

PVA Practice Scenarios

Follow the scenarios using the data provided to practice KAVIS Boat functionality. Anything done in the practice environment (UAT) does not impact Production (real data).

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

1. Working the Tax District Assignment Queue

The Tax District Queue shows ALL vehicles in user's counties that need an Override Value, assigned a Tax District, and/or has a missing tax segment. The Tax District Assignment Queue is where PVA's will do the majority of their work.

1. From the KAVIS Home Page click the green **Tax District Assignment Queue** button.
2. Begin working assignments by selecting the top title number in the title number column. *Note: Any text in KAVIS that is blue underlined is a hyperlink and will navigate user to another page (e.g. Title Numbers in the Tax District Assignment Queue).
 - a. At the top of the Queue, a user can filter based upon desired action.
 - b. If another user has a Title open, a lock will appear beside the title number.
 - c. Note: A new enhancement, the queue now shows multiple pages in queue if more than 100 vehicles need action taken.
3. KAVIS navigates to the Vehicle Summary Page.
4. In the Ad Valorem Section, KAVIS will denote what action the KAVIS customer needs resolution.
5. If this is a new title or the title is new to Kentucky you will need to assess the value by entering a value into the **Vehicle Override Value** field. This value must be greater than \$100.
6. Assign the Tax District by clicking on the drop down beside **Tax District**. Select a tax district from that list.
7. If a tax Ad Valorem Segment needs to be added, a blue warning message will appear at the top the page telling the user what year needs to be added along with the "Add New Ad Valorem Segment" button in the Ad Valorem Section of the Vehicle Summary Page.
8. Enter in Ad Valorem year if needed and click on **Save** to keep your changes and to finish assigning this tax district.
9. Begin working on the next assignment by clicking on **Next in Queue** at the top of the KAVIS application.



10. In the Owner's Tab, click the blue **Customer ID** to open a pop-over with the customer's information.
 - a. If the Customer has other vehicles, the blue View button in the vehicle's tile will take you to that Vehicle's Summary Page.

2. Adding a new Ad Valorem Segment


This is how to add a new Ad Valorem Segment for a specific year of the selected title.

1. From the Home Page, start by clicking the green **Tax District Assignment Queue** tile.
2. In the Search field, enter '**Smith**' and hit Enter on your keyboard.
 - a. If there isn't anyone in the list, erase 'Smith' and hit Enter.
3. Click on any blue **Title Number**.
 - a. This will take you to that Vehicle's Summary Page.
4. Scroll down to the Ad Valorem Section and click the blue **Add New Ad Valorem Segment** button.
 - a. If this button is not on this page, go to the next scenario, 'Editing an Ad Valorem Segment'.
5. In the dropdown to the left, the year has defaulted to the earliest that is missing for this title. **Change the year** if there are more options.
6. Change the **Tax Status** to Taxable and the **Tax District** to anything other than 99 or 88.
7. Create an **Override Value** for the Vehicle and Motor.
 - a. Notice the Total Taxable Value has added these 2 values for you.
8. Click **Recalculate**, and the amounts due has updated.
9. Change the **Override Value** for the Vehicle and click **Recalculate**.
10. Click the green '**Save**' button, and **Continue** from the warning pop-over.
11. Notice the green Success Message that appears at the top of the page.
 - a. Stay on this page and continue with the next scenario 'Editing an Ad Valorem Segment'.



3. Editing an Ad Valorem Segment

This scenario will show a PVA how to change an Ad Valorem Segment for a specific year of a selected title.

1. On the Vehicle summary Page, scroll down to the **Ad Valorem Section**.
2. From the dropdown menu, if available, choose another year.
 - a. Change the **Tax Status** to Taxable, if it isn't already.
3. Change the **Tax District** to anything but 99 or 88.
4. Create or change the **Override Value** for the Vehicle and Motor.
 - a. Notice the Total Taxable Value has added these 2 values for you.
5. Click **Recalculate**, and the amounts due has updated.
6. Click **Save** and you are taken to the top of the page which now has a green success message.
 - a. Click the  icon in the top left corner to go to the Home Screen.
 - i. This is a quick way to move between vehicles if you have a Customer waiting for you to clear multiple vehicles of 'PVA Issues'.
7. Click the Blue **Select** button from this pop-over to go to that Customer's Account Page.

4. Customer Search

KAVIS is a Customer Centric Application, which means KAVIS provides an at-a-glance view of a customer's account. The Customer Account Page shows vehicles owned, previously owned, disabled placard history, customer information, etc. The Customer Account Page also alerts the user to any action that needs to be taken on a customer or for a vehicle that is owned or previously owned. The PVA's can use the Customer Account Page to pull information on the customer or a vehicle the customer owns.

1. From KAVIS Home Page, click the blue Customer Search button.
2. Driver's License Number is selected by default. Change this by clicking on the **Search By** drop down.
 - a. User can search by the following Customer Attributes:
 - i. Driver's Licenses Number
 - ii. Social Security Number
 - iii. Individual's Name
 - iv. Organization's Name
 - v. Customer Number
 - vi. Passport Number
 - vii. Green Card Number
 - viii. Visa Number
 - ix. ITIN
 - x. Disabled Placard Number
 - xi. Dealer Information



3. Enter the information that you have in the fields that show for the **Search By** option chosen. Click **Search**.
4. KAVIS will pull back search results. Selected desired customer.
5. Click **Select** to go to the Customer Account page for that customer.
6. KAVIS will navigate to the Customer Account Page. The Customer Account Page is where you will be able to view the customer information, vehicle information, Disabled Placard history, and vehicle history.

5. Exploring the Customer Account Page

Every Customer in KAVIS has their own Customer Account Page with their personal information, and links to all current and previously owned boats.

1. From a Customer's Account Page, click the blue **View** button next to the Customer's name to open the Personal Information tab.
2. Below this is the Vehicle Section. Click '**Switch to List View**' to the right.
 - a. The list view will automatically occur if there are 12 or more vehicles.
3. From here, select the **checkbox** next to a vehicle.
 - a. This is how you enable the 'View' button if you want to go to the specific Vehicle's Summary Page.
4. At the bottom, click the **arrow** next to 'Previously Owned Vehicles' to expand this section.
 - a. If there is a vehicle here, click the blue **View** button to go to that Vehicle's Summary Page.

6. Vehicle Search

When searching for a vehicle, KAVIS will navigate the user to the Vehicle Summary Page. This Page will show only the information for that vehicle, such as Owner Information, Previous Titles, Title and Registration Status, Purchase Information, Ad Valorem Information, Vehicle Attributes, and Vehicle History.

1. From KAVIS Home Page, click the red Vehicle Search button.
2. Click on the **Search By** drop down choosing either KY Number, Title Number, or HIN to search by.
3. Enter the KY Number, Title Number or HIN into the field that appears. Click **Search** to look for that boat.
 - a. Click on **Vehicle** to go to the Vehicle Summary Page.
 - b. Click on **Customer** to go to the Customer Account Page.
4. From the Vehicle Summary Page a user can edit the Ad Valorem section to update Tax District, Override Vehicle Value, Override Motor Value, and Add Tax Segment.



7. Exploring the Vehicle Summary Page

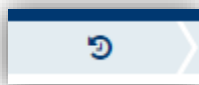
Each boat in KAVIS has its own Vehicle Summary Page where you can add and edit tax segments. It will also have specific information on the title as well as links to PODD documents, previous titles, and the Owner(s) Customer Account Page(s).

1. From the Home Page, click the red Vehicle Search tile.
2. Search by **Title Number** and enter one from the data list provided.
3. Click **Search**. If there are no search results for that title number, search for another from the data provided.
 - b. Click the blue **Select** button from the search results to go to the Vehicle Summary Page.
4. Next to the Owner(s) tab, click on **Chain of Ownership**.
 - c. This will show you all previous owners of this boat.
 - d. If there are multiple titles, click on one of the blue **Title Numbers**.
 - i. This will take you to a previous title's Vehicle Summary Page.
5. The Title and Registration Information sections give you information specific to this boat.
 - e. Scroll down and notice the information given in the Vehicle Information and Attributes Sections.
6. In the Vehicle History section, if there are previous **years** in the drop-down menu, choose one.
 - f. Click on the blue **Control Number** (Cntrl Number) if there is one. Once in production, this will include links to PODD documents.
7. If you selected a previous title in step 4, click the green **Next** button at the top of the page until you are back to the most recent title.

8. History

The History Drop Down will save the last five Customers searched for using the Customer Search tile and the last five vehicles searched for using the Vehicle Search tile. This feature helps with navigating throughout the application.

1. In the top left of the KAVIS application click on the History Drop Down Icon.



2. This will bring up the recent search results.
 - a. Under Recent Customers click on a name to go to their Customer Account.
 - b. Under Recent Vehicles click on a vehicle to go to that Vehicle Summary page for that vehicle.



9. Finding and Printing Reports

This section will show a PVA how to find the Boat Tax Roll Report and Projected Monthly Collection Report.

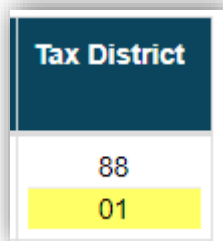
1. From the KAVIS Home Page click on the grey **Reports** tile.
2. There are two reports for boats:
 - a. Boat Tax Roll Report – To preview this report without printing click on **View**.
 - b. Projected Monthly Collection Report – To preview this report without printing click on **View**.
3. To print these reports select a printer from the drop down beside **Report Printer**.
4. Click on the check boxes beside the reports and click **Print Selected**.

10. Override Report

This scenario will walk through what the Override Report is, where to find it and how to use it. The Override Report shows all of the titles that have had a change in Override Value, Tax District or both.

1. From the KAVIS Home Page click on the grey **Override Report** tile.
2. Select a **Start Date** and an **End Date** for a range of days to include. Click on **Search** to see titles that had changes made on those days.
3. Each result of the Override Report will include **Date, User Name, Title Number; Year; Make; Model, Primary Owner, County, Tax Status, Tax Year, Assessed Value, Override Value and Tax District**.
4. There will be some yellow highlighting on each result on the **Override Report**. This is what indicates the field that changed and the heightened field is what the value of that field changed to.

For example: This **Tax District** was changed from 88 to 01.



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

Don't hesitate to contact us with any questions or recommendations you have:
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KAVIS Support Team: kavis@ky.gov or (502) 782-1018