# County Transactions - Demonstration

### Introduction

In this chapter, we will take you through a demonstration of transactions done in KCoVRS at the county and/or state prior to any transactions a vendor would complete. As mentioned in the class description, there will be emphasis on the documentation needed for all types of transactions.

### Learning Objectives

After completing this chapter, you will be have learned about:

* Required Documentation
* Creating a New Customer to KCoVRS
* Adding an Account to KCoVRS
* Adding a Fleet to an Account

The title work may be done after the registration work, if being done by a vendor.

### Lab 1-1 Instructor

**Go through lab with students using the steps, when the lab is complete read the following paragraph:**

Title only step 7: If the message VIN is invalid displays, instruct the students to click ignore, we made up the VIN’s for training.

We are now finished with the Title Only transaction, in class we will not create a title only for any of the remaining labs, just keep in mind that you will need to check safersys and create a title only in MOVRS for EVERY newly purchased or newly registered vehicle in KCoVRS.

We are now ready to sign in to the KCoVRS system, follow steps 1 and 2, and then we will skip to lab 5-1 to open the office. Once the office is opened, we will continue with step 4 to open our cash drawers.

## Lab 1-1: Adding a New Customer to KCoVRS

Before your business can be set up in KCoVRS, they must have an active DOT#, an FEIN Assignment letter, Articles of Incorporation from the Secretary of State and 3 proofs of residency that are consistent throughout the rest of their documentation.

A Registrant Only is an individual who owns their vehicle and pays for the registration, but is using another company’s DOT number, IFTA, FEIN, etc. The individual has been granted the authority to use this information and a safety agreement is in place between the two parties.

Documentation:

* FEIN Assignment Letter
* USDOT Number
* Articles of Incorporation
* 3 Proofs of Residency
* Lease Agreement – Registrant Only
* Non-Motor Carrier Safety Declaration – Registrant Only
1. Check the status of the customer’s DOT number at

**FMCSA Website**: <https://safer.fmcsa.dot.gov/CompanySnapshot.aspx>

1. Click the **Customer** menu, and then select **New Customer**.

The **Customer – New Customer** window displays.

1. Type the Tax Identification Number in the **TIN:** field.
**Note:** The TIN must be 9 digits, lead with zeros, if needed.
2. Type the DOT in the **USDOT No:** field if the customer is a carrier.
**Note:** If your customer has a DOT number, the system runs a check through CVIEW, if you check the CVIEW check box*. If your customer’s DOT number is not active the KCoVRS system will not let you proceed in setting up an account or processing any other supplements under that DOT #.*
3. Click the **Proceed** button.

The **Customer Detail** window displays.

1. Verify or type the full legal name in the **Legal Name:** field.
2. Click the **Registrant Type** drop-down list, and then select the applicable type.
3. Click the **Carrier Type** drop-down list, and then select applicable type.
**Note:** If the customer is DOT Exempt, select N-NO DOT REQUIRED. If the customer is a Registrant Only customer, you will select **Registrant** **Only** under the carrier type drop-down.
4. Type the address in the **Street:** field.
5. Click the **Jurisdiction** drop-down list, and then select **Kansas**.
6. Type the ZIP code in the **ZIP Code:** field, and then press the **Tab** key. The **City:** and **County:** fields will auto populate.

**Note:** The customer must have a physical address in Kansas to register.

1. Click the **Mailing Address** tab.

**Note:** The customer can have an out of state mailing address (verify that the mailing address populated correctly with your customer).

Add a mailing address, if applicable.

1. Type the **Primary Contact Name**, **Email ID** and **Primary Phone** in the applicable fields.
2. In the Documents section, click the **Proof of Residency** drop-down list, and then select **Collected**

**Note:** Customers must supply proper documentation for proof of Kansas Residency or to change an existing address. Three proofs of residency are required.

**Important:** If the applicant is an individual, all proof of residency must be in the individual’s name. If the applicant is a business, all proof of residency must be in the business name.

1. Click the checkbox of the documents collected and scan.
(Show scanning slide show, if necessary)
2. Click **Non-Motor Carrier Declaration**. Select **Collected** if the customer is a Registrant only. Registrant Only are the only accounts that will need to supply the Non-Motor Carrier Safety Declaration form. Select **Not Required** if the customer is a carrier.
3. Click **Articles of Incorporation** Select **Collected** if the customer’s account is a corporation; all businesses need to register with the Secretary of State and submit their Articles of Incorporation. Select **Not Required** if it is an individual registering.
4. Click the **Proceed** button.

The **Customer Details Verification** window displays. Verify the information.

1. Click the **Proceed** button.

## Lab 1-2: Adding an Account

Now that a new customer has been created, an account must be associated to the customer record on the Application level.

Documentation:

* FEIN
* US DOT
* Articles of Incorporation
* Power of Attorney
* 3 proofs of residency
* Schedule A – Records Retention
* Schedule B
* Schedule C
* Schedule D
1. Click the **Applications** menu, and then select **IRP & CMV**.

The **Application-IRP Level** window displays.

1. Click the **Process** menu, select **Account** and then **New Intrastate Account** for a CMV customer or select **New IRP Account** for an IRP customer.

The **Customer Search** window displays.

Notice the account number auto-populates in the **Account No.** field.

**Note:** There can be only one account per customer record. The customer record and the customer account use the same account number.

1. Click the **Proceed** button.

The **Customer Details** window displays.

1. Click the **Proceed** button.

The **Customer Details Verification** window displays.

1. Verify the information, and then click the **Proceed** button.

The **Fleet** tab displays.

## Lab 1-3: Adding a Fleet

Now that an account has been added for the customer, a fleet will be created for the customer. A fleet is used to assign vehicles (units) to an account and can contain one or more vehicles.

1. Click the **Service Provider** drop-down list and select the correct service provider name.

The name and address fields auto-populate. If you leave the **Service** **Provider** field blank, you may fill in the required information.

1. Check the **Power of Attorney** checkbox.

Verify the **Fleet Details Contact** information.

1. Verify the **Preferred Office Location**; change to your county location, if applicable.
2. Click the **Fleet Type** drop-down list in the middle of the window, and then select **CMV – Commercial Vehicle.**

**Note:** Contact KDOR to add a fleet.

1. Type the customer’s insurance information in the corresponding fields.
2. Click the **Proof of Insurance** drop-down list and select **Collected**.
3. Click the **Power of Attorney** drop-down list and select **Collected**
4. Change the **IFTA Distance**, if applicable.

**Note:** IFTA information is need for IRP only.

1. Scan all documents collected.
2. Type and save a note in the **Comments** section, if applicable. If you add a note, you must then click the Add/Update Comment button to save it.
3. Click the **Proceed** button.

The **Fleet Details Verification** window displays.

1. Click the **Proceed** button.
2. The **Distance** tab window displays.

**Note:** If the customer has mileage report for the previous IFTA reporting period, complete the table with the information the company reported on their Schedule B.

If the customer does not have an IFTA mileage report, use the Estimated Mileage for add the account/vehicles.

**Note:** Distance is not a requirement for a CMV Fleet. Intrastate accounts do not need to keep track of mileage. Weight groups will already be set up for CMV accounts.

1. Click the **Proceed** button, Confirm the information is correct and then **Proceed** again.

**NOTE**: When the state or county set up the fleet, they must also add at least one vehicle to the fleet before an outside entity (service provider) can access the account in KCoVRS. After the initial vehicle has been added to the fleet by the state or county, the service provider may pick up the work.

**You have completed Chapter 1 on County Transactions. You may now complete the summary exercise questions for this chapter.**