

June 22, 2020

## Phone, Email, Microsoft Teams, Skype Service

Process for completing motor vehicle transactions by phone, email, Microsoft Teams, or Skype for curbside pickup or mail service.

1. Determine which transaction(s) the customer would like to complete:
  - Renew registration
  - Apply for duplicate stickers
  - Apply for duplicate plates
  - Apply for a duplicate registration card
  - Report a sale/report a vehicle held for resale
  - Transfer specialty plates
  - Vehicle inquiry
    - How much their tabs are, is the vehicle still in their name, has their title been mailed out, has their registration been updated yet, etc.
2. Look up their record by:
  - VIN number
  - Plate number
  - Driver's license number
  - Name and date of birth
  - Business name
3. Have the customer verify the vehicle information and address on file.
  - a. If the customer is unable to confirm at least 3 or more items from section 2 they will not be able to complete their transaction(s) without coming in to an office.
  - b. If the customer is able to confirm at least 3 or more items from section 2 proceed with the transaction(s).
4. Determine whether or not the customer wants to do curbside pickup or if they want their order sent by mail.
  - a. If the customer prefers curbside pickup they will need to present their identification. If a customer opts for curbside pickup they will be able to update their address on file if it is incorrect.
    - i. Third-party pickup is available but a third-party request form or the bottom half of the renewal notice is required at time of pickup.

- b. If the customer decides to have their transaction(s) mailed they will not be able to change the address on file.
5. Fill out the necessary document(s).
- a. If the customer is renewing registration, you can just print the new registration card and no additional documents are required.
  - b. If the customer is conducting any other transaction, you will need to fill out the appropriate DVS forms. In place of the signature, capture the driver's license number and the phone number of the customer.
    - i. PS2067A/B for registration cards, duplicate stickers, or duplicate plates.
    - ii. PS2010 for transfer of specialty plates or duplicate specialty plates.
    - iii. An access log is required for all other inquiries where a transaction didn't take place. This is required for audit purposes.
6. Complete payment before submitting the transaction.
- a. For curbside pickup you can accept all forms of payment.
    - i. For cash and check payments pend the cart until the customer arrives and payment is received. It is recommend that customers paying by check have the check filled out in advance.
    - ii. For credit card payments; accept the payment in person, over the Phone, on Microsoft Teams, or Skype and then check out the cart.
      - 1. If any card information is written down you must shred it immediately after the transaction is finalized.
  - b. For mailed transactions, only credit card payments should be accepted.