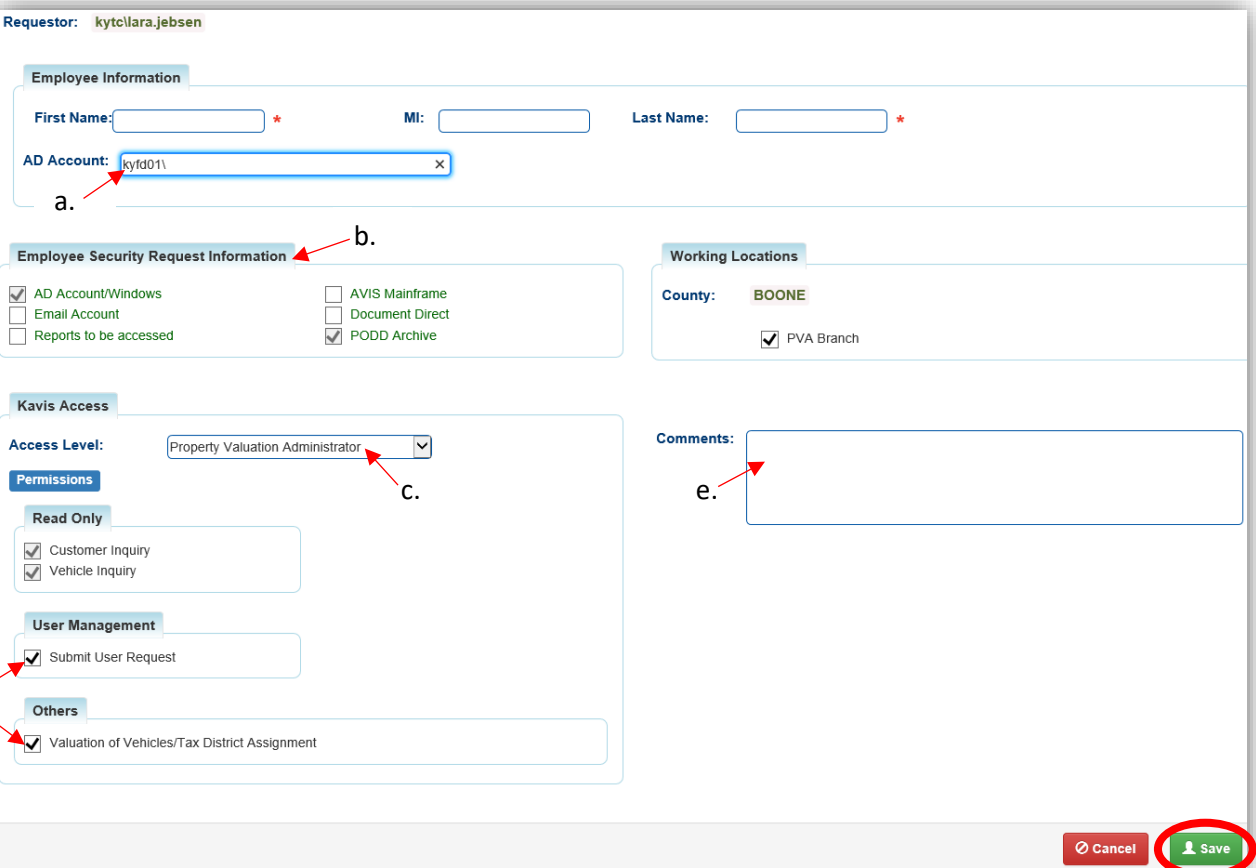
2. From the Home Page, click on 'Employee Management'.



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  .



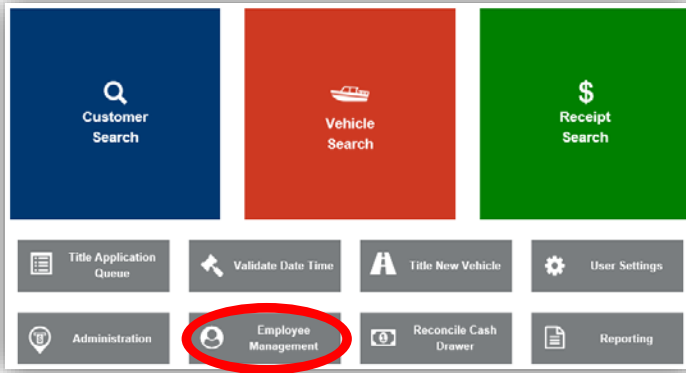
The screenshot shows a web form for creating a user. At the top, it says 'Requestor: kytcllara.jebesen'. The form is divided into several sections:


- Employee Information:** Fields for First Name, MI, and Last Name. The AD Account field contains 'kyfd01' and is highlighted with a red arrow labeled 'a'.
- Employee Security Request Information:** A section with checkboxes for various access types. 'AD Account/Windows' and 'PODD Archive' are checked. A red arrow labeled 'b' points to this section.
- Working Locations:** A section with a 'County' dropdown set to 'BOONE' and a checked 'PVA Branch' checkbox.
- Kavis Access:** A section with an 'Access Level' dropdown set to 'Property Valuation Administrator', highlighted with a red arrow labeled 'c'.
- Permissions:** A section with sub-sections:
 - Read Only:** 'Customer Inquiry' and 'Vehicle Inquiry' are checked.
 - User Management:** 'Submit User Request' is checked.
 - Others:** 'Valuation of Vehicles/Tax District Assignment' is checked. A red arrow labeled 'd' points to this section.
- Comments:** An empty text area with a red arrow labeled 'e' pointing to it.

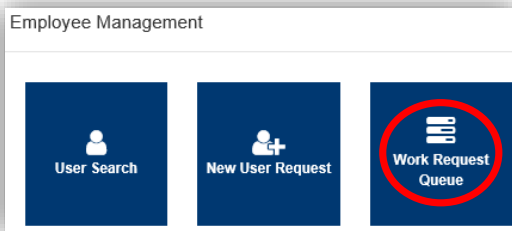
At the bottom right, there are two buttons: 'Cancel' and 'Save'. The 'Save' button is circled in red.


Check the Status of a New User Request


1. Click on  Employee Management from the Home Screen.




2. Then  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.

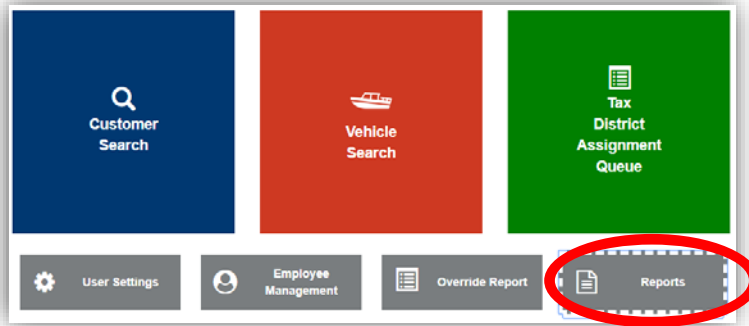
Request Number	Last Name	First Name	Requestor	Request Type	County	Status	Action
REQ181120426	Dwyer	Andy	kytclara.jebesen	New User	MVL	Submitted	

3. a. b.

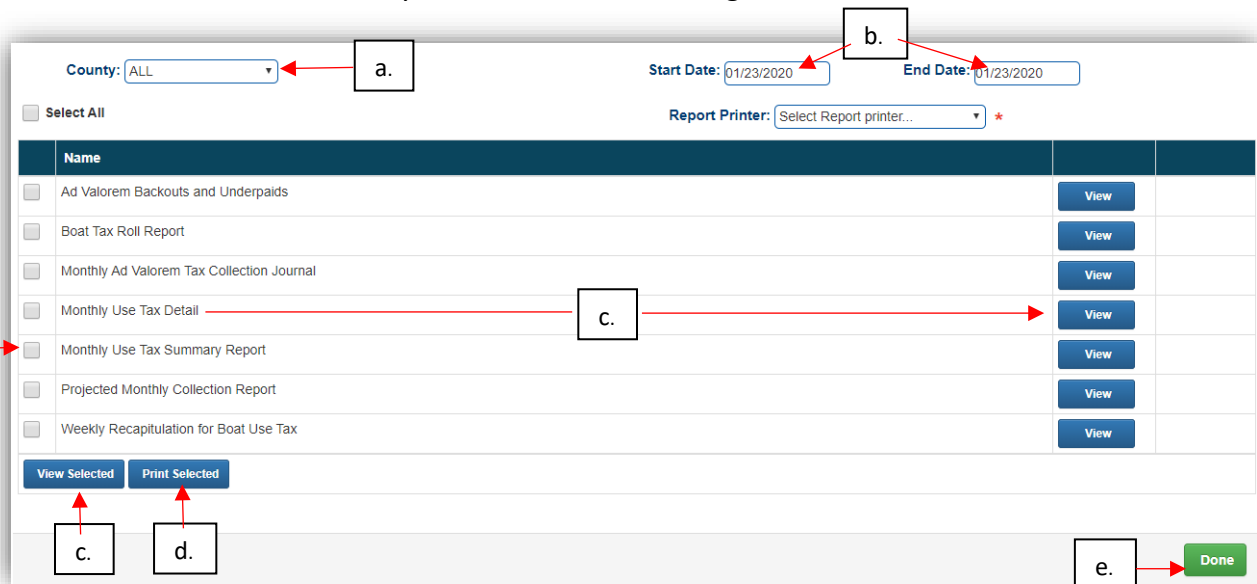


DOR Reports

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 Underpays

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

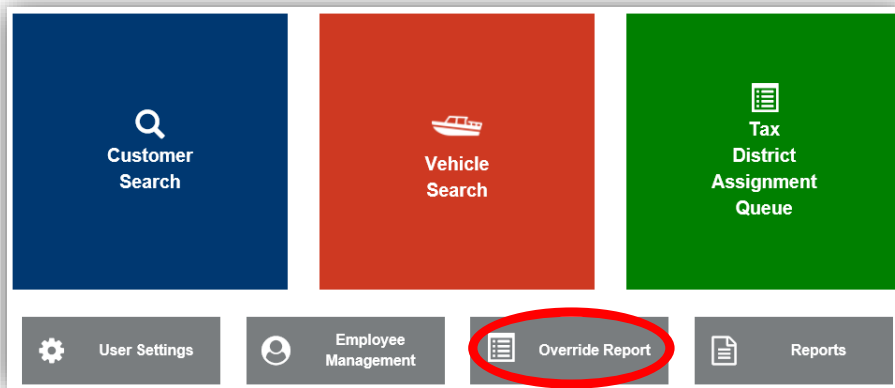
A summary of how much use tax was collected per day in the selected week.


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 **Q Search**
 - 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**.

County: FRANKLIN * Start Date: End Date: **Q Search** Filter: 88

Date	User Name	Year Make Model	Primary Owner	County	Tax Status	Tax Year	Assessed Value	Override Value	Tax District
06/06/2019 10:32:21 AM EST	KYTC\Reagan.Barbee	1968 MONARK M16	COK DEPT OF FISH AND WILDLIFE	FRANKLIN FRANKLIN	Taxable Taxable	2019	\$0.00	\$0.00 \$100.00	88 02
06/06/2019 10:28:49 AM EST	KYTC\Reagan.Barbee	1984 POLARKRAFT P14	COK DEPT OF FISH AND WILDLIFE	FRANKLIN FRANKLIN	Taxable Taxable	2019	\$0.00	\$0.00 \$1,000.00	88 03
06/06/2019 10:25:09 AM EST	kytc\Reagan.Barbee	19 88 GLASTRON G14	COK DEPT OF FISH AND WILDLIFE	FRANKLIN FRANKLIN	Exempted- No Tax Due Copied to New Title	2016	\$0.00	\$0.00 \$0.00	99 99
06/06/2019 10:25:09 AM EST	kytc\Reagan.Barbee	19 88 GLASTRON G14	COK DEPT OF FISH AND WILDLIFE	FRANKLIN FRANKLIN	Exempted- No Tax Due Copied to New Title	2017	\$0.00	\$0.00 \$0.00	99 99