Massachusetts Registry of Motor Vehicles

ATLAS

Charitable Plate Organizations eServices Portal Help Documentation

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GENERAL eSERVICES PORTAL HELP

LOGGING ON TO THE eSERVICES PORTAL

Prior to first-time use to the ATLAS eServices Portal, first time users will receive an email from the RMV with a link to the eServices Portal logon page. User logons are added by your business’s eServices Administrator. If your business does not have an administrator, click the Learn More hyperlink on the eServices Portal logon page for more information.

To log on to eServices:

1. From the appropriate email, single-click the Click to log in hyperlink.
2. Type in a password that meets the requirements listed in the Password Rules section.
3. Re-enter the password in the Confirm Password field.
4. Click Submit.
5. Click OK.
6. Enter your username and password.
7. Click Logon.
8. Click the Send Authentication hyperlink to get a security code for this login. A pop-up window is displayed indicating that the confirmation has been sent to the user.
9. Enter the code into the Authentication Code field.
10. Click the Logon button.
LOGGING OFF THE eSERVICES PORTAL

To log off the eServices Portal:

1. Click the Profile Menu icon at the top right of the screen.
2. Click the Log Off hyperlink.
3. Click Yes.
4. Click Click Here to Start Over.

RESETTING A FORGOTTEN PASSWORD

In the event you are unable to remember your password, the portal allows for a password to be reset.

To reset a password:

1. Navigate to the log in screen for the eServices Portal.
2. Select the Forgot username or password? Hyperlink.
3. Enter your username.

   Your username should be your business email

4. Follow the instructions in your email.
**UpdAting YoUr PersOnAl PrOfile PrOFeSSionAl PrOfile InformatIon**

The *User Profile* in ATLAS contains information on the logged-on user. From here, you may have security to update your name, e-mail, and phone number. In addition, you may update your password, secret question, or two-step verification settings.

To update profile information in eServices:

1. Select the **Manage My Profile** hyperlink from the *Business Account* profile.
2. Select the appropriate hyperlink for the profile information you would like to update.
3. Enter the updated information.
4. Click **Ok**.

**UpdAting A PaSSwoRD**

Passwords can be changed by the user in the eServices Portal. Changing a password is not the same as resetting, and can be completed after successfully logging in.

To update a password in eServices:

1. Select the **Manage My Profile** hyperlink from the *Web Profile* screen.
2. In the Security panel select the **Change Password** hyperlink.
3. Enter the required fields, indicated by an asterisk.

The bottom of this window contains password requirements.

4. Click **Ok**.
VIEWING OTHER BUSINESS ACCOUNT PROFILES

If you have access to multiple businesses, you can switch the business account you are viewing. Access to additional businesses is granted to your username by that business’s eServices administrator. To view a different Business Account profile:

1. From the Business Account profile, click the Work With Someone Else hyperlink.

   If you only have access to view or work with one business, the Work With Someone Else will be hidden and will not display.

2. Click the Business Name button for the business you wish to view.

VIEWING SUBMISSIONS

You can view web requests, or transactions, you have submitted in the eServices portal by the following:

1. From the Business Account profile, click the More tab.
2. Click the Search Submissions button in the Submissions panel.
3. Enter a date range in the Processed From and Processed To fields that fall within the submission you are searching for.
4. Click the Search button.
5. Select the Title hyperlink to view the submission.
6. Use the Previous and Next buttons on the submission to view what was submitted to the RMV.
**VIEWING LETTERS**

You can view letters sent to your business in the eServices Portal.

To view letters on the *Letters* profile:

1. From the *Business Account* profile, click the **More** tab.
2. Click the **View Letters** button.
3. Click the **Type** hyperlink for the desired letter.
   - A PDF will generate of the letter.

   The Inbox tab displays letters for the last 12 months. To access letters older than twelve months, click the Search tab and enter the appropriate date range for the letter. Click the Search button to view letters in this date range.

To view unread letters in the Action Center:

1. From the *Business Account* profile, click the **Action Center** tab.
   - **Note:** The tab will have a counter on it for unread letters.
2. Click the **View Letters** hyperlink.
3. Click the **Type** hyperlink for the desired letter.
   - A PDF will generate listing the Permit ID’s issued for each permit type.
MANAGING PAYMENT CHANNELS

You may add and use payment channels in the eServices Portal. Payment channels are payment methods saved in ATLAS to be used when completing different transactions. This saves time of having to key in your payment method for each transaction.

To access Payment Channels window to manage payment channels:

1. From the Business Account profile, click the Manage My Profile hyperlink.
2. Click the More tab.
3. Click the Manage Payment Channels button.
   - You are now on the Payment Channels window.

To add a new payment channel:

1. From the Payment Channels window, click the Setup New Payment Channel hyperlink.
2. Select the Payment Channel Type.
3. Select the Bank Account Type.
4. Complete the required fields.
   a. Note: The Name of the Payment Channel defaults to the Bank Name and the last four digits of your Account Number. To update this, click the No button and update the Name field.
5. Click Save.

To rename a payment channel:

1. From the Payment Channels window, click the Payment Channel Name hyperlink.
2. Click the Rename hyperlink.
3. Complete the appropriate fields.
4. Click Save.
To remove a payment channel:

1. From the Payment Channels window, click the Payment Channel Name hyperlink.
2. Click the Remove This Payment Channel hyperlink.
3. Click Yes.
4. Click OK.
CHARITABLE PLATE ORGANIZATION FUNCTIONS

ADDING PLATE APPLICATIONS

To add new plate applicants for your charitable organization:

1. On the Business Account profile, select the Add New Applicants hyperlink.
2. If necessary, select the Import hyperlink to import an Excel spreadsheet with the applicants’ information.

   The Excel spreadsheet must have a sheet titled, “Applicants.”

3. To manually add applicants, select the Add a Record hyperlink and complete the necessary fields.

   Fields are provided for the organization to track how much was collected from each applicant. Charitable organizations are responsible for collecting the fee from their applicants.

4. Select Next.
5. Click the I Accept button to attest that the inputted information is true.
6. Select Submit.

   The confirmation can be printed from a PDF using the Printable View button.
**VIEWING AND MANAGING YOUR APPLICANTS**

You can view, update, or remove applicants for your plate prior to submitting the applications for your organization.

To manager your applicant:

1. Access your *Business Account* profile on the eServices Portal.
2. Select the **View/Manage My Applicants** hyperlink.
   - To update an applicant’s information, click the **Manage** hyperlink.
   - To remove an application, click the **Remove** hyperlink.

*Once your applications are submitted to the RMV, you will not longer be able to update or remove applications. However, you will still be able to view them using the View/Manage My Applicants hyperlink.*
SUBMITTING PLATE APPLICATIONS

Once your organization has surpassed the 750-applicant threshold, you can submit the plate application to the Special Plates Unit to review.

To submit the plate application:

1. On the Business Account profile, select the Submit Plate Application For Approval hyperlink.
2. Select Next.

   If you have not met the 750-applicant requirement, there will be a message listing how many more applicants are needed to submit the application.

3. Select Next.

   Remember: It is up to your organization to collect each $40 payment from the applicants.

4. Select Next.
5. Select the payment method.

   Money orders cannot be used to pay debt on the eServices Portal. Use of a money order will result in a bad payment and your applicant being delayed.

6. Select Next.
7. Complete the payment information, as necessary.
8. Select Next.
9. Input an email address.
10. Select Next.
11. Click the I Accept button to attest that the inputted information is true.
12. Select Submit.

ASSIGNED PLATES REPORT

To generate a report to see plate numbers your organization has assigned with the name and license number of the individual:

3. Access your Business Account profile on the eServices Portal.
4. Select the View Plates My Organization Assigned hyperlink.

![Info icon](image1) Use the filter field to filter by plate number or individual name or license number.

![Info icon](image2) You are able to export this report into an Excel spreadsheet using the Export hyperlink.

ISSUED PLATES REPORT

To generate a report to see the amount of plates that have been issued for your organization:

1. Access your Business Account profile on the eServices Portal.
2. Select the Issued Plates Report hyperlink.

![Info icon](image3) You are able to export this report into an Excel spreadsheet using the Export hyperlink.
**eSERVICES PORTAL ADMINISTRATOR FUNCTIONS**

**eSERVICES ADMINISTRATOR FUNCTIONS**

Each business with access to the eServices Portal has a designated eServices Administrator. This administrator oversees adding and managing logons for their business. Once a logon is added, however, only system access can be updated by the administrator. Any demographic information for the user must be updated by the logged-on user, not the administrator.

**ADDING A LOGON**

To add a logon:

1. Select the More tab from the Business Account profile.
2. Select the Add a New Logon button.
3. Enter the user’s email address and name in the appropriate fields.
4. Select the Grant Access button for all accounts you the user should have access to.
5. Select the Access Level for each account.
6. Select the Next button.
7. Select the I Agree button.

By selecting I Agree, you & your company are confirming the user has been vetted & meets requirements outlined in your access agreement. Your company is responsible for the user’s actions.

8. Select the Submit button.

An email will be sent to the e-mail address keyed in the transaction. The new user must follow the prompts in the e-mail to access the eServices portal.
RESENDING A LOGON ACCESS EMAIL

The logon access email is required for a user to logon for the first time.

To resend a logon access email:

1. Select the More tab from the Business Account profile.
2. Select the Manage Logons button.
3. Select the appropriate Logon hyperlink.
4. Select the Resend Logon Access Email hyperlink.
5. Select the Yes button.
6. Select the OK button.

MANAGING A USER’S ACCESS

To manage a user’s access:

1. Select the More tab from the Business Account profile.
2. Select the Manage Logons button.
3. Select the appropriate Logon hyperlink.
4. Select the Manage Access hyperlink.
5. Select the Access Type hyperlink.
6. Update the Type of Access through the drop-down menu.
7. Select the Save button.
** Cancelling a User’s Access **

Cancelling a user’s access means cancelling the access to a specific business or account. Cancelling access does not remove the logon from the portal.

To cancel a user's access:

1. Select the **More** tab from the *Business Account* profile.
2. Select the **Manage Logons** button.
3. Select the appropriate **Logon** hyperlink.
4. Select the **Manage Access** hyperlink.
5. Select the **Cancel Access** hyperlink for the business or account you are cancelling the access for.
6. Select the **Save** button.

** Reinstating a User’s Access **

To reinstate a user’s access (or grant them access):

1. Select the **More** tab from the *Business Account* profile.
2. Select the **Manage Logons** button.
3. Select the appropriate **Logon** hyperlink.
4. Select the **Manage Access** hyperlink.
5. Select the **Grant Access** hyperlink.
6. Update the Type of Access through the drop-down menu.
7. Select the **Save** button.
DEACTIVATING A USER’S ACCESS

Deactivating a user’s access means you are deactivating the user’s logon so they will not be able to log into the portal.

To deactivate a user’s access:

1. Select the More tab from the Business Account profile.
2. Select the Manage Logons button.
3. Select the appropriate Logon hyperlink.
4. Click the Deactivate Access hyperlink.
5. Click the Yes button.
6. Click the OK button.

REACTIVATING A USER’S ACCESS

To reactivate a user’s access:

1. Select the More tab from the Business Account profile.
2. Select the Manage Logons button.
3. Select the appropriate Logon hyperlink.
4. Click the Reactivate Access hyperlink.
5. Click the Yes button.
6. Click the OK button.