Kentucky

U

Drive

It

Online

Program

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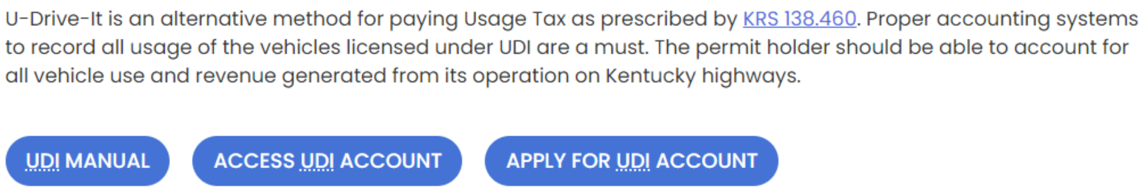
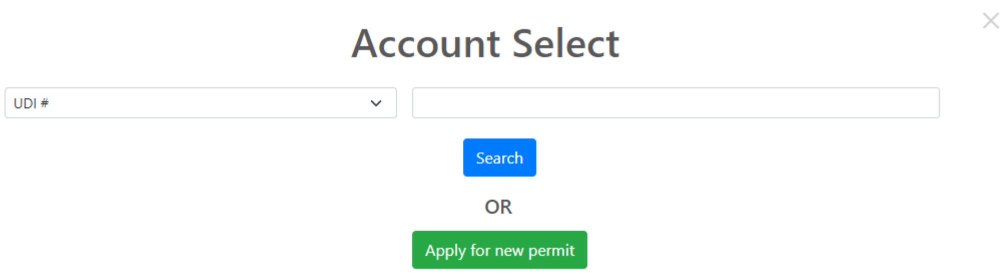
Logging In/Creating an Account

To log in or create an account, users should go to drive.ky.gov, then click on “Motor Carriers”; then “U-Drive-It”.



If you already have an account, you will click on the “**Access UDI Account**”, and use the “**Public Login**” to login in, with that information. If for some reason they cannot remember their password, you just need to do the “**Forgot Password**” option.

Once logged in, you need to select the account that you are wanting access to. This is the UDI number you maintain or need to have access to.

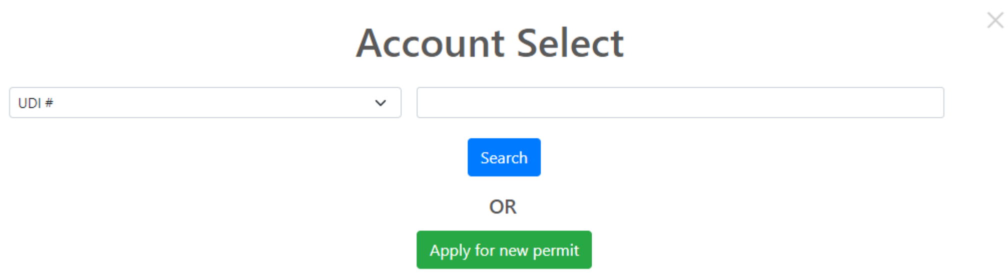


Any person who handles the account can approve you, or if there is no one to approve the request, you can email the UDI box (udi.dmc@ky.gov) and request the approval.

Applying for a Permit

You will need to create an account before doing anything else. Once you have created an account instead of entering a permit number, you need to select the “**Apply for UDI Permit**”.

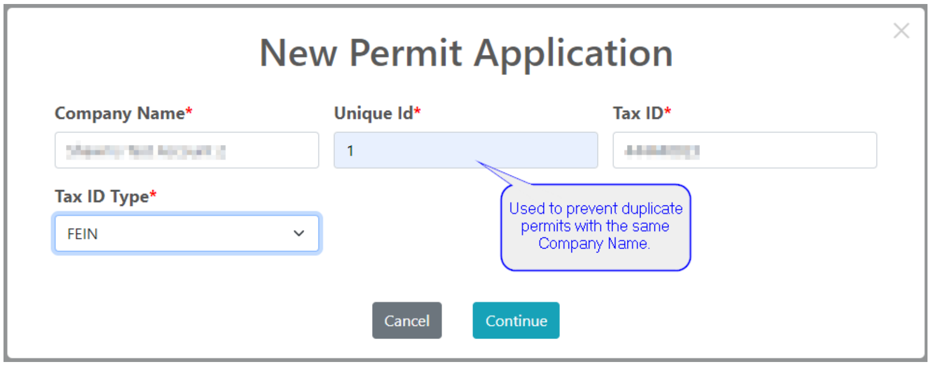
After they have created an account, they will need to apply for a permit. Users select Apply for new permit and fill in the data on the screen.



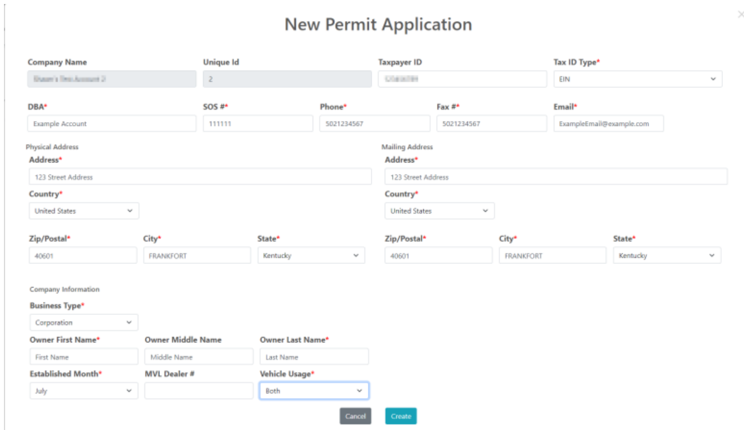
Required fields are marked with an asterisk and must be filled in to move forward. They are:

- Company Name:
- Taxpayer ID Number:
- Tax ID Type:
- SOS# (Kentucky Secretary of State Number, which you can find on their certificate):
- Phone:
- Fax (If you don't have a fax, you can enter either the phone number or 0):
- Email:
- Physical Address:
- Mailing Address:
- Business Type:
- Established Month:
- Will you lease/rent/or both:
- Owner First/Last Name:
- Owner Email:

You will also have to enter a Unique ID.



Since some companies may want to have multiple permits for their different locations, the system requires a unique id to distinguish between these. Please use "1" as your Unique Id, unless this is the second permit you are applying for. Entering multiple numbers as your Unique Id could result in you actually entering a valid UDI Permit number.



After this information is entered and complete, hit “**Create**”.

Once you have hit create, this will create your account and assign you your UDI Permit number after all required documentation has been approved. This will always be UD, and then 4 digits. (ex. UD1234). This will also create your $250 application fee in the bill section.

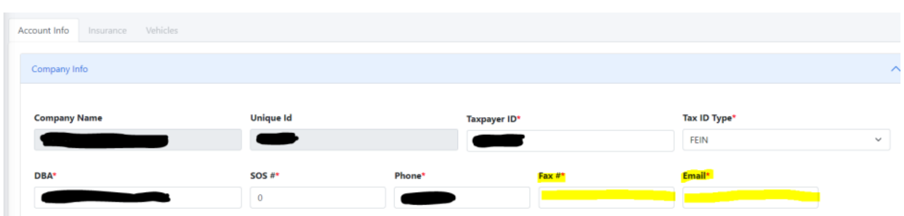
Once in the Account (If Migrated from Previous System)

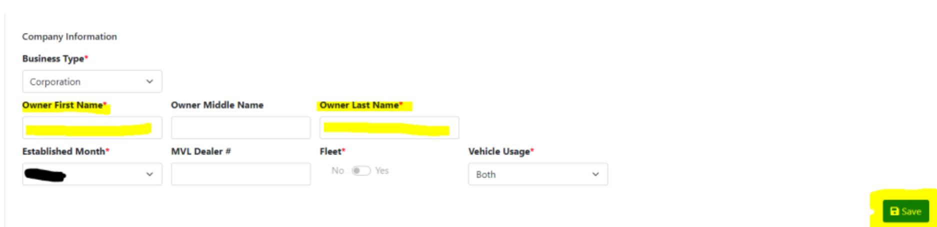
Once you have gotten into the account, you will need to make sure that all of your information is correct and up to date.

On the Account Info Tab

- You need to fill in the Fax # (you can copy and paste the phone number if you don’t have a fax)
- You need to fill in the Email
- You need to fill in the Owner First Name and Owner Last Name
- Then hit **Save**

ALL OF THIS IS REQUIRED INFORMATION.



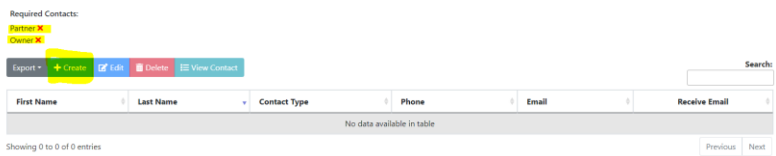


Once you have completed the main information, you will need to update the information that is listed in the next section.

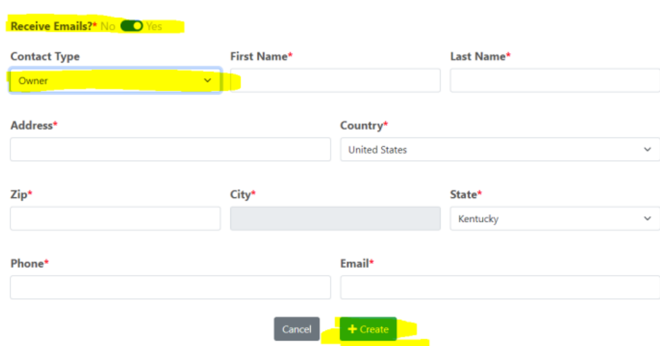
Once in the Account (If Created by Permit Holder)

CONTACTS:

- You will need to enter the Owner and Partner (If there is a Partner listed with a red X beside it, you must enter a partner. This can be the person that is going to receive the emails, but someone has to have that contact type before the system will complete the registration) and at least one person has to receive the emails from the system.
    - As most Owners/Partners do not want to receive these emails you can turn that function off for them, but at least 1 person has to be on there to receive the emails.



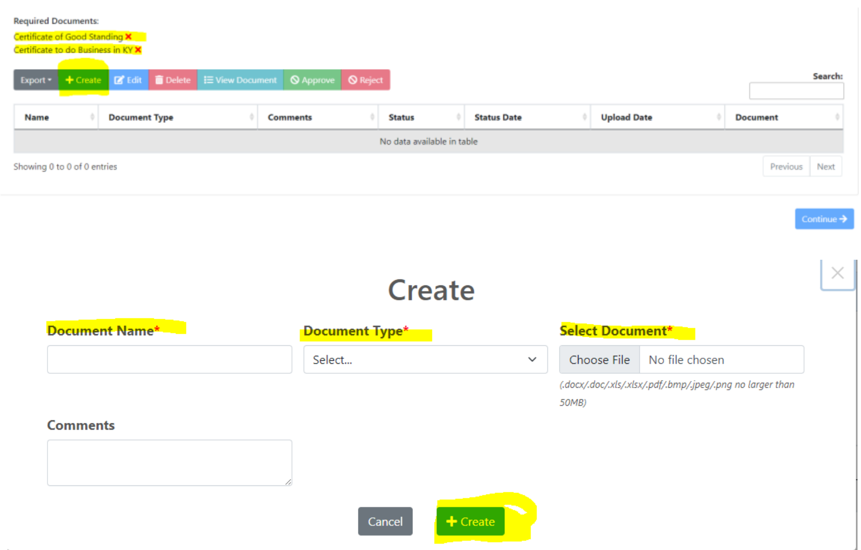
- You will click on the **Create** button to add each person.
- Select whether they will receive the email or not (the person receiving the email can be the Service Provider under Contact Type if there is already an owner/partner listed)
- After all information has been entered, you will hit **Create** and the information will be stored.



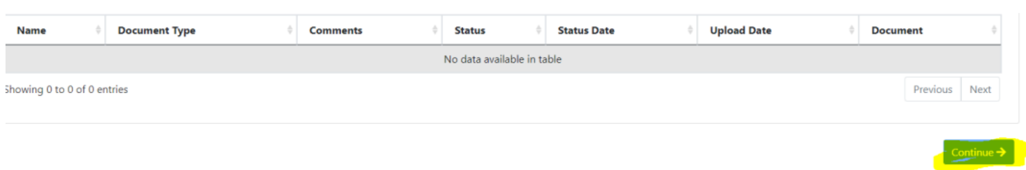
DOCUMENTS:

- Here you need to upload a Certificate of Good Standing (from your base State or Incorporation State if you are outside of Kentucky) and a Certificate to do Business in Kentucky (also called Certificate of Authorization; Existence; or Authority). **(These have to be current, and not the original. The date on the certificate cannot be older than 10 days from the date of submission)**
- Like the Contacts, you will click on **Create** to upload the document.

- Type in the Document Name
  - Document Type
  - Select Document to upload
- Then hit **Create** to have the document entered in the system.



- After you have done that, you can click the Continue Button in the bottom right corner.



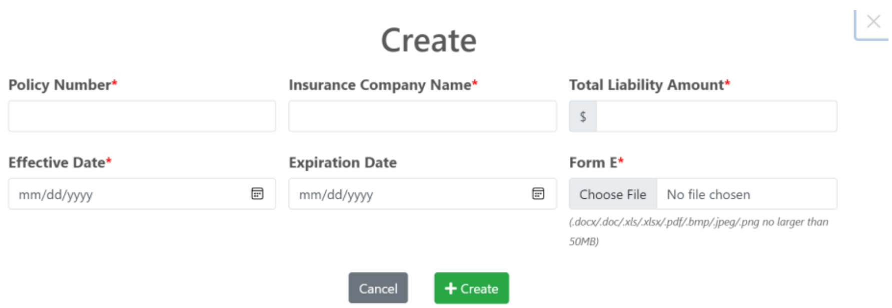
If one of your documents is rejected for some reason, there will be an icon beside "Rejected" that gives the reasoning it is rejected. The system also sends out an email with the same comments on it.

Just hover over the icon, and the reason will show.

The only documents that should be in this section are the 2 certificates. Anything else loaded in here will be rejected.

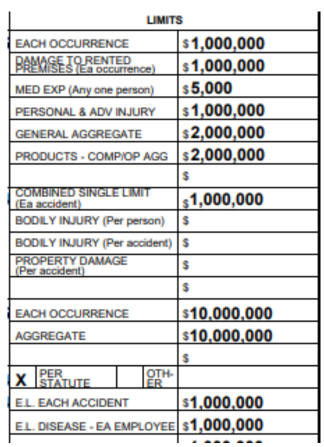
INSURANCE:

- This is where you will upload your Form E or the Certificate of Insurance. This is the Commercial Liability Insurance you are required to carry under KRS 281.655; not the leasor's/renter's individual insurance.
    - **PLEASE NOTE:** If you upload the certificate of insurance, we require the certificate to outline the requirements that is listed in the State Statute KRS 281.655; that requires all UDI permit holders to have insurance (regardless of the overall limit you might have or have listed on the certificate):
        - Death of Injury to Any One Person - $100,000.00
        - Death of Injury to Any to Persons - $300,000.00
        - Property Damage - $50,000.00
- As with the Documents on the Account Info Tab, you will create and upload your insurance form.



- If you are using Form E, these do not expire, and can put a far-off future expiration date on them. (When I upload, I use the expiration year as 2200).
- <u>If you are using the Certificate of Insurance and enter an expiration date, you need to upload a new and current certificate by that date.</u>
- **PLEASE NOTE:** We do not accept individual insurance cards as proof of insurance. Only the Form E and Certificate of Insurance is accepted.

This is what a approved Certificate of Insurance looks like.



LIMITS	
EACH OCCURRENCE	$ 1,000,000
DAMAGE TO RENTED PREMISES (Ea occurrence)	$ 1,000,000
MED EXP (Any one person)	$ 5,000
PERSONAL & ADV INJURY	$ 1,000,000
GENERAL AGGREGATE	$ 2,000,000
PRODUCTS - COMP/OP AGG	$ 2,000,000
	$
COMBINED SINGLE LIMIT (Ea accident)	$ 1,000,000
BODILY INJURY (Per person)	$
BODILY INJURY (Per accident)	$
PROPERTY DAMAGE (Per accident)	$
	$
EACH OCCURRENCE	$ 10,000,000
AGGREGATE	$ 10,000,000
	$
X PER STATUTE / OTH-ER	
E.L. EACH ACCIDENT	$ 1,000,000
E.L. DISEASE - EA EMPLOYEE	$ 1,000,000

While not all the fields have to have amounts in there you can see the top section list out what amount will be covered for each type of occurrence, and not the overall limit.

Once all of this has been submitted UDI Staff will have to go in and approve these forms for you to continue.

If one of your documents is rejected for some reason, there will be an icon beside "Rejected" that gives the reasoning it is rejected. The system also sends out an email with the same comments on it.

Document Type	Comments	Status
Certificate to do Business in KY		Rejected

Just hover over the icon, and the reason will show.

SELF-INSURED STATUS:

If you are wanting to be Self-Insured in the UDI system, you first have to have approval of this status from the Public Protection Cabinet, Department of Insurance.

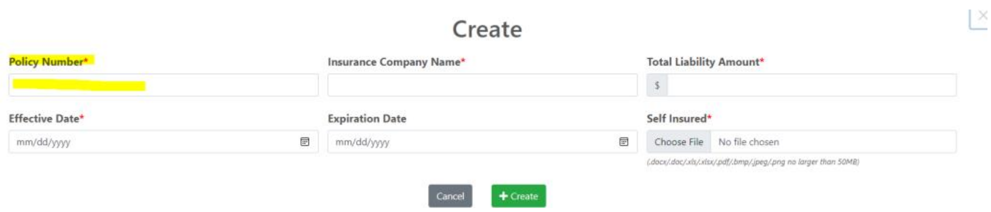
Once you have that, you can petition the Transportation Cabinet by submitting a written petition to the Cabinet, submitting the approval letter from the Department of Insurance, and your latest business financials. Submit those via email to udi.dmc@ky.gov and they will be forwarded to the appropriate management for review and approval/denial.

If approved, your permit will be updated and you will need to upload the approval order along with the documentation to the system.

SELF-INSURED STATUS – FILING QUARTERLY FINANCIALS:

If you have been approved as "Self-Insured" you will have to file your quarterly financials in the system. You will do this in the insurance tab. Like the insurance you will follow the same steps:

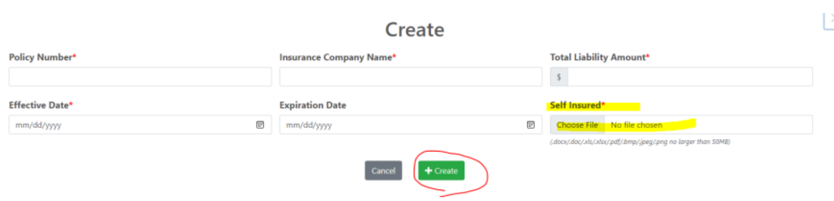
For the policy number you will enter Self-Insured



For the Insurance Company you will enter the quarter you are filing (Example: first quarter of 2024 will look like 1Q24 Filing).

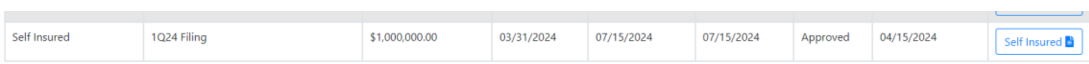
You will enter your insurance amount that you are covered, the effective date of your policy, and the expiration date. The system will put a cancellation date after the next quarter.

The document that you will upload before creating needs to have the quarter financials, and your self-insured approval letter from the Department of Insurance. Upload and then hit create.



This will then have the system generate a notification for us to review your documentation and approve/reject for the next quarter.

Your screen should look like this when completed.



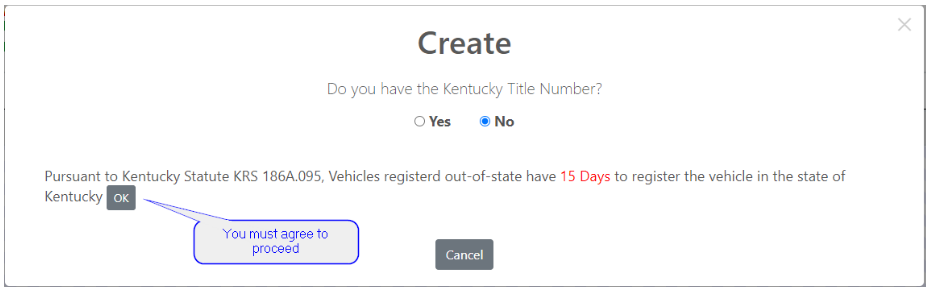
VEHICLE TAB

Once all of this information has been approved the Vehicle Tab will become available.

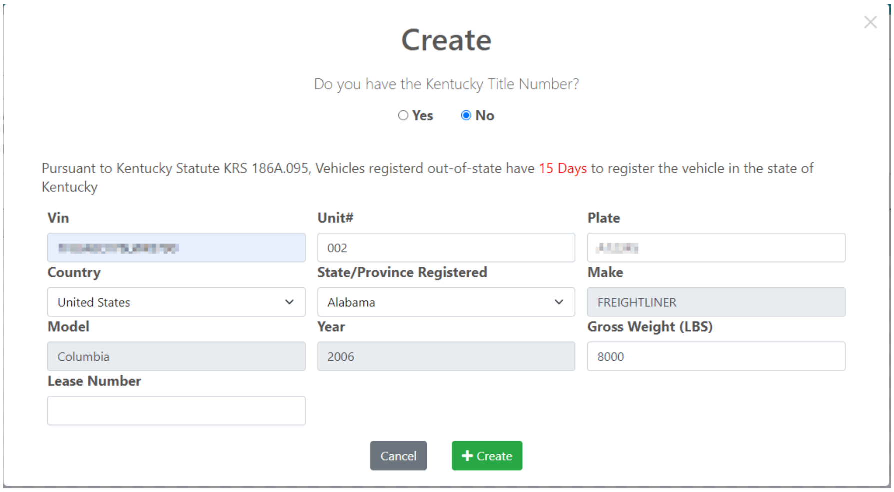
- Once this has been opened
  - You will need to enter your inventory here.
  - These will populate on your monthly bill each month regardless of if you collect taxes on them that month or not. **<u>You must enter your entire leasing vehicle inventory in this tab.</u>** We no longer do it month-by-month like the old system.
  - You can do this one of 2 ways:
    - Individually on the page, or
    - By using the "Download Upload Template" **(You <u>cannot</u> use the "Export" option for this).**
  - Steps for Individual:

- Select the "**Create**" Button

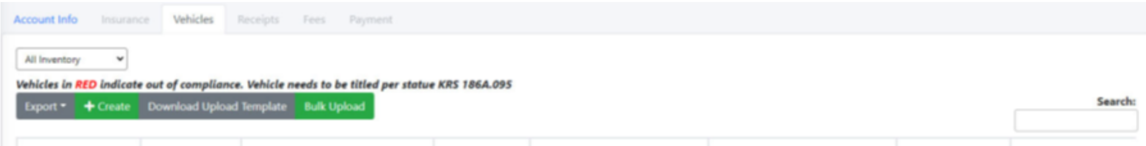
Do you have a Kentucky Title Number? – Select No. We are in the process of removing this completely from the system, but it still asks if you have it. We have had various issues with Title numbers and ask that you do not enter it.



Enter all required information on the screen. Unit Number is the number that you assign the car in your system (can be last 4 of VIN; 1, 2, 3, etc.; A, B, C etc. Just has to be something in the field that is not duplicated). The gross weight has to be entered to make sure your insurance is meeting the State Statute requirements. If you do not know the plate number of your vehicle, you can enter "TEMP".

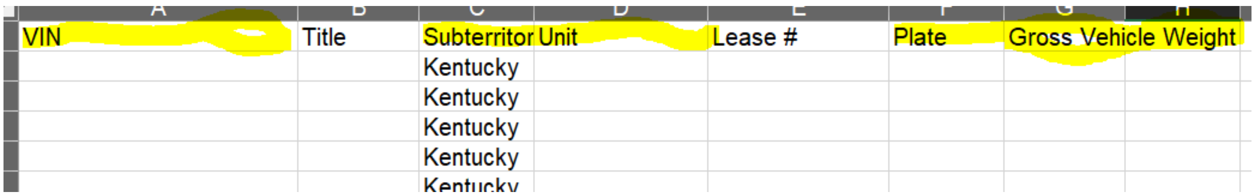


If you prefer to do the "Download Upload Template", you click on the option and then open the excel sheet **(PLEASE NOTE: The Export option <u>does not work</u> for the "Bulk Upload". It is just for you to export what is on the screen).**



THIS DOCUMENT CANNOT BE CHANGED IN ANY WAY. THE FORMAT THAT IT IS IN IS THE WAY IT HAS TO STAY IN ORDER TO UPLOAD IT BACK. DELETING A TAB, OR CHANGING FORMAT WILL HAVE THE SYSTEM REJECT IT AUTOMATICALLY. SIMPLY JUST ENTER THE INFORMATION REQUIRED INTO THE ROWS.

This document will open to the second tab. Do not do anything to this tab. Just click on Sheet 1.



You will need to enter the required information:

- VIN
- SubTerrirtory (Should always be Kentucky spelled out, no abbreviation)
- Unit # (Unit Number is the number that you assign the car in your system (can be last 4 of VIN; 1, 2, 3, etc.; A, B, C etc. Just has to something in the field that is not duplicated).
- Plate # (If you do not know the plate number of your vehicle, you can enter "TEMP.)
- Gross Weight (The gross weight has to be entered to make sure your insurance is meeting the State Statute requirements.) (This should be numbers only. No commas, no decimals, just numbers. Ex. 10,000 should be 10000)

Once you have all of this information entered, save the document and then click on the "Bulk Upload" option in the tab and chose your document. The system will run through your information and if all information is entered it will upload. You will receive an email letting you know if it was successful or not. If it was not successful, it will tell you what lines it didn't like and why.

(**NOTE:** You do not need to have extra lines with information in it. The system will think you are missing information and will reject it. Only have information in the lines that you need.)

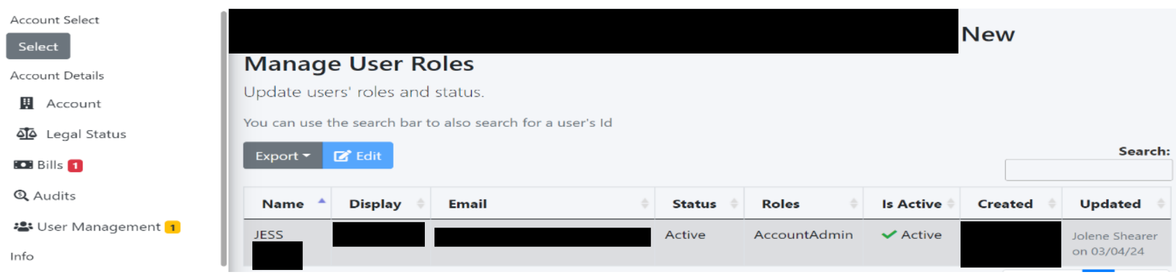
This process is what you will use any time you need to upload vehicles. It is your preference how you want to upload. You can do manual or the download upload.

DELETING VEHICLES

You cannot delete vehicles from the system. Only UDI Staff can do that. If you are needing vehicles deleted from the system, you need to email UDI at udi.dmc@ky.gov the bill of sale, auction slip, transfer title or out-of-state titled. Without these documents we cannot delete the vehicle, especially if there is still an active title in the county clerk's system.

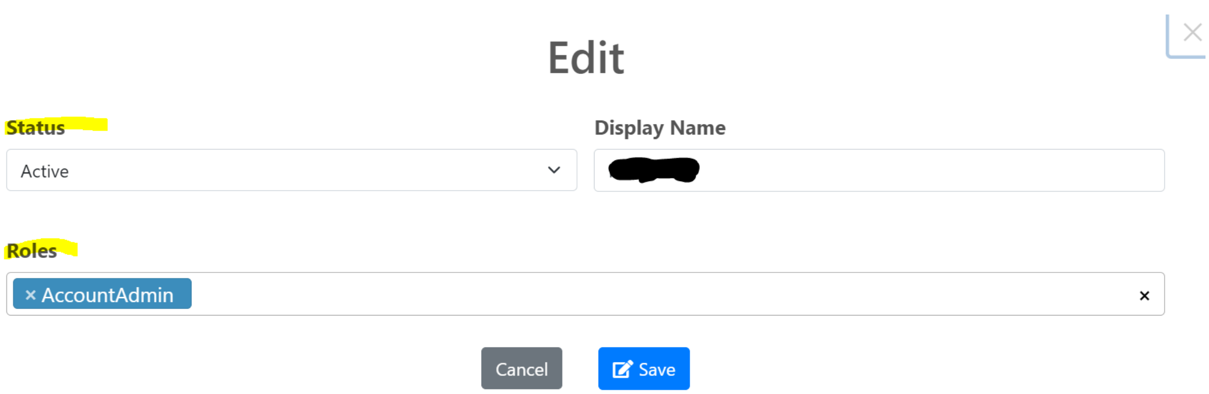
User Management Tab

This tab is where you can see who has access to the account to make changes and pay the bills. The person who applies and creates the account will be listed here as the AccountAdmin.



TO APPROVE SOMEONE:

1. You will highlight the person's row, and then select "**Edit**."
2. You will change their "**Status**" to **Active**.
3. You will select "**AccountAdmin**" under "**Role**"
4. Then hit "**Save**".



You will do the same process if someone leaves. You will just change the "**Status**" to **Inactive**.

If someone has requested access to the account and you do not know who they are, then you can either make them **Inactive**, or **Deny** them.

Bills

The Bills tab is where you will enter your receipts into the system for the month. Please remember that U-Drive-It runs a month behind, you will always enter the previous month receipts. *i.e.* In March, you will enter February's receipts, ***on February's bill***. These monthly returns are always due by the end of the next month. *i.e.* February's bills will always be due March 31st.

Please remember that with this new system, the bills pull from your inventory tab. There are no more bills with just the vehicles you owe money on for the month. They <u>**all**</u> show on every bill.

To enter the receipts for the month, you will select the month you are needing to pay, and then click on the "**View/Pay Bill**" button.

Export ▾ View/Pay Bill

ID	Status	Tax Cycle	Type	Created
23814	New	3-2024	Monthly Tax	03/1/2024
23537	Paid	2-2024	Monthly Tax	02/1/2024
20683	Paid	1-2024	Monthly Tax	01/5/2024

You will see that your vehicle inventory has populated here in this monthly return.

Export

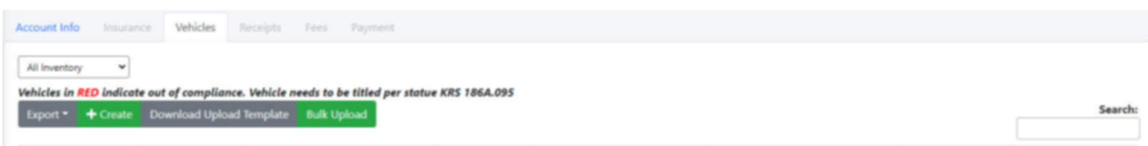
Search:

Tax Month	Vin	Plate Number	Lease#	Receipts	Tax
2024January	[redacted]			339	20.34
2024January				429	25.74
2024January				389	23.34
2024January				429	25.74
2024January				400	24.00

Here you can do this one of 2 ways also.

1. You can enter the receipt amount here on each vehicle and have the system calculate the taxes here, or
2. You can use the "**Download Upload Template**" to enter the receipt amounts.

If you prefer to do the "**Download Upload Template**", you click on the option and then open the excel sheet (**PLEASE NOTE: The Export option <u>does not work</u> for the "Bulk Upload". It is just for you to export what is on the screen**)



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This document will open to the second tab. Do not do anything to this tab. Just click on Sheet 1.

You only need to enter the receipt amount. The document is protected and will not let you modify it. You can always do Ctrl+F and enter the VIN number to locate it faster. Instead of the whole VIN number you may also try using the last set of numbers from the VIN to save you time.

Once you have all of this information entered, save the document and then click on the "**Bulk Upload**" option in the tab and chose your document. The system will then calculate the taxes you owe. You will receive an email letting you know if it was successful or not. If it was not successful, it will tell you what lines it didn't like and why.

(**NOTE:** You do not need to have extra lines with information in it. The system will think you are missing information and will reject it. Only have information in the lines that you need.)

SEAT FEES

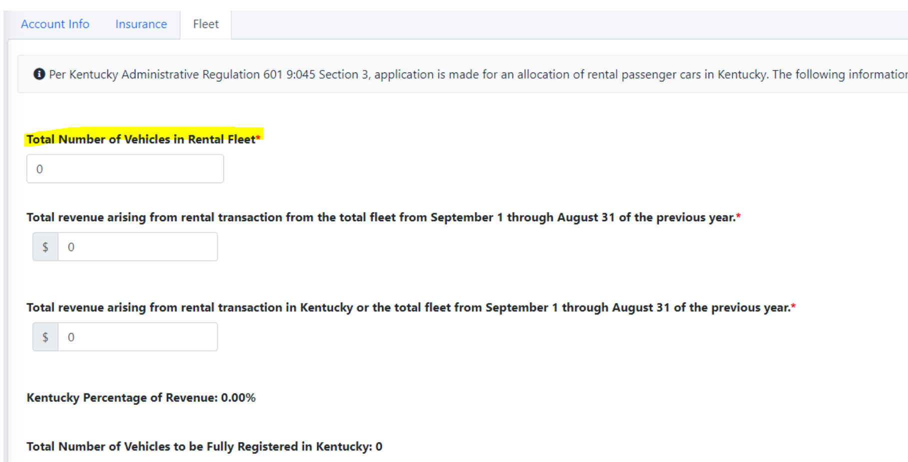
These fees are the first-time registration/renewal fees that used to be charged monthly to each permit holder. With the new system, these are being charged on the calendar year now, and will only occur in January.

If a permit holder adds vehicles to their account during the year. The seat fees will be added to that month's bill at a pro-rated rate, and then rolled into the overall total the next year. You need to keep the record of what vehicles you added in the month. We do not have that information of when you added what vehicle in what month.

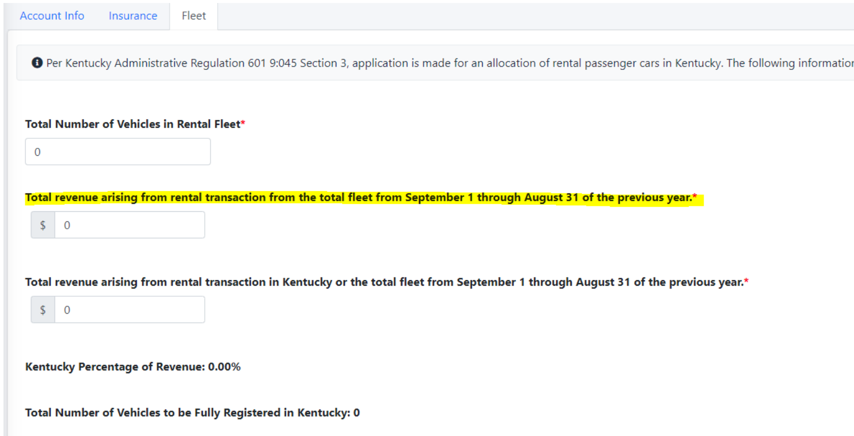
The Seat Fee charge is $15 per year. And then it is reduced at the $1.25 rate for each month after January.

FLEET RETURNS

You will enter your information slightly different. On your Fleet tab you will need to enter the total number of vehicles in your fleet.



Then you will need to enter the total revenue you generated from all vehicles from Sept. 1 – August 31 of the previous year (so this would be from 2022-2023).


Account Info | Insurance | Fleet

Per Kentucky Administrative Regulation 601 9:045 Section 3, application is made for an allocation of rental passenger cars in Kentucky. The following information

Total Number of Vehicles in Rental Fleet*

0

Total revenue arising from rental transaction from the total fleet from September 1 through August 31 of the previous year.*

$ 0

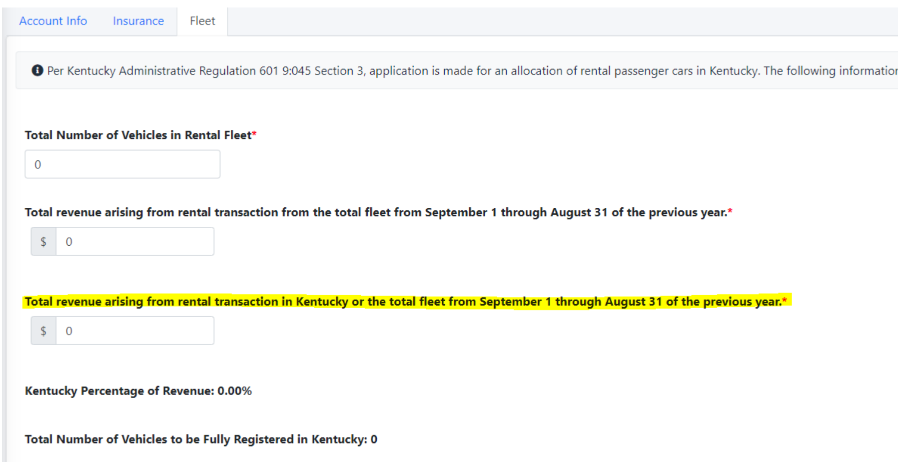
Total revenue arising from rental transaction in Kentucky or the total fleet from September 1 through August 31 of the previous year.*

$ 0

Kentucky Percentage of Revenue: 0.00%

Total Number of Vehicles to be Fully Registered in Kentucky: 0

Then it will ask you again how to break it down to just the Kentucky Revenue for that time period.


Account Info | Insurance | Fleet

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Total Number of Vehicles in Rental Fleet*

0

Total revenue arising from rental transaction from the total fleet from September 1 through August 31 of the previous year.*

$ 0

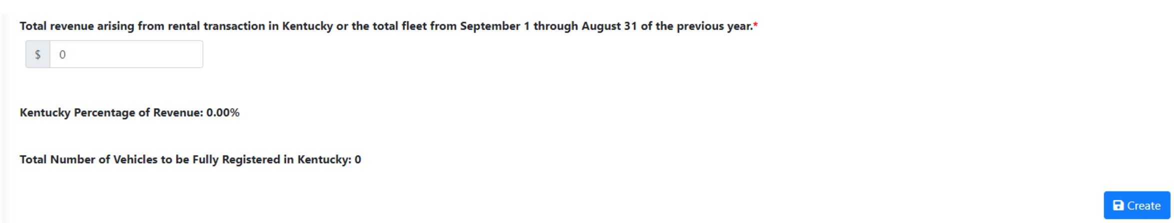
Total revenue arising from rental transaction in Kentucky or the total fleet from September 1 through August 31 of the previous year.*

$ 0

Kentucky Percentage of Revenue: 0.00%

Total Number of Vehicles to be Fully Registered in Kentucky: 0

The system will then break down what percentage is actually owed on the bill. You will then hit the create button on the bottom right


Total revenue arising from rental transaction in Kentucky or the total fleet from September 1 through August 31 of the previous year.*

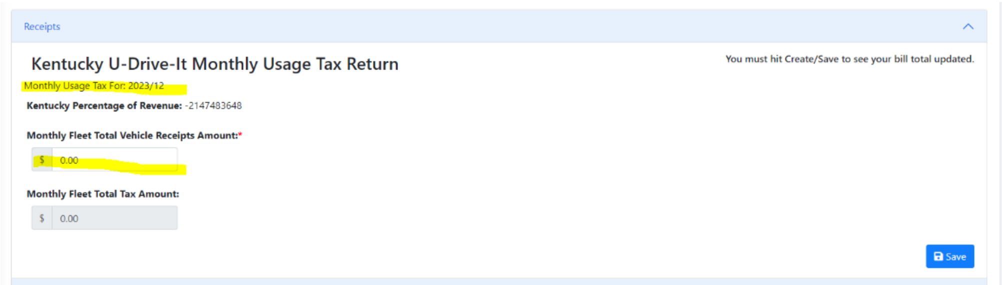
$ 0

Kentucky Percentage of Revenue: 0.00%

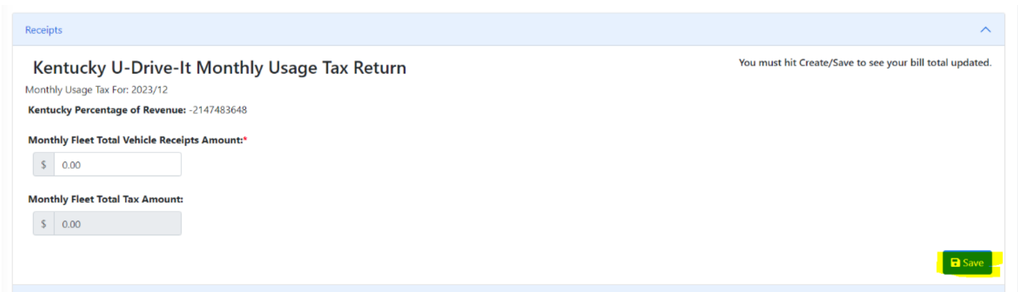
Total Number of Vehicles to be Fully Registered in Kentucky: 0

Create

You will just enter the total receipts you all did for December in Kentucky into the first amount, and the system will calculate the taxes owed for you.

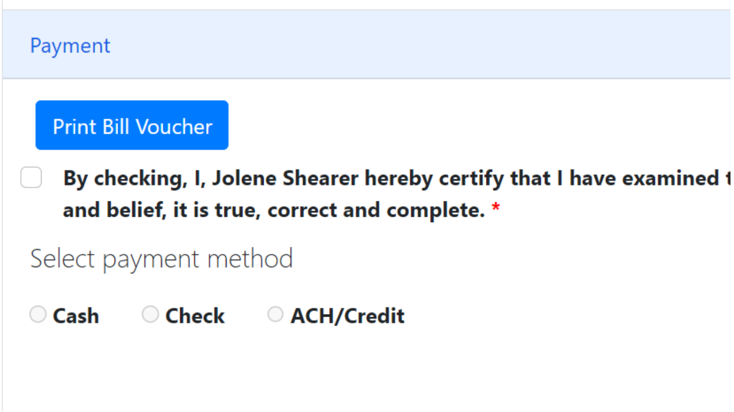


Then hit Save, and this will generate your bill.



PAYING MONTHLY RETURN

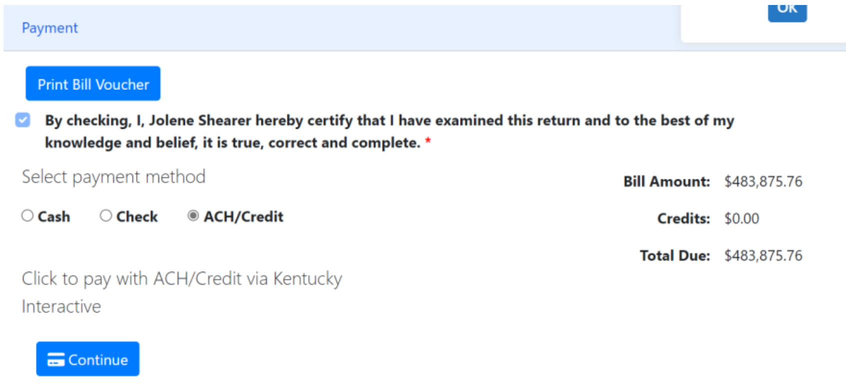
Once you have entered all of your receipts and the total is correct, scroll down to the bottom, and select the way you want to pay. You have to select the option "By checking, I,…" in order to make the payments.



CASH IS NOT AN OPTION

If you are going to mail in a check, please print off the bill voucher to mail in with your payment.

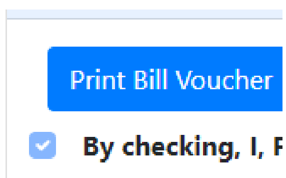
If you would like to pay online with an ACH Check or Credit Card, then click on the ACH/Credit option and then click on "**Continue**"



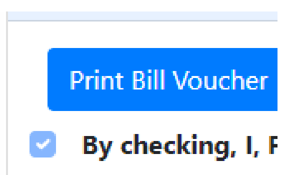
Follow the prompts on that screen to make your payment. Note there is a $3 fee for the ACH Check payment and a 4% service fee for Credit Card payments.

ZERO RETURN

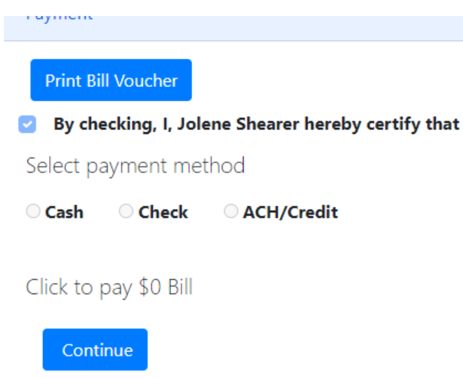
You can file a zero return, even if you have vehicles on the account. If you have vehicles on there, then just enter zero for each one. Then you will check the box that the information is correct and complete.



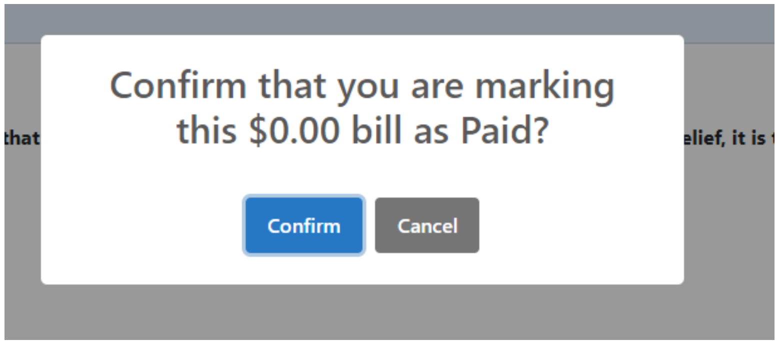
If you have no vehicles and filing a zero return, then you will just click on the box.



It should then open the “Click to Pay $0 Bill”. You will click on the continue button.



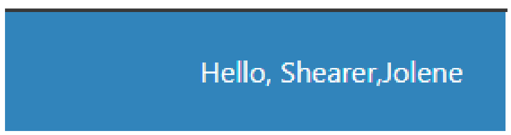
Then you will confirm that you are paying a zero bill.



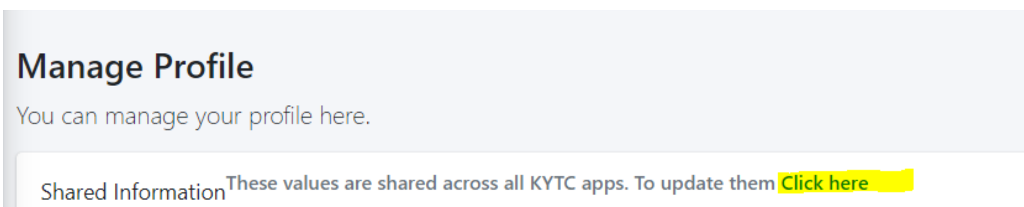
Sign-Out/Password Change:

The system does not have a sign-out option. It will keep you logged in. If you need to change your password, you can do that.

First click on your name in the top right corner.



Then under Manage Profile, you will click on Click Here



Here you will find all your profile information. You will click on Password to change your password.