Out of State Title Transfer

Now that we've learned how to perform an In-State Title and Registration Transfer, let's look at the other type of transfer – one from Out-of-State.

The Scenario:
Baxter York and his daughter Fibi have come into the office to transfer a vehicle they purchased in Florida to New Mexico. At this time, they do not have New Mexico credentials, but they have brought sufficient proofs of identity and residency.

Out of State Title and Registration Transfer	
New Manager springboard	
We will begin Out of State Title Transfers from the **Vehicle Management** manager.	
	Select **Vehicle Management** manager

Vehicle Management	
Since we the vehicle in questions is not already in Tapestry, we will select the **Title (and Register) a Vehicle** hyperlink	
	Select **Title (and Register) a Vehicle** hyperlink

VIN	
Just as we saw with the title transfer, we have started a Registration and Title activity. AND, just as we've seen before, it begins with the Vehicle Details section and VIN sub-section. When I first started the watch it for the In-state Title Transfer, I was on a sub-section exactly like this where I needed to enter VIN information. Before we enter the VIN, however, notice this checkbox to the right of the VIN field. If the vehicle does not have a VIN, selecting this checkbox will tell Tapestry to generate a New Mexico assigned VIN. So let's enter the VIN:	
VIN	**3TMLU4ENXBM061529**
When we tab off or make a selection anywhere else within the springboard, the VIN becomes masked and a second, **Re-Enter VIN** field appears. We must enter the VIN again in order to ensure accurate keying. Note that it isn't possible to copy and paste in either of these fields. So, let's re-enter the VIN.	
Re-Enter VIN	**3TMLU4ENXBM061528**
We have received a hard error telling us that the VINs do not match. As you can see, Tapestry will not allow us to continue if the VINs do not match. In this case, it is best practice to clear the text in the **Re-Enter VIN** field and enter the VIN again.	
Re-Enter VIN	**3TMLU4ENXBM061529**
Now the error has been resolved. You will also notice that we're not getting a duplicate VIN error. This is one way we know for certain that this vehicle does not already exist within Tapestry.	

VIN (cont.)	
Moving on, we encounter a **Secondary VIN** field. If the vehicle type requires a secondary VIN, enter it into this field. As before, we must tell Tapestry what **Transaction Type** we would like to perform.	
Transaction Type	Select drop-down arrow
Even though **1st Time Title** is an option, it's important to remember that this vehicle *does* have title. We need to *transfer* it, so we will select **Title Transfer** from the three options.	
Transaction Type	**Title Transfer**
Upon selecting **Title Transfer** Tapestry generates three more fields. Since we chose **Title Transfer,** Tapestry auto-populates the **Document Acquired** field to be Certificate of Title. As with the In-State Title Transfer, it is necessary to enter the **Previous Title Number** and the **Title State.**	
Previous Title Number	**906880136322**
Be sure to enter the Title Number carefully. It will be checked against most recent Title information for this vehicle as reported to NMVTIS.	
Title State	**FL – Florida**
With all fields in the section satisfied, we can proceed by selecting the **Next** action button.	
	Select **Next** action button

Vehicle Detail	
As always, the **VIN** sub-section is followed by the **Vehicle Detail** sub-section. When we did the New Mexico Title Transfer together, many of these fields pre-populated with information from the previous title already in the system. This vehicle has no record in Tapestry, though, so where did Tapestry get this information? VINQuery. Tapestry interfaces with this database so that when a VIN is entered, VINQuery sends Tapestry the information it has in its database. Sometimes there is information VINQuery doesn't have and sometimes the information it has is wrong. For example, it didn't send a **Declared Gross Vehicle Weight**. So we will need to enter it manually.	
DGVW	**6500**
Let's suppose that VINQuery also has the incorrect number of **Cylinders** for this truck. In order to make changes to information VINQuery sends to Tapestry, select the **VINQuery Override** checkbox.	
	Select **VINQuery Override** checkbox
Notice how most of the fields auto-populated from VINQuery are now editable. Let's change the **Cylinders** for this truck from 6 to 4.	
Cylinders	**4**
Now we'll complete the rest of the details for this vehicle, starting with the vehicle class. Since the Vehicle Type is Truck, we must manually select which Class of Truck.	
Vehicle Class	**11 - Truck**
Primary Owner Type	**Individual**
Color 1	**White**
Odometer Code	**Actual**
Odometer Reading	**76,678**
The odometer on this truck is read in miles so we will not change the units and there are no brands to be added to the vehicle. This vehicle is not being leased and there is also no lienholder so we will answer **No** to the next two questions.	

Vehicle Detail (cont.)	
Is this a leased vehicle?	**No**
Is there a lienholder?	**No**
Now we can proceed to **Insurance Information**	
Company	**Allstate**
Policy Number	**235869**
This owner does not have insurance in New Mexico, but they do have insurance from Florida, so let's change the state from the default **NM** to **FL**	
State	**FL**
Tapestry has generated a soft-error that we need to either correct or review. It states that the **State does not satisfy NM Liability Requirements**. This means that without additional documentation, we cannot accept insurance from Florida. However, if the owner can show that their insurance does meet the liability requirements of New Mexico, we can select the **Review** icon and continue. In this case, the owner has brought in an Insurance Declaration to assert that their liability requirements are high enough. So we will review the error and continue.	
	Select **Review** icon
Notice that the **State** field now has a green triangle in the upper left corner to signify that the entry has been reviewed. Now we will enter the **Effective Date** and **Expiration Date**	
Effective Date	**Today's Date 09/11/2017**
Expiration Date	**02/11/2017 change to 2018**
	Select **Next** action button

Ownership Information	
The Owner must supply of listed documents in the **Proof of Identity** field.	
Proof of Identity	**Reservist Military ID**
In this scenario, the owners of the vehicle do not have New Mexico credentials and do not want to provide their Florida credentials. Even though they are *probably* not in Tapestry, it is best practice to search for them anyway. So let's enter the primary owner's **SSN** and search for it in Tapestry.	
SSN	**735-07-1134**
	Select **Search for Owner** action button
Tapestry did not pull in any information for the owner, so we will enter as much information as possible. Let's start with the required information, the **Last Name**	
Last Name	**York**
Entering a **Last Name** without a **First Name** generates a soft-error to confirm that the individual does not have a first name. In this case, the owner does have a **First Name** so we'll enter that before moving on to **Date of Birth.**	
First Name	**Baxter**
Date of Birth	**11-26-70**
Baxter does not have a DBA or Veteran's Certificate Number so we'll leave these fields blank. He is willing to provide his **Email Address** and a **Telephone Number** though, so let's enter those.	
Email Address	**BaxAndFibi@email.com**
Phone Type	**Home Phone**
Telephone Number	**505-152-2748**
Before we enter Baxter's daughter as the secondary owner, let's take a look at the **Title Assignment**. It currently reads York Baxter according to the name we entered above. Now let's enter his daughter, Fibi, as a secondary owner joined with AND by selecting the **Add Additional Owner** hyperlink.	
	Select **Add Additional Owner** hyperlink
Owner Type	**Individual**
Relationship	**And**
Like her dad, Fibi only has an **SSN** to provide us. So let's enter it into the **SSN** field and search for her in Tapestry as well.	
SSN	**637-55-3611**
	Select **Search for Owner** action button
As with Baxter's, Tapestry does not pull back any information for this Social Security Number, so we will enter Fibi's information manually. Since she and Baxter share an email address and phone number she declines to provide any additional contact information.	
First Name	**Fibi**
Last Name	**York**
Date of Birth	**4-2-99**
	Hover over **Title Assignment**
Now that we've added the secondary owner, the Title Assignment has updated to reflect the AND conjunction and the second name. Notice that Tapestry does not state **York** twice. If individuals on a title share a last name, Tapestry will save space by only listing the last name once.	

Ownership Information (cont.)	
Finally, we need to confirm the capture of required signatures on the Florida title. Then we can select the **Next** action button to continue.	
Are all required signatures captured?	**Yes**
	Select **Next** action button

Owner Address	
Since our Primary Owner is not already in Tapestry, the **Owner Address** sub-section contains more than just address fields. There is additional information to capture regarding proof of residency that is required since the owner did not provide a NM Credential.	
Proof of residency	Select drop-down arrow
The owner must provide 2 documents that prove residency. Tapestry wants to confirm that the owner has them here. Baxter did bring a bank statement and rental agreement.	
Proof of Residency Document	**Bank Statement**
Proof of Residency Document 2	**Rental or Purchase Agreement**
Now we can enter Baxter's physical address.	
Single Line	**1409 Girard NE Albuquerque**
	Select **Verified** hyperlink
	Select **apt a-e**
What unit will it be?	Enter **A**
We can continue to the **Mailing Address**. Baxter does have a mailing address, so in order for the mailing address fields to display, we'll select **No** from the drop-down. Then we'll be able to enter a mailing address.	
Is Owner's Mailing Address same as physical address?	**No**
Single Line	**21 Apple Ranch Rd 87059**
This address also verifies so finally we ask Baxter if he would like to add a Renewal Address. In this case he does not so we will select Yes from the drop-down menu.	
Is Owner's Renewal Address same as physical address?	**Yes**
Proving identity, residency, and entering verified address, all fields within this **Owner Address** sub-section are satisfied so we can select the **Next** action button to continue.	
	Select **Next** action button

Emissions Req
This is a sub-section we have not seen before. The reason we are seeing it in this exercise is because the vehicle meets the criteria for emissions compliance including age and vehicle type. Additionally, the physical address of the owner is in Bernalillo County which means the vehicle must meet the emissions requirements for that county.

Emissions Req (cont.)

For the most part, it will not be necessary for you to enter information into the sub-section. Tapestry will interface with AirCare to determine if vehicles required to meet emissions requirements are in compliance. In that event you will simply select the **Next** action button to continue. **YOU WILL NOT NEED TO HAVE DOCUMENTATION OF THE EMISSIONS TEST IF AIRCARE PROVIDES AN EMISSIONS STATUS.**

However, it is possible that AirCare's system might be down or that the emissions test results have not been uploaded to AirCare by the time the owner is trying to title and register their vehicle. In that case, this sub-section will appear like this: with the red warning message at the top that says

Emissions Status Not Found for VIN

In this exercise, we'll practice entering emissions test information manually.

First, let's try to select the **Pass** selector button.

	Select **Pass** selector button
Nothing is happening, because we need to select the **Input Emissions Manually** checkbox first.	
	Select **Input Emissions Manually** checkbox
Now we can select either the **Pass** or **Fail** selector button. If I select **Fail**, Tapestry generates a hard error because it is necessary for this vehicle to pass emissions requirements in order to be registered.	
	Select **Fail** selector button
So let's all select the **Pass** selector button.	
	Select **Pass** selector button
Then we'll need to denote if the emissions test is good for 1 year or 2 years. The documentation Baxter gives us says 2 years.	
	Select **2 Year** selector button
Finally, we need to enter a **Date Taken**	
Date Taken	**09/20/2017**
There are zip codes that register as being part of Bernalillo County but are actually split among Bernalillo, Sandoval, and Santa Fe Counties. If the owner can prove that they live in Sandoval or Santa Fe County, they will not need to meet emissions requirements. In this case, select the **Override Emissions Requirement** hyperlink. The override does call for a manager's credentials to be entered. With all fields in this sub-section satisfied, let's select the **Next** action button to continue.	
	Select **Next** action button

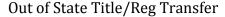| *Purchase Information*	

Having completed the **Emission Details** section, Tapestry takes us to the **Required Documents** section. The first sub-section we need to address is the **Purchase Information** section. This section will have the same set up that we saw when we performed the In-State Title Transfer. So let's start by selecting a **Purchase Type.**
 	
Out of State Transfers will generally have one of four purchase types:
   1) None – where the owner presents us with an OOS title in their name
   2) Out of State Dealer – where the owner presents us with an OOS title from a dealer in another state
   3) Out of State Transfer – where the owner presents us with an OOS title from another individual in another state
   4) Gifted – paid no monies
 	
These explanations might get confusing at times and new clerks will need time to assimilate this information. So to help you determine which **Purchase Type** is appropriate, select the **Information Icon** on the **Purchase Type** drop-down.	

Purchase Type	Select **Information** icon
Whenever we select the information icon on a drop-down menu list, an extra window displays with more information about the options in that drop-down. See how this list differentiates between OOS Dealer and OOS Transfer. We also have information on what Purchase Types will charge the customer Excise Tax. The nice thing about these windows is that you don't need to close the window to continue. Simply select the option you'd like by selecting the hyperlink of the selection.	
Purchase Type window	Select **Out of State Transfer** hyperlink
Next we need to enter the **Purchase Price** and **Purchase Date.**	
Purchase Date	**01/25/2017**
Purchase Price	**$15,000**
	Select **Next** action button

Documents

In the **Documents** sub-section we can see that all of the documents needed for this transaction have presumably been collected except for the **VIN Inspection**. Let's collect it now and mark it as collected, by selecting the appropriate checkbox.	
VIN Inspection	Select **Collected** checkbox
Upon selecting this checkbox, Tapestry needs to collect additional information about the VIN Inspector. First is the **Inspector Type**: Civilian or Law Enforcement. In our case, it is a civilian.	
Inspector Type	**Civilian**
Then Tapestry wants to know if it was an in-state inspection. This is because we need more information for In-State inspectors. This will default to **Yes**. Now we must enter the **Date of Inspection**. Remember, in-state inspections are good for 90 days and OOS inspections are good for 30 days. Let's see what happens if we enter a date into this field that is more than 90 days in the past.	
Inspection Date	**03/01/2017**
As you see, we get a hard error telling us that the VIN Inspection is no longer valid. It looks like we fat-fingered the date so let's correct it.	
Inspection Date	**09 20 2017**
This corrects the error and we can proceed. The next field is to enter the **Inspector Id Number**. Tapestry tracks New Mexico VIN Inspectors so you must enter a valid **Inspector Id Number.**	
Inspector Id Number	**1261**
Tapestry generates another hard stop, this time to tell us that the Inspector ID was not found. Let's correct the **Inspector Id Number**.	
Inspector Id Number	**126111**
If the VIN inspector is expired, Tapestry will not let you continue, but it doesn't generate a hard error the way an invalid inspector ID does. Scan documents!!! Let's select the **Next** action button to proceed.	
	Select **Next** action button

Registration

Here we are in the **Registration** sub-section. The Yorks do not have a New Mexico plate to place on the vehicle so we will leave the **Use Existing Plate** field defaulted to **No.** We need to enter the Plate Type and Registration Term that the owner wants.	
Plate Type	**Turquoise Plate**
Registration Term	**1 Year**
As we have seen before, Tapestry automatically calculates the **Expire Date**. With these fields satisfied, let's select the **Next** action button to proceed to the **Plate Information** sub-section.	

	Select **Next** action button

Plate Information	
As always, the three fields in this sub-section are not editable. **Plate Type** and **Plate Description** auto-populate based on choices in the previous sub-section. The **Plate Number** populates based on your inventory. Let's suppose that when we go to pull the next plate from our inventory for this customer that we find the plate damaged. If we select the **Damaged** action button, the next plate in our inventory will be pulled in and this plated will be marked as Damaged in the background. It is not necessary to get a manager's approval for marking a plate as **Missing** or **Damaged**.	
	Select **Damaged** action button
The next plate number in your inventory is now assigned as the **Plate Number** for this vehicle. As long as this plate number is not missing or damaged, we can select the **Next** action button to continue.	
	Select **Next** action button

Fees	
Finally, we come to the **Fees** sub-section. There are more bill items in this sub-section that we have seen before. Notice how Tapestry lists out the various fees: Late Penalty, Excise Tax, Plate Fees, Registration Fees, and Title Fees. Verify that the owner has payment for the total amount due. ($759.20) If they do not, we would select the **Save** action button so that the activity will be available within Tapestry for the next 90 days. However, as long as the customer has a form of payment we can select the **Next** action button to continue.	
	Select **Next** action button
Bypass signature pad (customer verified info)	Select **Bypass signature pad**

Summary	
Now we can select the **Submit** action button to complete the Title Transfer. Since this vehicle did not exist in Tapestry prior to this activity, selecting the **Submit** action button creates a new **Vehicle Customer** as well as a new **Vehicle Ownership Account.**	
	Select **Submit** action button

Vehicle Customer springboard	
Recall that in Tapestry, a customer is considered the highest, or outermost layer of the customer-account-activity structure. Consequently, Tapestry automatically navigates to the **Vehicle Customer** springboard once it is created. You can see in the **Customer Attribute** section what we entered into the activity. However, a Title Number has been generated by Tapestry.	

Just as with the New Mexico Title Transfer activity, the **Vehicle Ownership Account** will remain a system-generated number until payment is taken. Similarly, no **Expires** date will display either.

Without accessing any of the sub-tabs we can see by the counters that there is 1 title, 2 owners, and 1 odometer record. This is consistent with what we entered while completing the OOS Transfer.

Let's access the **Vehicle Ownership Account** springboard before taking a payment.

Accounts sub-tab	Select **Account ID** hyperlink

Vehicle Ownership Account springboard	
There is no **Registration** or **Title** status yet because we haven't accepted a payment, demonstrated by the balance shown in red text. In the **Account Registration History,** the New Reg account type is not yet a blue, selectable hyperlink. Let's select the **Accept a Payment** action button to complete the transaction.	
	Select **Accept a Payment** action button
We will be accepting a check for this payment.	
Individual Payment Type	Select **Check**hyperlink
Routing #	**112201218**
Account #	**548796**
Check #	**3658**

Cashiering Payment	
Select the **Save** action button to process the payment.	
	Select **Save** action button

Cashiering Interaction	
We now need to print our documents. What header button can be used to do this?	
	Select **Quick Print** header button
Once the documents have been printed, close the IE tabs.	
	Close Registration **IE tab**
	Close Application/Receipt **IE tab**
	Close Title **IE tab**
Finally, we'll return to the **Vehicle Ownership Account** springboard by selecting the **Ok** action button.	
	Select **Ok** action button

Vehicle Ownership Account springboard

We are now returned to the Vehicle Ownership Account springboard. Let's take note of how things have changed.
    1) The balance is now 0.
    2) There is now an Expires date in addition to the commence date
    3) There are now Title and Registration statuses
    4) The Account ID in the Account Attributes section has been replaced with the Plate number and Plate Type
    5) In the Account Registration History, the **Account Type** is now a blue, selectable hyperlink.
 	
Before returning to the **Vehicle Customer** springboard, notice the **Owners** section to the right of the **Account Attributes.** We see that Baxter York is the primary owner and his daughter is the secondary owner. His name is in hyperlink form, but hers is not.   When individual owners do not initially exist in Tapestry, Tapestry will use the SSN of the primary owner to create a **Non-Driver Customer** shell. Let's select the **Baxter York** hyperlink to see what this looks like.

	Select **Baxter York** hyperlink

Individual Customer springboard
This springboard is an **Individual Customer** springboard. However, it was not created by entering citation information or creating a credential for Baxter. This **Individual Customer** was created the same time the **Vehicle Customer** and **Vehicle Ownership Account** were created. You'll notice that in the **Accounts** sub-tab, there is only one account and it is not a credential. It is the **Vehicle Ownership Account** identified by the Plate number. There is also an icon on this row. Look closely and you'll see that it resembles a piece of chain link. This is to signify that the Vehicle Ownership Account is *linked* to this individual – not *owned* by this individual. Let's take a moment to observe the **Navigation Panel.** Tapestry has put the **Vehicle Customer,** the **Vehicle Ownership Account** , and the **Individual Customer** in a single group to denote that they are all connected. Let's utilize the **2011 Toyota Tacoma TW** hyperlink to navigate directly to the **Vehicle Customer** springboard.

Navigation Panel	Select **2011 Toyota Tacoma TW** hyperlink

Vehicle Customer springboard

Now that the transaction has been paid for, we can see:
    • the system generated account numbers have been updated to display the vehicle's **Plate Number**
    • there is now an **Expires Date** on the account listing
    • below the title number are also a title type and an issued date
 	
Select the **Close All Managers** icon in the **Navigation Panel**

Navigation Panel	Select **Close All Managers** icon