



DOR/PVA KAVIS BOAT MANUAL

Updated September 27, 2019



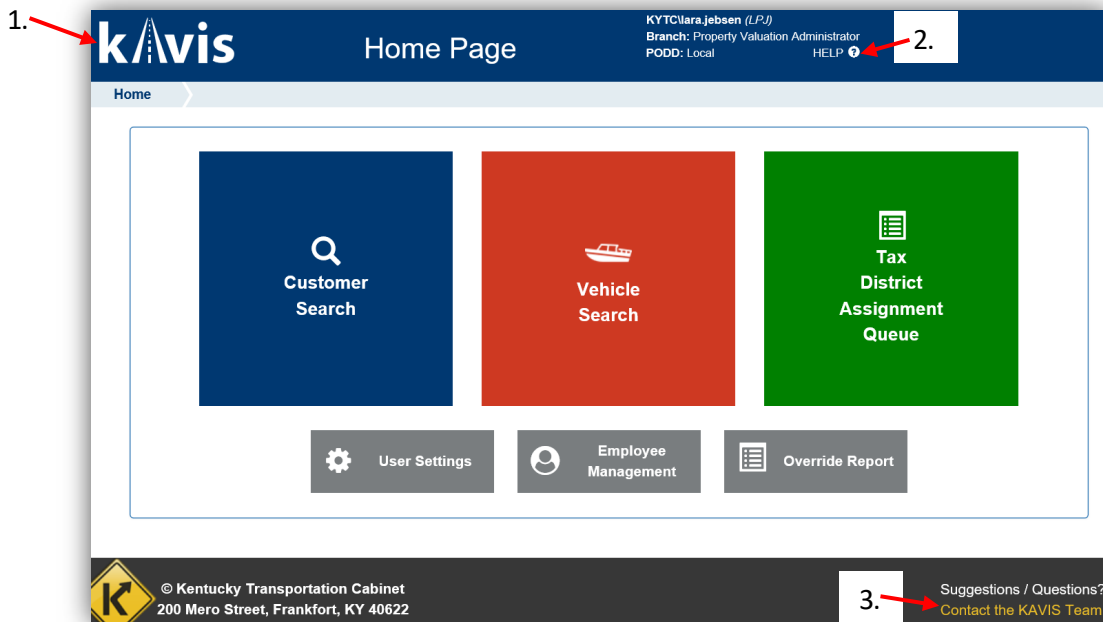
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Home Page Navigation

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.



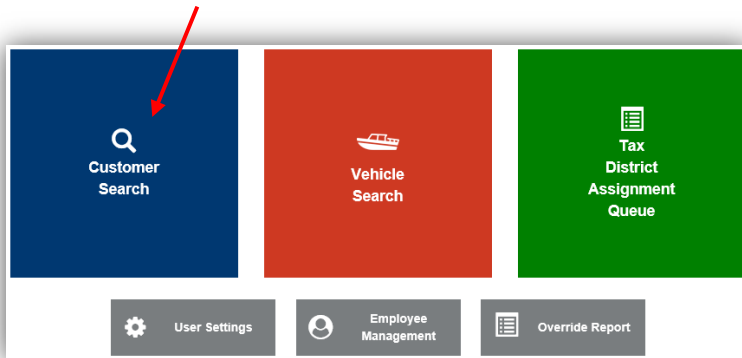
4. If you have a KAVIS account, you are referred to as a User. County Clerks, DOR and MVL employees with KAVIS accounts are also called Users.
 - a. The '[User Management](#)' section of this manual is referring to your personal KAVIS account and the accounts of your coworkers.

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 'Search By:' dropdown menu. The dropdown menu is open, showing a list of 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 dropdown menu, and another red arrow points to the 'Search' button. A red asterisk is next to the input field.

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 search results table with the following 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. Three rows are highlighted in green. A red arrow points to the 'Display Search Criteria' link, and another red arrow points to the 'Select' button. A red asterisk is next to the input field.

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

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 for Tara Wright. It includes fields for Last Name, First Name, Middle Name, Suffix, Birth Date, County of Residence, Preferred Name, Gender, and Citizenship. It also shows a Mobile phone number and an SSN. At the bottom 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. The tile contains the following information: 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

Active - Title Issued
Reg: Expired

View

1967 POLAR CRAFT UNKN **M**

Title#: 930330080060
Original

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**

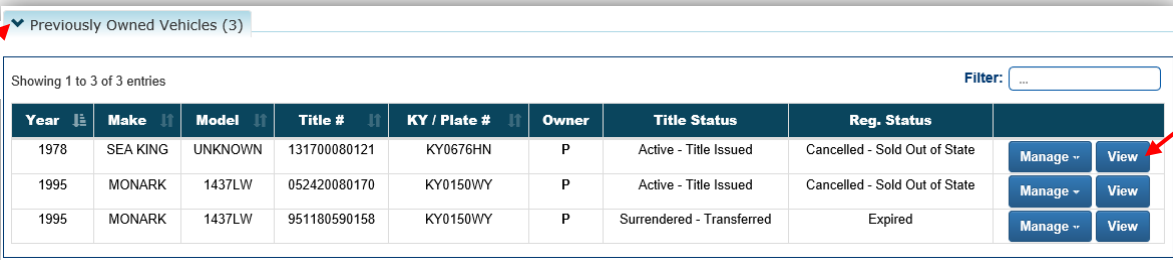
Showing 1 to 2 of 2 entries **Filter:** ...

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. 

Previously Owned Vehicles (3)

Showing 1 to 3 of 3 entries Filter:

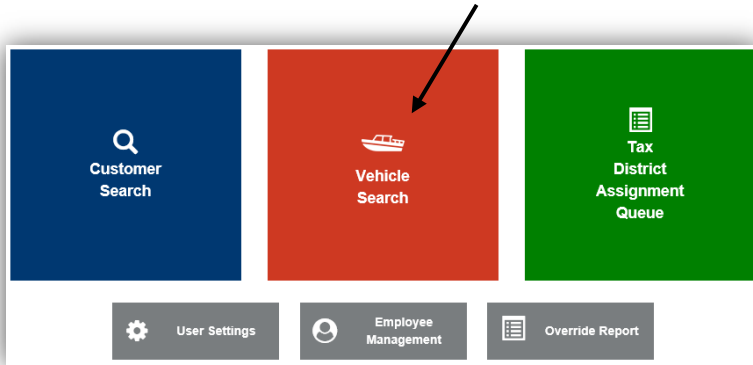
Year	Make	Model	Title #	KY / Plate #	Owner	Title Status	Reg. Status		
1978	SEA KING	UNKNOWN	131700080121	KY0676HN	P	Active - Title Issued	Cancelled - Sold Out of State	Manage	View
1995	MONARK	1437LW	052420080170	KY0150WY	P	Active - Title Issued	Cancelled - Sold Out of State	Manage	View
1995	MONARK	1437LW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

a.

Vehicle Summary Page

Searching for a Title

1. From the Home Page, click the Vehicle Search tile.



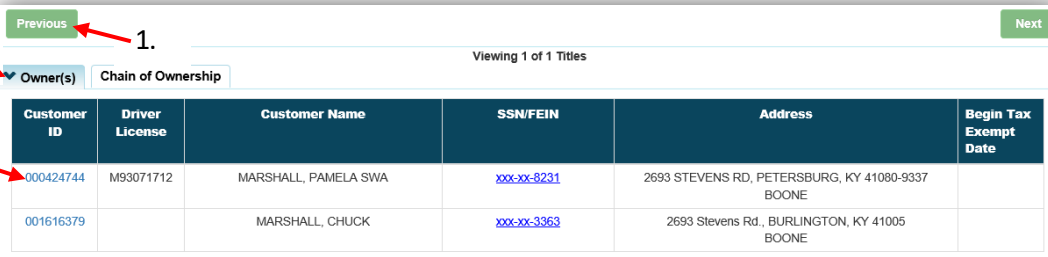
2. Choose from the dropdown menu how you would like to search for the vehicle, enter the requested info, and click **Search**:

The screenshot shows 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' field contains '012290080164'. The 'Search' button is circled in red. A red arrow points from the '2.' in the previous step to the 'Search By:' dropdown.

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.



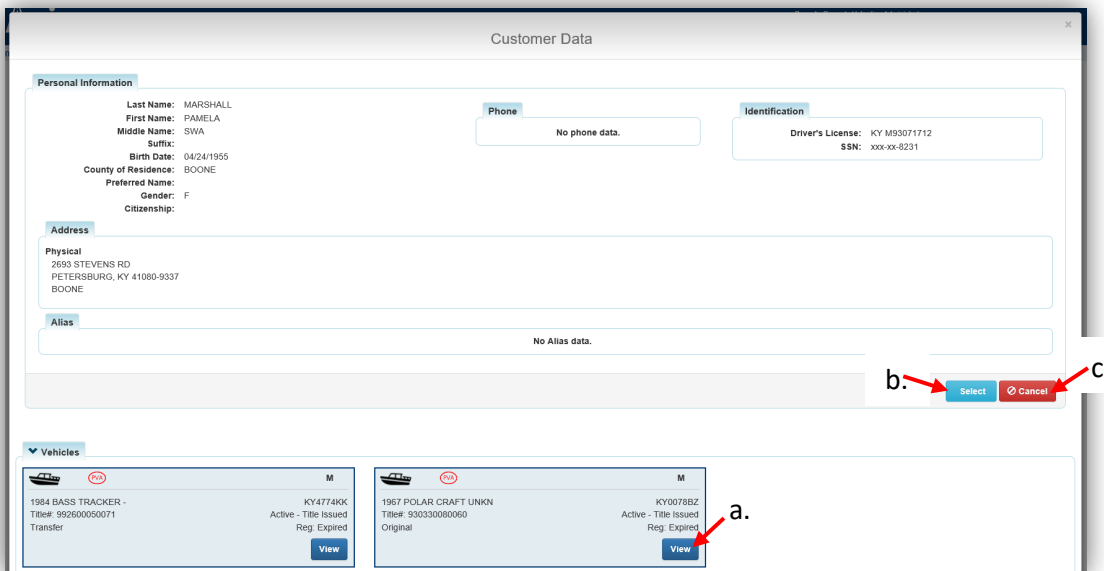
1. Previous

2. Owner(s)

3. 000424744

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 - KY 4774KK
 Title# 592600850071
 Transfer
 Active - Title Issued
 Reg. Expired
 View

1967 POLAR CRAFT UNKN - KY 0078BZ
 Title# 530330080050
 Original
 Active - Title Issued
 Reg. Expired
 View

b. Select

c. Cancel

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:



4. Previous

Next

Owner(s) Chain of Ownership

Viewing 6 of 6 Titles

Seq.	Title Number	Primary Owner	Address	Title Status	Issue Date	Last Action Date
6	190460085002	LEMMOND, SALLY SIMS	1106 Merrell Rd., BURLINGTON, KY 41005	Application		02/16/2019
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:

Vehicle History

2019
2018
2017
2016
2015
2014

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

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.

1. The year dropdown will allow you to view the years this title has ad valorem assigned
 - a. 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, you must contact the PVA office of the current County or Dockage and have them change that specific year's segment to your county.

▼ Ad Valorem

2019
2018
2017
2016
2015
2014

Transaction ID: 033421100

County Paid: BOONE

Tax Status: Taxable

Vehicle Assessed Value: \$1,569.00

Motor Assessed Value: \$0.00

County of Dockage: BOONE

Tax District: 08

Vehicle Override Value:

Motor Override Value:

Total Taxable Value: \$1,569.00

Ad Valorem Due: \$20.65

Penalty Due: \$2.07

Interest Due: \$4.53

Clerk Fee: \$2.00

Total Amount Paid: \$29.25

Recalculate Cancel Save

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.

▼ Ad Valorem

2018

Transaction ID: 033421100

County Paid: BOONE

Tax Status: Taxable

Vehicle Assessed Value: \$1,569.00

Motor Assessed Value: \$0.00

County of Dockage: BOONE

Tax District: 08

Vehicle Override Value:

Motor Override Value:

Total Taxable Value: \$1,569.00

Ad Valorem Due: \$20.65

Penalty Due: \$2.07

Interest Due: \$4.53

Clerk Fee: \$2.00

Total Amount Paid: \$29.25

Recalculate Cancel Save

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**.

▼ Ad Valorem

2018

Transaction ID: 033421100

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

Tax Status: Non-Taxable Current Year

Vehicle Assessed Value: \$1,569.00

Motor Assessed Value: \$0.00

County of Dockage: BOONE

Tax District: 99

Vehicle Override Value:

Motor Override Value: 0

Total Taxable Value: \$1,569.00

Ad Valorem Due: \$0.00

Penalty Due: \$0.00

Interest Due: \$0.00

Clerk Fee: \$0.00

Total Amount Paid: \$0.00

Cancel 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).

The screenshot shows the 'Ad Valorem' form for the year 2018. A red message at the top states: '* 2018 tax segment has been adjusted and is pending Clerk action'. The form fields include: Transaction ID: 033421103, County Paid: BOONE, County of Dockage: BOONE, Tax Status: Non-Taxable Current Year, Tax District: 99, Vehicle Assessed Value: \$1,569.00, Motor Assessed Value: \$0.00, and Total Taxable Value: \$1,569.00. On the right, a summary shows Ad Valorem Due: \$0.00, Penalty Due: \$0.00, Interest Due: \$0.00, Clerk Fee: \$0.00, and Total Amount Paid: \$0.00. At the bottom right, there are three buttons: 'Undo Pending Changes' (orange), 'Cancel' (red), and 'Save' (green). A red arrow labeled '4.' points to the message, and another red arrow labeled 'a.' points to the 'Undo Pending Changes' button.

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. **Cancel** will undo all changes. In KAVIS, nothing is permanent until you click **Save**.

The screenshot shows the 'Ad Valorem' form with several changes. The Tax Status is now 'Taxable', and the Tax District is '02'. The Vehicle Override Value is '1500' and the Motor Override Value is '100'. The Total Taxable Value is now \$1,600.00. On the right, the summary shows Ad Valorem Due: \$20.57, Penalty Due: \$2.07, Interest Due: \$4.52, Clerk Fee: \$2.00, and Total Amount Paid: \$29.16. At the bottom right, there are three buttons: 'Recalculate' (blue), 'Cancel' (red), and 'Save' (green). Red arrows labeled 'a.', 'b.', 'c.', and 'd.' point to the Tax District dropdown, the Override input fields, the Recalculate button, and the Cancel button respectively.

6. The following Success message will show at the top of the Vehicle Summary Screen:

Success
 ✓ Ad Valorem changes saved

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, there 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' above 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 summary fields: 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. If you change the County of Dockage, the Tax District will automatically change to 88 and after being saved, and you will no longer be able to edit this title's ad valorem for the year chosen.
 - o If this is done by mistake, you must contact that County's PVA and have them change that year's County of Dockage back to your county:

The screenshot shows the 'Ad Valorem' section with the year dropdown menu open, displaying options from 2009 to 2020. A red arrow labeled 'a.' points to the 2009 option. The County of Dockage dropdown menu is also open, showing 'BARREN' and '88'. A red arrow labeled 'b.' points to the '88' option. The Tax District is set to '88'. The Vehicle Assessed Value is \$0.00 and the Motor Assessed Value is \$0.00. The Total Taxable Value is \$0.00. The summary fields on the right show Ad Valorem Due (\$0.00), Penalty Due (\$0.00), Interest Due (\$0.00), Clerk Fee (\$0.00), and Total Amount Due (\$0.00). The 'Recalculate', 'Cancel', and 'Save' buttons are 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:

The screenshot shows the 'Ad Valorem' section with the year dropdown menu set to '2009'. The Tax Status dropdown menu is open, showing options: 'Exempted- No Tax Due', 'Non-Taxable Junked', 'Non-Taxable Transferred out of state', 'Non-Taxable Current Year', and 'Taxable'. A red arrow labeled 'a.' points to the 'Non-Taxable Current Year' option. The County of Dockage is set to 'BOONE' and the Tax District is set to '99'. The Vehicle Assessed Value is \$0.00 and the Motor Assessed Value is \$0.00. The Total Taxable Value is \$0.00. The summary fields on the right show Ad Valorem Due (\$0.00), Penalty Due (\$0.00), Interest Due (\$0.00), Clerk Fee (\$0.00), and Total Amount Due (\$0.00). The 'Cancel' and 'Save' buttons are at the bottom right.

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: _____ County of Dockage: BOONE

Tax Status: Taxable Tax District: 11

Vehicle Assessed Value: \$0.00 Vehicle Override Value: 1500

Motor Assessed Value: \$0.00 Motor Override Value: 100

Total Taxable Value: \$1,600.00

Ad Valorem Due: \$21.76

Penalty Due: \$2.18

Interest Due: \$36.26

Clerk Fee: \$2.00

Total Amount Due: \$62.20

Recalculate Cancel Save

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
001087320		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

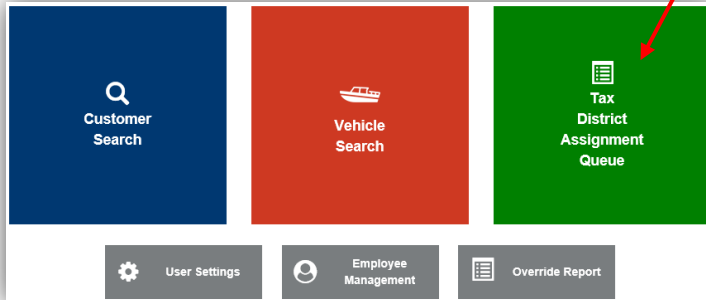
a.

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):

County: BOONE

Search:

2.

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

Title Number	Primary Owner	Year	Make	Model
▶ 191510085001	GRABOW, MAURICE	2015	BENNINGTON MARINE	24SCWX
▶ 191440085001	SMITH, KATHY H	1065	Viking	Ship
▶ 191340085001	BANK FIFTH THIRD	1976	STARCRAFT	16X5
▶ 191230685001	HICKS, PAUL K	1989	BARETTA	OPEN BOWSS
▶ 191190375007	MULDOON, PATRICK	2008	YAMAHA	VX1100
▶ 191120375002	BIEDENHARN, ROBERT	1990	SEARAY	2200
▶ 191090375002	MICHELS, PAUL M	2006	JON BOAT	NA
▶ 191020085001	DUMMITT, ABBY F	1985	Honda	Boat
▶ 191010085001	WEST, RALPH	1065	Viking	Ship
▶ 183610080024	HAGSTROM, MONTY	2016	MASTERCRAFT	X-23
▶ 183610080183	MCGLOSSON, BLAKE	2000	BOMBARDIER	5513
▶ 183540080154	ALOYO, NATHANIEL	1989	BAJA	UNKWN
▶ 183520080031	KIRBY, JULIE	1993	BAYLINER	TROPHY
▶ 183480080177	BAETEN, JONATHAN	1994	DUCK BOAT	TDB14
▶ 183450080067	BAILEY, CHARLES	2005	LARSON BOAT	206BR SENZ

3.

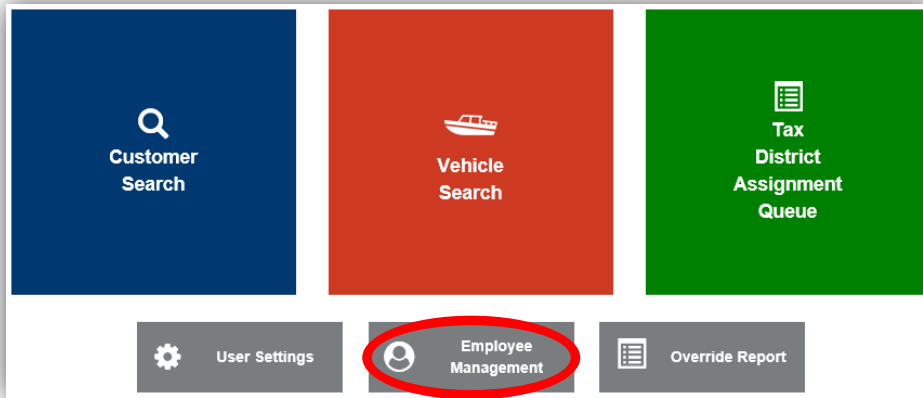
3. Clicking on the Title Number will take you to the Vehicle Summary Screen where you can edit the Ad Valorem section as needed.
 - a. Reference the ['Editing an Ad Valorem Segment'](#) section of this manual for more details on how to do this.
4. When you successfully save the assignment of a value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

User Management

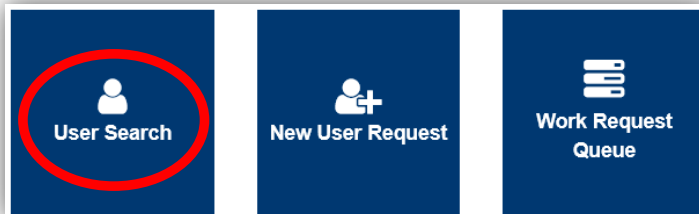
Searching for a User's Account



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

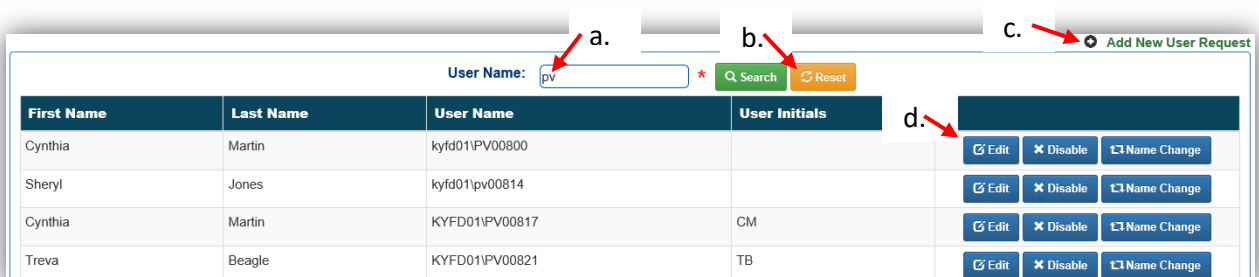
1. From the Home Page, click on 'Employee Management':



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:

First Name	Last Name	User Name	User Initials	
Lara	Jebson	kytcllara.jebson	LPJ	1. Edit 2. Disable 3. Name Change

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:

Requestor: kytcllara.jebson

Employee Information

First Name: Lara Last Name: Jebson User Initial: LPJ

AD Account: kytcllara.jebson

Mainframe ID-CC/DT#: CC10101 Confirm Mainframe ID-CC/DT#: CC10101

Employee Security Request Information

AD Account/Windows AVIS Mainframe
 Email Account Document Direct
 Reports to be accessed PODD Archive

Working Locations

County: BOONE
 PVA Branch

Kavis Access

Access Level: Property Valuation Administrator

Permissions

Read Only

Customer Inquiry
 Vehicle Inquiry

User Management

Submit User Request

Others

Valuation of Vehicles/Tax District Assignment

Comments:

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

2. If you chose [Disable](#) from the search results, you will be given the following prompt for comments:

You are about to disable access for kytcllara.jebson. Select "Cancel" to return to Search or select "Continue" to disable system access.

Comments:

[Cancel](#) [Continue](#)

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 says "Requestor: kytcllara.jebesen". Below that is a section titled "Employee Information" with fields for "First Name" (Lara) and "Last Name" (Jebesen), both marked with a red asterisk. It also shows "AD Account: kytcllara.jebesen" and "Mainframe ID-CC/DT#: CC10101".

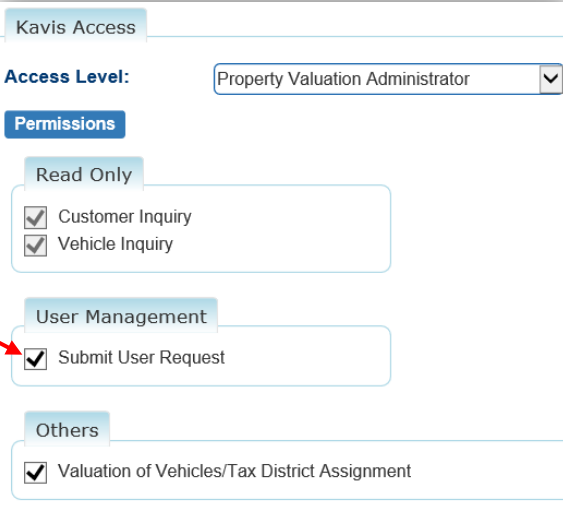
Below the employee information is a "Name Change Reason" dropdown menu with a red asterisk and a red arrow pointing to it, labeled with a "4.". The dropdown menu is open, showing options: "Select One...", "Marriage", "Divorce", "Legal Name Change", and "Correction".

Below the dropdown is a "Comments" text area, also marked with a red asterisk. At the bottom right of the form are two buttons: "Cancel" and "Save", 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.

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

1. 

Kavis Access

Access Level: Property Valuation Administrator

Permissions

Read Only

- Customer Inquiry
- Vehicle Inquiry

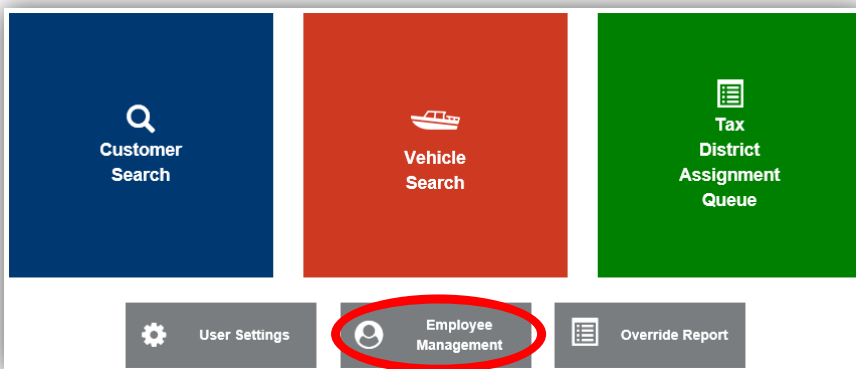
User Management

- Submit User Request

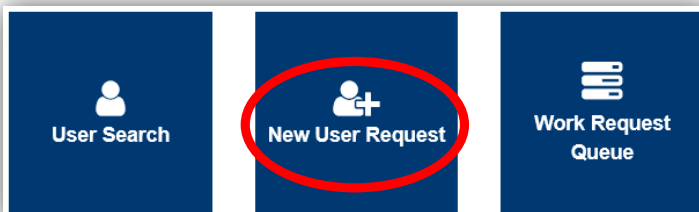
Others


- Valuation of Vehicles/Tax District Assignment

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** :

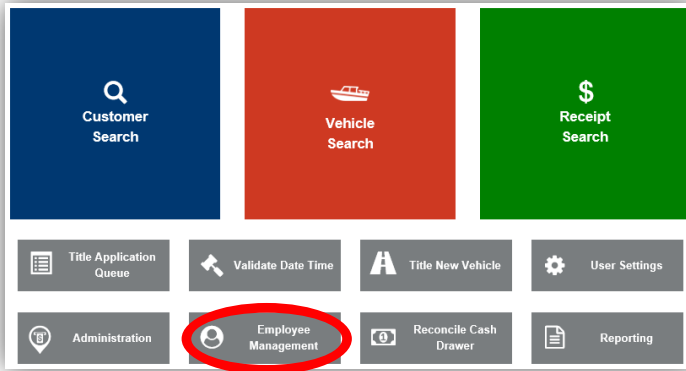
The screenshot shows a web form for creating a user. At the top, it says 'Requestor: kytcllara.jebesen'. The form is divided into several sections:


- Employee Information:** Fields for First Name, MI, Last Name, and AD Account. A red arrow labeled 'a.' points to the AD Account field, which contains 'kyfd01'.
- Employee Security Request Information:** A section with checkboxes for various access types. A red arrow labeled 'b.' points to this section. The checked options are 'AD Account/Windows', 'PODD Archive', and 'PVA Branch' (under Working Locations).
- Working Locations:** A section with a 'County' dropdown set to 'BOONE' and a checked 'PVA Branch' option.
- Kavis Access:** A section with an 'Access Level' dropdown set to 'Property Valuation Administrator'. A red arrow labeled 'c.' points to this dropdown.
- 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:** A large text area for adding comments. A red arrow labeled 'e.' points to this area.

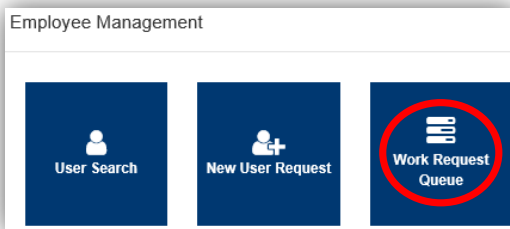
At the bottom right, there are two buttons: 'Cancel' and 'Save'. The 'Save' button is circled in red.


Check the Status of a New User Request


1. Click on  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:
 - **Submitted** – This status indicates the user’s request has been successfully submitted to MVL for review.
 - **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	

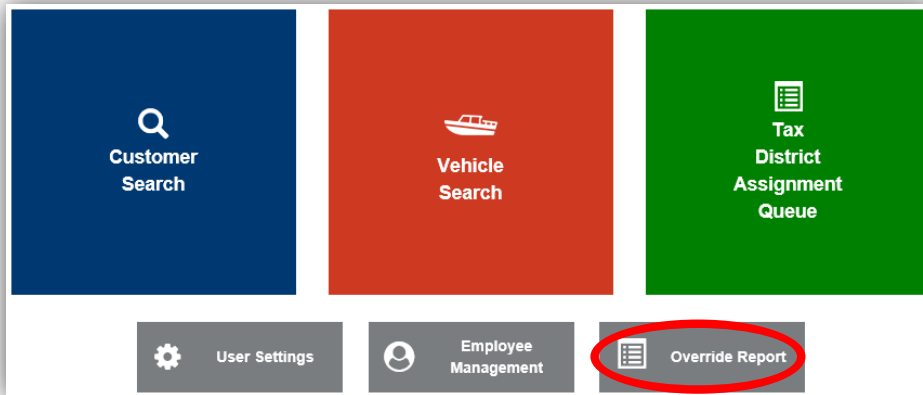
3.  a.  b. 




Override Report


This will show you all changes that have been made in your county in the **previous 30 days**, and details about those changes. 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. You can select a specific 1-month time period to search before clicking **Q Search**
 - a. 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.
 - b. You may also filter the results by keyword
 - c. Clicking on the  icon in the Date column will change their display order
 - d. The changes made by the User listed is highlighted in yellow:

County: BOONE Start Date: End Date: **Q Search**

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

b. Filter

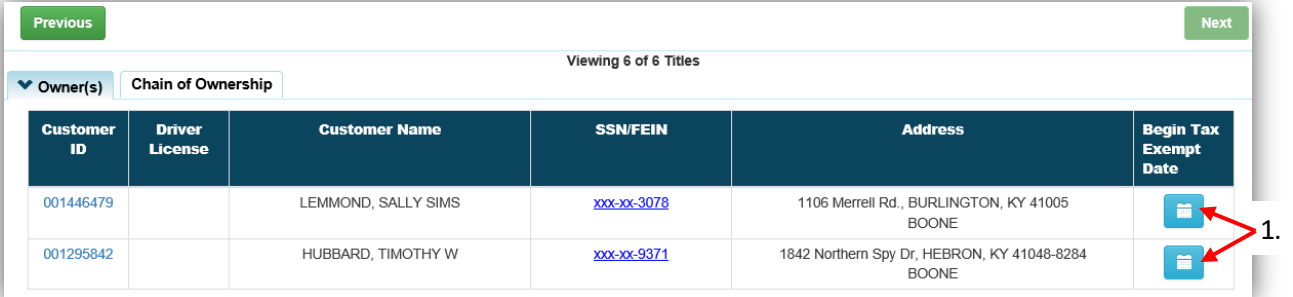
Date	User Name	Year Make Model	Primary Owner	County	Tax Status	Tax Year	Assessed Value	Override Value	Tax District
04/11/2019 04:59:13 PM 45T	KYTC\lara.jebesen	1996 SEA DOO JET BOAT	BRENTLINGER, BRADLEY	BOONE	Taxable	2019	\$1,119.00	\$0.00	88
				BOONE	Taxable			\$5,000.00	12
04/11/2019 04:22:37 PM 45T	KYTC\lara.jebesen	2008 SEADOO PWC	WHITE, ROSCOE	BOONE	Taxable	2019	\$2,688.00	\$0.00	88
				BOONE	Non-Taxable Current Year			\$0.00	99
04/11/2019 04:10:40 PM 45T	KYTC\lara.jebesen	1984 DLX JON 0	BRYSON, RICK R	BOONE	Taxable	2019	\$195.00	\$0.00	88
				BOONE	Taxable			\$200.00	13
03/29/2019 04:22:07 PM 53T	BC	1989 SEA RAY 160B	ANDRES, JESSICA J	BOONE	Taxable	2019	\$803.00	\$0.00	88
				BOONE	Taxable			\$0.00	13

Further Actions for Department of Revenue

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:



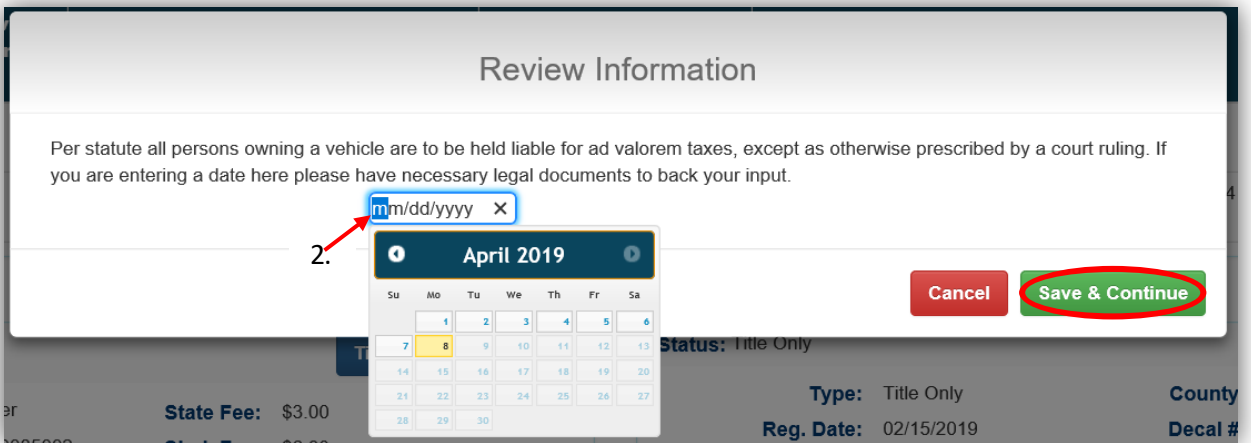
Previous Next

Viewing 6 of 6 Titles

Owner(s) Chain of Ownership


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

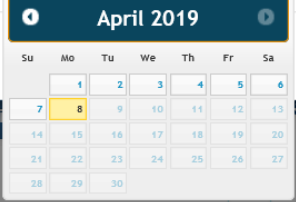
2. A pop-over will allow you to enter the date for the start of the Tax Exemption and click **Save & Continue**
 - a. You must choose a past or the current date, you cannot choose a future date:



Review Information

Per statute all persons owning a vehicle are to be held liable for ad valorem taxes, except as otherwise prescribed by a court ruling. If you are entering a date here please have necessary legal documents to back your input.

m/d/yyyy 

2. 

Cancel **Save & Continue**

Status: Title Only

Type: Title Only

County

State Fee: \$3.00

Reg. Date: 02/15/2019


Decal #

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

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:

Viewing 6 of 6 Titles

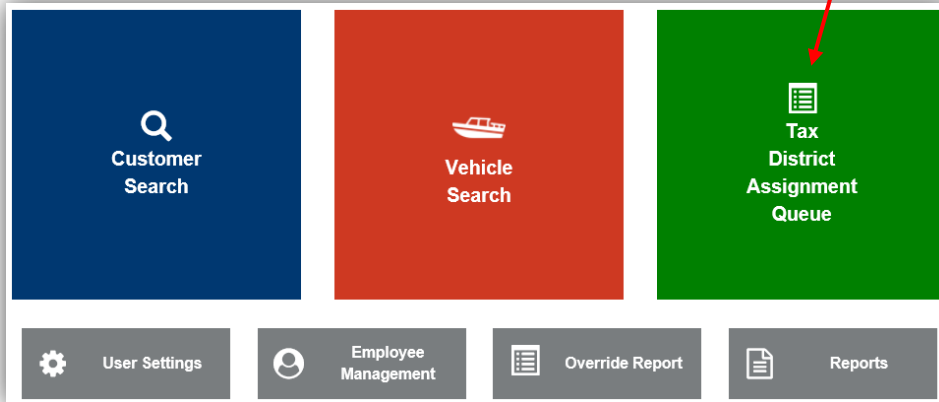
▼ Owner(s) Chain of Ownership

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. The County dropdown menu will have 'All' chosen, you can change it to search that specific County
 - a. You can filter by entering a name, make, model, or numbers into the search field and hitting Enter on the keyboard:

The screenshot shows a search interface with a 'County' dropdown menu set to 'BOONE' (labeled 'a.') and a 'Search' field containing 'smith' (labeled 'b.'). Below the search fields is a table of results. The first row of the table is highlighted (labeled '3.').

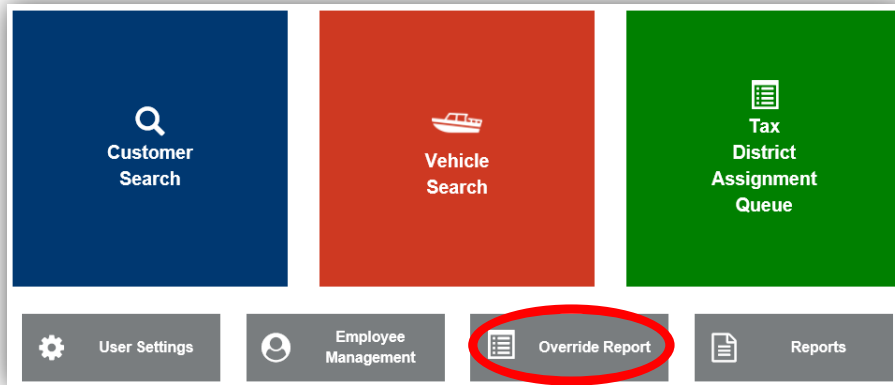
Title Number	Primary Owner	Year	Make	Model
▶ 191440085001	SMITH, KATHY H	1065	Viking	Ship
▶ 181830080128	SMITH, LESLIE	2018	WATERCRAFT	NITROZ19SP
▶ 181620080246	SMITH, WILLIAM	2018	SKEETER	FX21
▶ 102430590072	SMITH, DANIEL G	1973	SWISSCRAFT	BASS
▶ 101410080087	SMITH, DUSTIN L	2004	BLAZER	210
▶ 091180590084	SMITH, JANICE	1992	YAMAHA	WRA650Q
▶ 032110080029	SMITH, DAN	1972	SEARS	000
▶ 011030080088	GOLDSMITH, JEFF	1976	ARROW GLASS	TAPRON

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.


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