

***The Kansas State Treasurer's On-line Reporting System  
A Guide to Using UP3***

[\*What is the purpose of UP3?\*](#)

[\*I signed up to become a user but do not plan on using UP3 for several months. Is there anything I should do now?\*](#)

[\*A grey box appears when I try to access UP3 and it is asking for User Name and Password. My personal account information is not accepted. What should I enter in the User Name and Password field?\*](#)

[\*I forgot my Personal Operator ID to UP3. Should I request another account?\*](#)

[\*I forgot my Personal Password to UP3. Can I call your office to get my password?\*](#)

[\*I will not be able to enter all of the properties during one session. Can I come back to my report at a later date/time?\*](#)

[\*I am using the "Back" button and it says that the page cannot be displayed. How do I navigate through the system?\*](#)

[\*Why is UP3 requiring me to log in again?\*](#)

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[\*How do I reclaim a property through UP3?\*](#)

[\*I do not foresee using UP3 until the next report season. Will I need to sign up for access again next year?\*](#)

[\*I have questions not covered in the FAQ page. How do I contact the Kansas State Treasurer's office?\*](#)

[\*What is the purpose of UP3?\*](#)

To provide businesses that report unclaimed property to Kansas a secure site that allows entry of owner information for funds they are escheating into a temporary holding stage in Kansas' database. Our database can be used to add properties or edit entered properties at any time until it is selected to be released to our office. Once the report is released by the on-line holder, a cover sheet is generated by UP3 and it is removed from the temporary holding stage of

our system. A check made payable to the Kansas State Treasurer's office is then submitted with the cover sheet. When the check is received, our office deposits the funds and releases the report onto our database where it is available to the public for claim.

***I signed up to become a user but do not plan on using UP3 for several months. Is there anything I should do now?***

When you sign up to become a user of UP3 our office will review your request and send you an e-mail with the subject "UP3 Site User Welcome". This e-mail contains information on how to access your account. All accounts must be validated before the user can access UP3. Our office suggests validating your account when you sign up for access. You will be required to enter the password you selected during the account request process and many users forget the password they selected or are unable to locate the welcome e-mail after several months have lapsed.

***A grey box appears when I try to access UP3 and it is asking for User Name and Password. My personal account information is not accepted. What should I enter in the User Name and Password field?***

The grey box titled "Connect to online.treasurer.state.ks.us" that appears requires a User Name and Password. This is a User Name and Password that all authorized users must enter to increase the security of our site (this information is the same for all users). When you sign up for an account our staff sends an e-mail with the subject "UP3 Site User Welcome." Print the e-mail for your records. The e-mail contains steps to validate your account. During the validation steps a page appears that states "Please Read Carefully or Print this Page." The User Name and Password information are available from this page and is only available to view during your validation process. If you did not print the page or make note of the User Name and Password please reset your password from our homepage and start the validation process over. You can find the link "Reset my Password to UP3" from [www.kansascash.com/holders](http://www.kansascash.com/holders). A password will be displayed on your screen that you must write down exactly as it appears. An email will be sent to the address we have on file and you must follow a link in the email to finish the password process. Once completed, you may log into UP3 using the password supplied to you and then change your password to something easy for you to remember from the "Change your Profile" section on the bottom right-hand side.

You will be required to enter the User Name and Password (to access our secure site) as well as your Personal Operator ID and Personal Password (to access your personal account) each time you visit UP3.

***I forgot my Personal Operator ID to UP3. Should I request another account?***

When you initially sign up to be a UP3 user, your Personal Operator ID is defaulted to the e-mail address associated with the account. If you altered your Personal Operator ID from the *Change Your User Profile* page and you do not remember it, please contact our office.

***I forgot my Personal Password to UP3. Can I call your office to get my password?***

No, our office does not have access to your personal password. You can find the link "Reset my Password to UP3" from [www.kansascash.com/holders](http://www.kansascash.com/holders).

A password will be displayed on your screen that you must write down exactly as it appears. An email will be sent to the address we have on file and you must follow a link in the email to finish the password process. Once completed, you may log into UP3 using the password supplied to you and then change your password to something easy for you to remember from the "Change your Profile" section on the bottom right-hand side.

***I will not be able to enter all of the properties during one session. Can I come back to my report at a later date/time?***

You may come back to a report at any time. It will be saved and may be viewed & accessed by following the path *Holder Reporting* ⇒ *Holder Report Data Entry* ⇒ *View Current Staged Report List*.

***I am using the “Back” button and it says that the page cannot be displayed. How do I navigate through the system?***

You should limit your use of the back button and instead use the links provided in the system for navigation. In the upper left hand side of your browser you will see a linkable *Path* in which you can select a previous step. To return to the reporting/claims page for full menu options you may select the *Reporting* or *Claims* link at any time at the top or bottom of each page.

***Why is UP3 requiring me to log in again?***

Your session in UP3 will expire if it sits idle for 1 hour. Remember to use your “Log Off” option at the top of the page or secure your workstation to ensure that no one else has access to your secure pages.

***What is the red asterisk next to some fields in UP3?***

The asterisk indicates a required field. Leaving the field blank will create an error and prevent you from releasing your report. Please contact our office if you are unsure what information the field is requesting.

***I entered the wrong information on the General Report Info page. How do I modify it?***

You may access and modify the general information for your report anytime by following the path *Holder Reporting* ⇒ *Holder Report Data Entry* ⇒ *View Current Staged Report List*. Clicking the *View* link under the report will direct you to a page to perform many changes. You may alter the information you entered on the *General Report Info* page by clicking *Modify Settings for This Report*.

***I entered the wrong information on an owner’s property. How do I modify it?***

You may access and modify property/owner information by following the path *Holder Reporting* ⇒ *Holder Report Data Entry* ⇒ *View Current Staged Report List*, then clicking the *View* link under the report listing. On the resulting page (*Report View Data Entry*) you will see a list of all properties you have entered near the bottom of the page. You are able to *View*, *Modify* or *Delete* properties and owners from the list.

***How do I check my report for errors?***

The system will automatically check your report for errors when you click *Done Entering* below the report on the staged report list. UP3 can check a report for errors at any time by clicking *View* under the report on the staged report list and choosing *Check this report for warnings and errors* from the *Available Options* menu. UP3 will create a list of warnings & errors found. The system will return errors such as the incorrect spelling of a city, a suffix included in the last name field or if a required field is blank. You may click on the link in the error message to jump to the property/owner that created the error. If you would like to see a listing of all properties entered to check spelling of names or the validity of an entry you may view a list of all properties entered by clicking *View* under the report on the staged report list. The resulting page will display entered properties and owners and give you the option to *View*, *Modify* or *Delete* information if errors are found.

***I have a non-fatal/fatal error. What is the difference and what do I do now?***

A *non-fatal error* is information that the UP3 system believes may be entered incorrectly. Please double check the information and make changes if necessary. If the information is correct no further action is required. Your report will be able to be released with non-fatal errors.

A *fatal error* is information that is being rejected by UP3. You must change the information in these fields. For instance, Kansas cities must be spelled correctly. If you enter Bonner Spgs for Bonner Springs, you must go back and correct the spelling before the report can be released.

***I am done entering all of the properties on this report. What do I do next?***

Once you are done entering properties, follow the path *Holder Reporting* ⇒ *Holder Report Data Entry* ⇒ *View Current Staged Report List*. Click on *Done Entering* below the report and UP3 will error check your report. A link will appear on the resulting page to release the report for processing if no errors are found (click [here](#) for help with errors). Once released, you will be prompted to print a remittance sheet to include with your check. If you fail to print the sheet, you may return to your staged report list and click *Remit Sheet* under the report to print a copy.

***I would like to keep a report for my records. Can I print a copy from UP3?***

You may print the report by following the path *Holder Reporting* ⇒ *Holder Report Data Entry* ⇒ *View Current Staged Report List*. There is a *Print Report* option under each report listed. Adobe Acrobat Reader Software is required. If you do not have Adobe, you may visit our *Just For Holders Page* at <http://kansascash.com/holders> to download your free copy.

***How do I reclaim a property through UP3?***

You may search for properties previously reported by your company in UP3 by following the path *Holder Reporting* ⇒ *Search the Property Database* and entering search criteria. You may view property details from the resulting list. Under available options on the property details page, you can click *Reclaim This Property as the Remitting Holder* if you have previously paid the owner.

***I do not foresee using UP3 until the next report season. Will I need to sign up for access again next year?***

Your login information will remain the same. Please document the system User Name and Password and your Personal Operator ID and Password where you may access it at a later date.

***I have questions not covered in the FAQ page. How do I contact the Kansas State Treasurer's office?***

For holder questions & UP3 support contact our Holder Department

Lisa Bervert

☎ (785) 291-3173

✉ [lisa@treasurer.state.ks.us](mailto:lisa@treasurer.state.ks.us)

For Claiming Unclaimed Property in your business/personal name contact our Claims Department

Claims Department

☎ (800) 432-0386 or (785) 296-4165

✉ [unclaimed@treasurer.state.ks.us](mailto:unclaimed@treasurer.state.ks.us)