Fleet Management

Agency Fleet Coordinator Training

- Part 1 – Introduction, Code, Rule, Policies, and Responsibilities
- Part 2 – Holman/Current Fleet Management
- Part 3 – Additional Services
- Part 4 - wvOASIS

https://fleet.wv.gov

Fleet Management

Agency Fleet Coordinator Training

Part 1 – Introduction, Code, Rule,
　　　　Policies, and Responsibilities

- Introduction
- WV Code §5A12
- Rule148-3
- Rule 148-23
- Governor's Policy
- AFC's Responsibilities

Fleet Management Division Assigned Accounts

- Accounts are assigned by cabinet to give agencies a central point of contact for FMD. This is done to make each interaction an efficient and positive experience

- Each account representative has over roughly 2,500 vehicles

- The account representatives will be whom AFCs contact for fueling, maintenance, Holman, and any other vehicle related questions

- Account representatives also oversee setting up Holman access and maintenance approval levels for their prospective agencies

- To request Holman access and set up maintenance approval levels, an AFC needs to fill out a **DOA-FM-033 Holman User Access Request** form and submit it to their account representative

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Fleet Management Division Assigned Accounts

FMD Provides

- **Fueling Services**
- **Maintenance Services**
- **Vehicle Acquisitions and Financing through Statewide Contracts**
- **Telematics**
- **Driver Safety Program**
- **Carpool Reservation System and Kiosk**
- **Mandated Reporting Requirements**

Fleet Management Division Assigned Accounts

- **James Parsons**
  - Cabinet Levels Include: Administration, Commerce, DHHR, Environmental, Higher Education, Revenue, Senior Services, Arts, Culture and History
  - Email: **James.A.Parsons@wv.gov**
  - Phone: (304) 558-0086
- **Teresa Taylor**
  - Cabinet Levels Include: Elected Officials, Homeland Security, Veteran's, Miscellaneous, Quasi, Judicial, Legislative, Education, Community College
  - Email: **Teresa.D.Taylor@wv.gov**
  - Phone: (304) 957-8253
- **Stephanie Lane**
  - Cabinet Levels Include: Transportation
  - Email: **Stephanie.E.Lane@wv.gov**
  - Phone: (304) 558-2614

https://fleet.wv.gov
Toll Free: 1-855-817-1910

Legislative Policies Concerning State Owned and Operated Vehicles

- **WV Code §5A-12**

- **Administrative Rule Title 148 Series 3 State-Owned Vehicles**

- **Governor's Office Administrative Policy, Employee Use of Employer Provided Motor Vehicles**

- **Complete Versions Can Be Found On Fleet Management Division's Website**

https://www.fleet.wv.gov

WV Code § 5A-12

- Annual report
- Auditor's Office 20% compliance
- Mandates agencies use FMD's services for maintenance and fueling requiring spending units to send FMD a list of bona fide noncompensatory business reasons for which a state vehicle is being provided to each employee on or before July 1st of each year
  - bona fide noncompensatory business reasons means that a vehicle is assigned to the employee, and that employee commutes to and from home and the work location in that vehicle for business purposes
  - Reporting form **DOA-FM-HB-103** found on FMD webpage

https://fleet.wv.gov/AFC_Resources/Pages/default.aspx

Legislative Rule 148CSR03

- Administration Rule Title 148 Series 3 State-Owned Vehicles
- Passed during the 2018 Legislative Session, effective date 4/3/2019
    - Expands on WV Code §5A-12
    - Provides dates and identifies the data and information that needs to be maintained and reported

AFC Reporting Checklist can be accessed at this link:

§148-3-3. Agency Fleet Coordinators.

3.1. Each spending unit which utilizes state-owned vehicles shall designate an agency fleet coordinator as point of contact between the agency and the Fleet Management Division. The agency fleet coordinator will be charged with tracking the agency's state-owned vehicles, reporting required information to the Fleet Management Division, and communicating with the Fleet Management Division regarding management of the vehicles assigned to the agency. On or before July 1, 2018, each spending unit shall designate an agency fleet coordinator on the form prescribed by the Fleet Management Division and notify the Fleet Management Division within 30 days of any change in designated agency fleet coordinator.

3.2. Agency fleet coordinators are responsible for ensuring employees assigned a state-owned vehicle by the spending unit are familiar with all rules, policies and programs related to state-owned vehicle use. Agency fleet coordinators are required to review and document driver understanding of these rules, policies and programs no later than January 15th, each calendar year on the form designated by the Fleet Management Division.

Rule §148-3-3 is an expansion of HB4015 §5A-12-8 sections a, b, c, and d

Spending Units Shall Name a Fleet Coordinator and Submit to FMD

AFC and Driver Based Forms

- Fleet Policies and Procedures Driver Acknowledgement (DOA-FM-011)
- Fuel Card User Agreement (DOA-FM-031)
- Fleet Vehicle Inspection Checklist (DOA-FM-018)
- Defensive Driving Training and DMV Driver's License Record (DOA-FM-023)
- State of WV Vehicle Log Sheet (DOA-FM-067)
- Driver List for non-compensatory business reasons (DOA-FM-HB-103)
- AFC Schedule of Reporting Checklist 1-20-2021
- Emp. Acknowledgement Form
- DOA-FM-006 Agency Fleet Coordinator Contact Profile
- DOA-FM-007 Vehicle Lease & Administrative Agreement
- DOA-FM-013 Agency Fleet Utilization Exemption
- DOA-FM-021 Vehicle Purpose Update
- DOA-FM-033 ARI User Access Request Form
- DOA-FM-059 Vehicle Request

https://fleet.wv.gov

AFC Responsibilities

AFCs are responsible for:

- Making sure that all driver and overnight parking address information for each vehicle is entered into Holman
- AFCs are responsible for making sure that a maintenance approval hierarchy is in place for all vehicles
- Making sure invoices from Holman maintenance, fuel, lease payments, and others are routed to appropriate accounts payable representative in your agency
- Collecting and filing vehicle logs

   Providing monthly odometer reading for those vehicles that do not use FMDs fueling services or have not utilized the service in the past 60 days

   All commuting miles MUST be reported monthly to FMD

- Assigning fueling PIN numbers

   Drivers Acknowledgement Form

- Completing, approving, and routing of vehicle requests for new, decommission, and/or reassigning a state vehicle
- Training drivers on all policies, procedures, rules, and code related to operating a state vehicle

AFC Responsibilities

AFCs are responsible for:

- Communication with fixed asset person regarding entry of agency-owned vehicle into OASIS-remember this must be done prior to receiving state plates
- Updating vehicle information with BRIM and Holman
- Forwarding all communication from FMD to the appropriate person within your spending unit
- Ordering vehicles for replacement
- Driver training
   Valid Drivers License
- Accident procedures
- Reporting requirements

State of West Virginia
Fleet Management Division

State-Owned vehicle data required to be reported to FMD Rule 148-3-11

11.1. Each spending unit with state-owned vehicles shall conduct an annual survey of its fleet and reconcile its vehicle records with those of the Fleet Management Division and with the centralized inventory database maintained by the Enterprise Resource Planning Board.

11.2. Agency fleet coordinators shall provide by October 31st each year, or upon request, to the Fleet Management Division data on each state-owned vehicle, including:

11.2.a. vehicle identification number;

11.2.b. manufacturer, make, model and year of the vehicle;

11.2.c. class or type of each vehicle;

11.2.d. license plate number of each vehicle;

11.2.e. date of acquisition of each vehicle;

11.2.f. vehicle inspection records of each vehicle;

11.2.g. annual costs associated with vehicle rental expenses;

State-Owned vehicle data required to be reported to FMD Rule 148-3-11

11.2.h. annual reimbursement by the agency for employees' personal vehicle use which shall include total miles and reimbursement rate;

11.2.i. funding source for each vehicle (department number, unit number and fund number);

11.2.j. odometer readings for each vehicle;

11.2.k. fuel usage of each vehicle;

11.2.l. all maintenance events associated with each vehicle; and

11.2.m. annual total indirect costs of operating state-owned vehicles for the agency.

11.3. The Fleet Management Division will provide to the Governor and Joint Committee on Government and Finance an annual report of state vehicle usage, including operating costs and the number of vehicles.

By using FMD's fueling and maintenance services, reports can be run out of Holman to meet mandatory reporting requirements

Agency Fleet Coordinator Schedule of Reporting Checklist

DATE	REPORTING REQUIRMENTS	INFORMATION FOUND
		REVISED 4/2023
January 15th of each year	Agency fleet coordinators (AFCs) are responsible for ensuring employees who operate a state-owned vehicle by the spending unit are familiar with all rules, policies and programs related to state-owned vehicle use. AFCs are required to document driver understanding of these rules, policies and programs no later than January 15th, review driver understanding of the Governor's Administrative Policy of Employee Use of Employer Provided Motor Vehicles/ Driver Completes the Employee Acknowledgement form DOA-FM-011 form or LMS Certificate. A copy of the Governor's policy must be in each state vehicle	Legislative Rule 148 CSR 148 §3.2 and Governor's Policy for State Employee use of Employer Provided Motor Vehicles. Driver completes the Employee Acknowledgement DOA-FM-011 form either by reviewing the policy on the LMS (CourseMill) system and receiving a completion certificate or by reading the policy and signing the form found on FMD's webpage
March and September	Biannual continuing Driver Safety Module	Email sent to participants
July 1st of each year	All vehicles must be in wvOASIS Fixed Assets. Spending Units shall affirm that all vehicles are in Fixed Assets with Surplus Property	Surplus Property or wvOASIS HelpDesk
July 1st of each year / Review Monthly	Each year, Utilization Exemption Requests must be submitted for those vehicles which are not expected to meet the 1,100 miles/per month requirements for the new fiscal year. Previous fiscal year exemption requests are rendered void	DOA-FM-013 form in the forms database on FMD's webpage and Holman Insights General Info tab
By July 1st of each year / As needed	Spending Unit names a Fleet Coordinator and reviews the maintenance parameters and user access in ARI for any edits needed and submits to FMD	DOA-FM-006 and DOA-FM-033 form in the forms database on FMD's webpage. The DOA-FM-006 form needs to be sent to FMD only following an AFC change
July 1st of each year	New Insurance cards must be in every vehicle	FMD's webpage
July 1st of each year	BRIM Defensive Driver Requirements. ARI has a Driver Safety Program that can facilitate all tracking and reporting requirements. Agencies can sign up for the program by contacting their FMD Account Manager	DOA-FM-023 form on FMD's webpage. In order to receive a premium discount, agencies must have a defensive driving program for their drivers
On or before July 1st each year	Spending unit shall prepare and maintain a list of all employees who are provided a state vehicle and specify the bona fide noncompensatory business reasons for which the state vehicle is being provided to the employee	WV Code §5A-12-7(c). FMD sends the AFCs a spreadsheet and reminder yearly around June 1st
July 31st each year	Spending Unit shall report to Fleet Management Division the number of occasions off-hours/after-hours that a vehicle was used that has an approved Utilization Exemption Request for categories SEV or ERV	Fleet Management Division to supply form/spreadsheet to the Spending Unit.
October 1st each year / As needed upon vehicle change event and/or addition (AFC needs to confirm)	Holman Vehicle Data - DRIVER PIN CLEANUP, REVIEW THAT FUEL CARDS ARE ASSIGNED TO THE CORRECT VEHICLE, VEHICLE PURPOSE FIELD*, OVERNIGHT PARKING ADDRESS, DRIVER'S NAME, and MAINTENANCE PARAMETERS* *Vehicle purpose updates using DOA-FM-021. Maintenance parameter updates using DOA-FM-033 form	Update information in ARI. DOA-FM-021 and DOA-FM-033 forms for Purpose and Parameters (respectively) on FMD's webpage. Holman Insights General Info tab for other attributes. Contact FMD Account Representative for assistance
October 1st each year	AFC should review their Agency's fleet and prepare for new vehicle contract awards. Vehicle replacement criteria is 5 years and 120,00 miles	Holman Insights LOV Report
October 1st each year	AFCs must review their vehicle operating cost in Holman Insights and agencies exempt must send FMD their operating cost for previous fiscal year	Holman Insights database and other information tracked by AFC
Monthly, 5th of each month	Report requested Odometer readings to FMD. A monthly fuel transaction and/or telematics could alleviate reporting odometers	Email request from FMD to Agencies that have a missing odometer reading
Monthly	Ensures drivers report commuting miles on Vehicle Log Sheet and sends copy to FMD	AFC to collect from drivers
Daily / As needed	Ensures new drivers have valid licenses and that they complete the DOA-FM-023 form as well as the Governor's Administrative Policy DOA-FM-011 (certificate or acknowledgement form). DOA-FM-031 Fuel Card User Agreement (ensure drivers understand procdures associated with using a FMD provided fueling card).	AFC to track and have drivers complete DOA-FM-023 (acknowledgement of defensive driver training and valid driver's license), DOA-FM-011 (acknowledgement of expectations regarding the operation of a state vehicle), and DOA-FM-031 (Fuel Card Uaser Agreement) forms. Forms located on FMD's webpage
Daily / As needed	Review Holman Insights Dashboard for Alerts and Widgets	Holman Insights Dashboard
Daily / As needed	Report any changes made within 30 days to a vehicle License/Registration to FMD and include the new registration card copy	DMV and ARI
Daily / As needed	AFCs are to report all vehicle / driver complaint data to FMD	AFC to track

Governor's Office Administrative Policy
Employee Use of Employer Provided Motor Vehicles

- **This policy is to be reviewed by each driver of a state-owned vehicle by January 15 of each year**

- **A copy of this policy must be kept in each employer provided vehicle.**

- **The Governor's Policy and DOA-FM-011 Form can be found here: https://fleet.wv.gov/new-driver-orientation/Pages/default.aspx**

- **Signed DOA-FM-011 forms should be retained internally by the agency**

Bona Fide Noncompensatory Employees Who Are Provided a State Vehicle Source Rule 148-03

DOA-FM-HB-103 FORM TO BE PROVIDED TO FMD ON OR BEFORE JULY 1ST OF EACH YEAR

2.3. "Commuting" means the use of a state vehicle by an employee who has been assigned a state vehicle, whether permanent or temporary, to drive to and from the employee's home and regular place of employment, in accordance with the Internal Revenue Service Publication 15-B, *Employer's Tax Guide to Fringe Benefits*.

2.4. "*De Minimis* personal use" means the use of a state-owned vehicle for personal purposes, of which the value of that personal use is so small that accounting for it would be unreasonable and administratively impractical, including while commuting when permitted, in accordance with the Internal Revenue Service Publication 15-B, *Employer's Tax Guide to Fringe Benefits*.

Legislative Rule §148-3-7

7.10. Each state-owned vehicle shall have a vehicle log sheet associated with the vehicle. Drivers, whether the vehicle is assigned to an individual or is used by multiple drivers, shall record information related to total mileage, miles commuted, destinations and purpose.

VEHICLE LOG

State of WV Vehicle Log Sheet

Reporting Month:		Year:		Department:		Unit:		License Plate #:		Last 6 of VIN:

Vehicle ID #:		Total Monthly Business Miles Driven:		Total Monthly Gallons Purchased:	
Beginning Odometer:		Total Monthly Commuting Miles Driven:		Total Monthly Fuel Purchased:	
Ending Odometer:			Total Monthly Miles Driven:	

Date	Driver's Name	Driver's Title	Gallons Purchased	Total Fuel Purchased	Odometer at Fueling	Start and End Destination / and Purpose of Trip	Business Miles Driven	Commuting Miles Driven	Total Miles Driven
1									
2									
3									

Utilizing telematics eliminates the need for a paper vehicle log

Rule §148-3-7 is an expansion of §5A-12-10b

§148-3-10. Commuting in state-owned vehicles

10.2. Commuting value shall be calculated in accordance with Internal Revenue Service Publication 15-B, *Employer's Tax Guide to Fringe Benefits.*

10.3. If an employee has been assigned a vehicle and the vehicle is used to commute to and from the employee's regular workplace during that temporary assignment, commuting value must be calculated and reported for the days the employee used the state-owned vehicle to commute.

10.3.a. The employee assigned to the vehicle is responsible for accurately collecting information needed to calculate the commuting value and reporting to the appropriate person within the spending unit that manages payroll.

10.4. The spending unit shall report the commuting value as wages and salary to the Internal Revenue Service and the State of West Virginia and shall report the commuting value at least annually to the Fleet Management Division on the prescribed form.

10.5. Failure to submit the prescribed form may result in the termination of the assignment of a vehicle to the employee, will result in a determination by the spending unit business office that miles driven during the unreported period are personal use miles, and may result in applicable penalties levied by the Internal Revenue Service.

The Governor's Office Administration Policy concerning the Employee use of Employer Provided Motor Vehicle provides examples and clarification concerning the proper use of a state vehicle

MINIMUM UTILIZATION

§148-3-9. Minimum Utilization.

9.1. To ensure proper utilization and to justify the size of the state's fleet, state-owned vehicles must meet an annual average minimum monthly mileage of 1,100, less any commuting miles.

9.2. For vehicles with an annual average of less than 1,100 miles per month, if the spending unit wishes to retain the vehicle, the spending unit must request a waiver from the minimum mileage required in Subsection 9.1 of this section. The request shall be submitted to the Fleet Management Division on the prescribed form. A waiver granted by the Fleet Management Division is valid until the end of the fiscal year and must be resubmitted by the spending unit annually.

Current Odometer

183,619 MILES

Monthly Travel Trend

*All calculations based on available ARI data
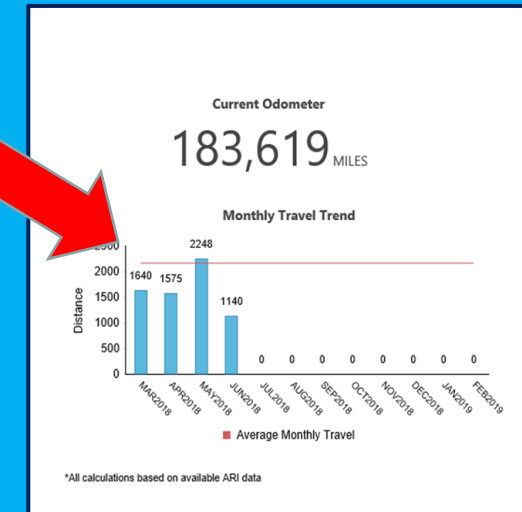
JULY 1 BEGINNING OF FISCAL YEAR UTILIZATION FORMS ARE VOID AND NEW FORMS MUST BE SUBMITTED
REVIEW THIS SECTION OF THE LEGISLATIVE RULE FOR CATEGORIES OF EXEMPTIONS TO BE USED WITH FORM DOA-FM-013

Rule §148-3-9 is an expansion on WV Code §5A-12-8a

Utilization Exemption Requests

9.3. Requests for waiver of the average minimum monthly mileage will be categorized as follows:

9.3.a. PSV - Vehicles assigned to public safety officers.

9.3.b. SEV - Vehicles assigned to employees whose job duties require the constant use or continuous availability of specialized equipment which cannot feasibly or economically be transferred between a pool vehicle or carried in personal vehicles. Such equipment may include medical supplies, monitoring or testing equipment, or equipment necessary to carry out the mission of the spending unit.

9.3.c. ERV - Vehicles assigned to employees who are on call 24-hours a day, or who must respond to emergencies on a regular or continuing basis where the location requiring the emergency response is not the employee's regular workplace.

9.3.d. ETV - Vehicles assigned to employees for essential travel related to the transportation of authorized passengers on a routine basis; or for the essential administrative functions of a spending unit for which the use of a temporary assignment vehicle, daily rental vehicle, long-term lease vehicle, or use of a person vehicle with mileage reimbursement is neither feasible or economical.

9.3.e. ENV - Vehicles that are free of liens and are both economical and necessary for the spending unit to fulfill its necessary functions. No more than 20 percent of the spending unit's vehicles may be granted a waiver under this justification.

This report is due July 31 of each year. Each spending unit must report the number of occasions off-hours/after-hours that a vehicle was utilized for categories SEV or ERV

Fleet Replacement and Lifecycle Management

§148-3-4. Purchase of New or Replacement Vehicles.

4.1. Regardless of means of acquisition, a spending unit may not add or replace vehicles in its fleet without prior notification and approval by the Fleet Management Division. The request shall be made on the form prescribed by the Fleet Management Division. The Fleet Management Division shall respond to the request by the spending unit within five business days of receiving the request.

4.2. The Fleet Management Division will approve the purchase of a new vehicle to replace an existing vehicle:

4.2.a. if the existing vehicle is more than five years old and has more than 120,000 miles,

4.2.b. if the existing vehicle is destroyed and is considered a total loss, or

4.2.c. if the existing vehicle requires repairs or maintenance with costs that cannot be justified based upon the remaining life of the vehicle.

Under Agency Fleet Coordinator Resources on FMD's website are instructions, updated yearly, on how to order and decommission state vehicles

https://fleet.wv.gov/AFC Resources

Mandatory Forms that Must be Submitted to Fleet Management Division

DOA-FM-006 Agency Fleet Coordinator Contact Profile

This form is to be used to designate the Agency Fleet Coordinator for your agency. It is also used when you want to modify the existing Agency Fleet Coordinator

DOA-FM-007 Vehicle Lease and Administrative Agreement

This form is pre-filled by the FMD Fleet Coordinator for any vehicle that has been leased through Fleet Management Division or has requested Holman services. The form is then sent to the AFC who is responsible for ensuring completion of the driver information and signature sections

DOA-FM-013 Agency Fleet Utilization Exemption

This form is to be submitted annually (on or before July 1st of each year) and should denote the specified reason for the vehicle's underutilization

DOA-FM-021 Vehicle Purpose Update

This form should be submitted annually on or before October 1st/as needed to provide the usage types of the vehicles in your fleet

Mandatory Forms for Fleet Management Division

DOA-FM-059 Vehicle Request

This form is to be submitted to FMD anytime a vehicle is being acquired or decommissioned, prior to occurrence. All vehicle acquisitions must first receive approval from the Cabinet Secretary of the agency prior to submission to the Fleet Management Division Director. FMD will forward approved requests to the Governor's Office for final approval of the document (unless the agency in question is exempt from the Governor's Office approval)

DOA-FM-HB-103 Driver List for noncompensatory business reasons

This form should be completed to specify the bona fide noncompensatory business reasons for which a state vehicle is provided to an employee. Should be submitted to FMD on or before July 1st of each year

DOA-FM-067 State of WV Vehicle Log Sheet

Submission is mandatory ONLY if commuting mileage is recorded

All commuting miles should be reported to FMD on a monthly basis. This form provides a template for the information your vehicle log sheet should include. If no commuting miles are driven, this form should not be submitted to FMD and should be retained internally only

Mandatory Forms that Must be Retained at the Agency Level

DOA-FM-011 Fleet Policies and Procedures Driver Acknowledgement

This acknowledgement form refers to the review of the Governor's administrative policy on Employee use of Employer Provided Motor Vehicles. It should be completed by your drivers annually by January 15th of each year. It also should be completed by any new drivers your agency assigns. The form should be retained internally and should not be submitted to FMD

DOA-FM-023 Defensive Driving Training and DMV Driver's License Record

This form should be completed both annually, and as needed, and submitted to BRIM as well as retained internally

DOA-FM-031 Fuel Card User Agreement

This acknowledgement form should be used prior to your drivers utilizing a Holman fuel card. This should be retained internally and should not be submitted to FMD

Mandatory / Adjustable forms for your use

DOA-FM-018 Fleet Vehicle Inspection Checklist

This form provides a helpful template for your driver's vehicle inspection. This form can be modified to better suit your agency's mission for the vehicle. Should be retained internally and should not be submitted to FMD.

DOA-FM-067 State of WV Vehicle Log Sheet

This form provides a template for the information your vehicle log sheet should include. This form can be modified to better suit your agency's mission for the vehicle. Should be retained internally with the exception if commuting miles are driven. **All commuting miles should be reported to FMD on a monthly basis**

Fuel and Maintenance Per 148CSR03

§148-3-12. Vehicle management programs provided by the Fleet Management Office.

12.1. The Fleet Management Division will offer to spending units vehicle management programs including, but not limited to fuel purchasing, repairs and maintenance management, towing, and short-term vehicle rentals. If the Fleet Management Division provides a fuel or maintenance management program, agencies with state-owned vehicles must utilize the program provided. Agencies may request in writing an exemption from the management program with justification for the exemption. The Fleet Management Division will evaluate the request for exemption and recommend approval or denial of the request to the Secretary of the Department of Administration, who will make the final decision on approval or denial of the request for exemption.

Rule §148-3-12 is an expansion on WV Code §5A-12-9a, which states "Each spending unit that owns, uses, or maintains a state vehicle shall utilize the vehicle management services provided by the Fleet Management Division for all state vehicles"

Fuel

63
Vehicles with premium fuel transactions
of Unleaded Plus or Unleaded Super in the last 7 days

18
Non Fuel Transactions
in the last 7 days

6
Tank Capacity Violations
in the last 7 days

3
Suspect Fuel Transactions
within one hour and less than 80 Miles travel in the last 30 days

8
Vehicles with diesel and gas transactions
in the last 7 days

Yearly Fuel Usage
By Product Type

- 37,191
- 36,843
- 89,931
- 131,303
- 285,049
- 6,843,048

Legend:
- Unleaded Reg
- Diesel
- Unleaded Plus
- Gasohol
- Unleaded Super
- Other

Basic Fueling Rules

- **Fueling cards are assigned to the vehicle**
  The fueling how to is on FMDs website   https://fleet.wv.gov/fueling
- **PIN numbers are assigned to a driver; drivers should never share them**
- **Drivers must complete DOA-FM-031 Fuel Card User Agreement**
  This form is retained at the agency
- **Lost cards need to be reported to FMD asap**
  A replacement card will be ordered
- **FMD maintains a few loaner cards to bridge any gaps**
  Loaner cards must be returned when permanent cards are received
  If not returned, the loaner card will be terminated by FMD

Maintenance Approval Process

- Agencies must approve all maintenance events on their vehicles
  They must establish a hierarchy of contacts for maintenance approvals
  There are 6 levels of maintenance approval contacts with the FMD account manager always being the 6th or last level

- The 1st contact listed will be contacted first should Holman need to contact someone about a vehicle going in for maintenance. If Holman cannot reach the 1st contact, they will move down the approval contacts list
  In most cases the maintenance approver is contacted through email

- A dollar threshold can be set for maintenance approvals
  FMD recommends $100 threshold

- The Driver of the vehicle cannot be the maintenance approver for that vehicle

Maintenance Approval Process

Below is an example of an FMD vehicle with the maintenance approval hierarchy set up with a $500 threshold

Maintenance Parameters

2011 DODGE GRAND CARAVAN (VIN: 2D4RN4DG8BR788609)

Client : 5R82   Vehicle No : 788609   Client Name : STATE OF WEST VIRGINIA   Group : 1W

Contact Information

Name	Phone	Ext	Email Approval	Email	Cell	Maint	Ins	Rental	Limit
LEIGH JACKSON	3049578230		✓	fleet@wv.gov		P	S		500
JAMES PARSONS	3045580086		✓	fleet@wv.gov		S	S		500
TERESA TAYLOR	3049578253		✓	fleet@wv.gov		S	S		500
STEPHANIE LANE	3045582614		✓	Stephanie.e.lane@wv.gov		S	S		500
BECKY FARMER	3049578207		✓	fleet@wv.gov		S	S		500
KENNY YOAKUM	3045582106		☐			S	S		500
CHENA HILL	3047418656		☐			S	S		500

Fleet.wv.gov

Don't forget that the Fleet Management Division has many helpful resources available on their website

1. Many forms to help with everything involved with ordering and operating a state vehicle **https://fleet.wv.gov/AFC_Resources/Pages/default.aspx**
2. Forms and other resources for drivers of state vehicles **https://fleet.wv.gov/new-driver-orientation/Pages/default.aspx**
3. Instructions on various aspects of a fuel card for a state vehicle **https://fleet.wv.gov/fueling/Pages/default.aspx**
4. Instructions on various aspects of maintenance for a state vehicle **https://fleet.wv.gov/Maintenance/Pages/default.aspx**
5. Updated news and current events at FMD
6. Many informative data reports including FMD's annual report **https://fleet.wv.gov/reports/Pages/default.aspx**
7. And a frequently asked questions page that answers FMD's most asked questions **https://fleet.wv.gov/FAQ/Pages/default.aspx**

Fleet Management

Agency Fleet Coordinator Training

Part 2 – Holman Insights

- Dashboard and Widgets
- Quick Search
- Search Tab
- Reporting Tab
- Maintenance Approval Process and Manual PO Entry
- Asset and Contacts Management Tab
- Combined Inventory Management View with Driver Updates View
- Telematics
- Driver Safety Program

Holman Insights

https://insights.holman.com

Holman Insights Dashboard/Widgets

Dashboard/General Fleet Info

- Three biggest tabs are Inventory, Fuel Usage, and Maintenance
- Telematics is a useful dashboard for any agency using that program
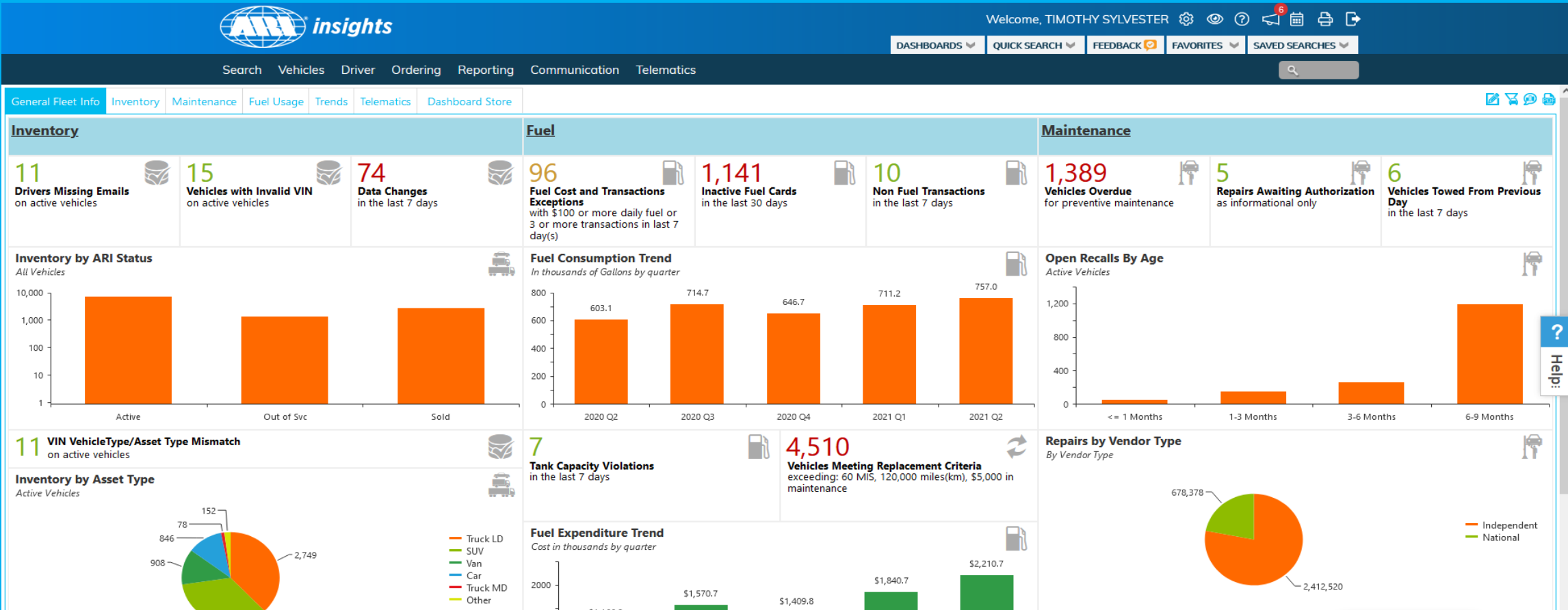
Holman Insights Dashboard/Widgets

Inventory Dashboard
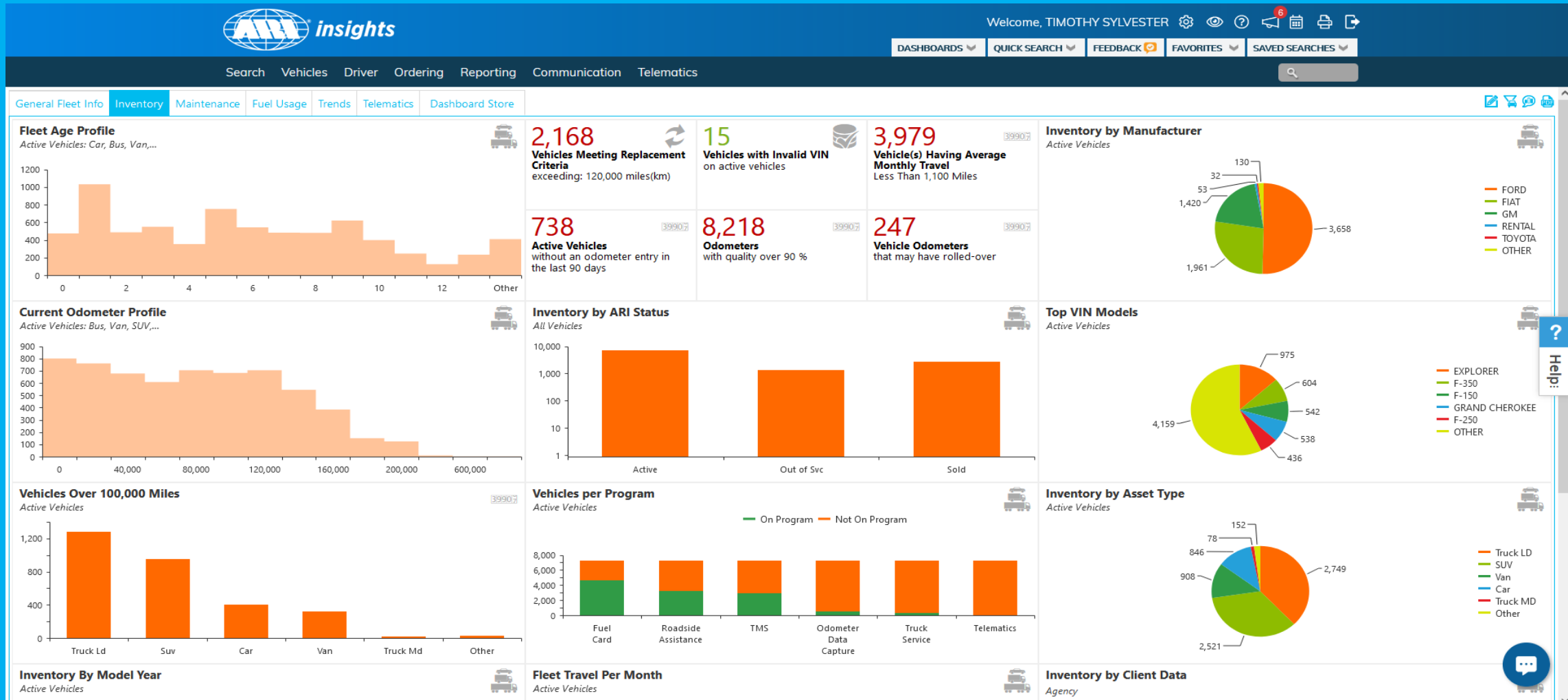
Holman Insights Dashboard/Widgets

Fuel Usage
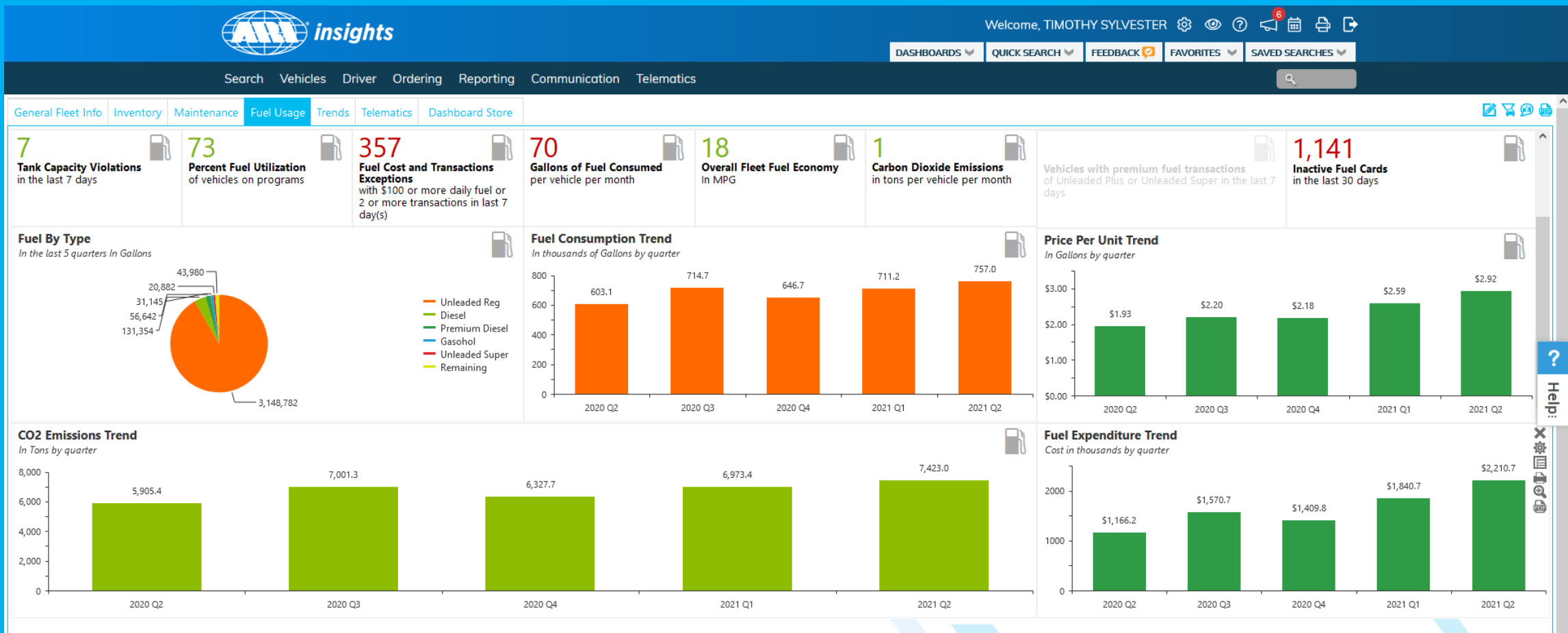
Holman Insights Dashboard/Widgets

Maintenance
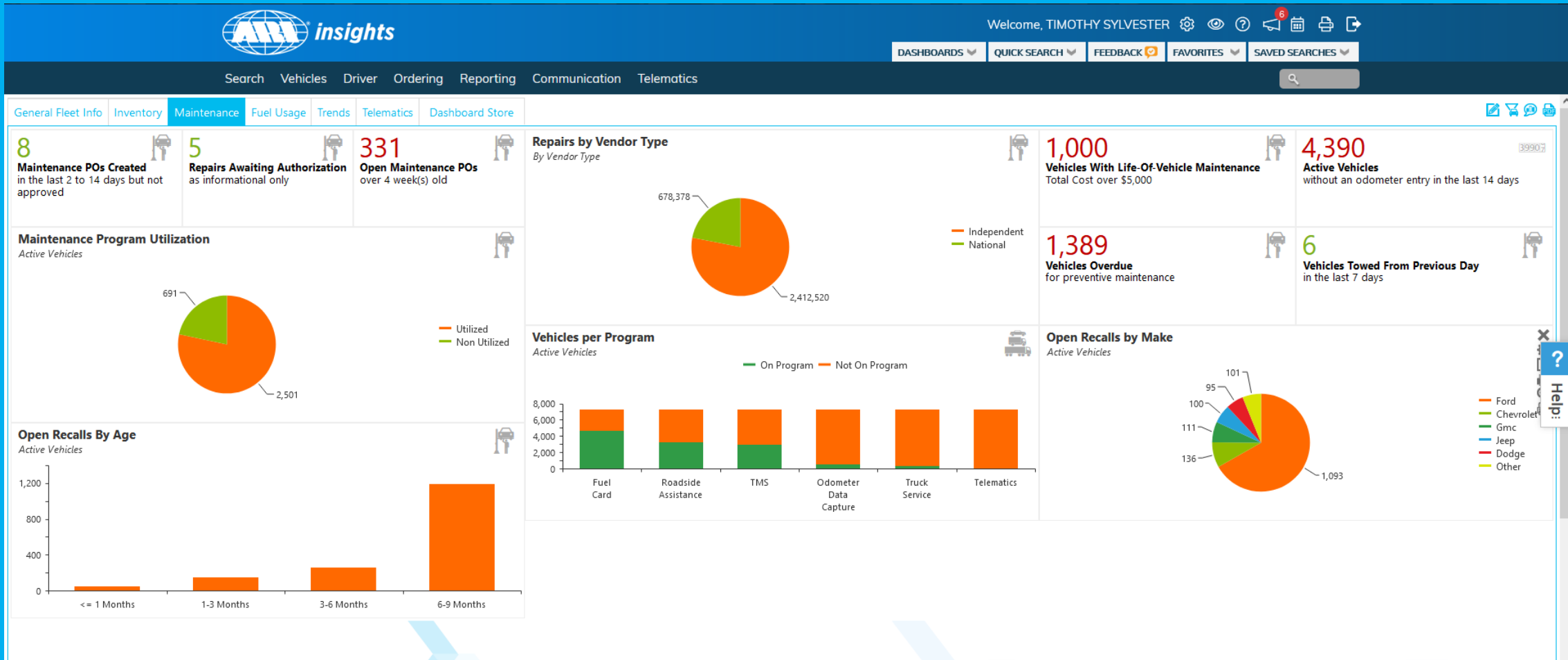
Holman Insights Dashboard/Widgets

Telematics
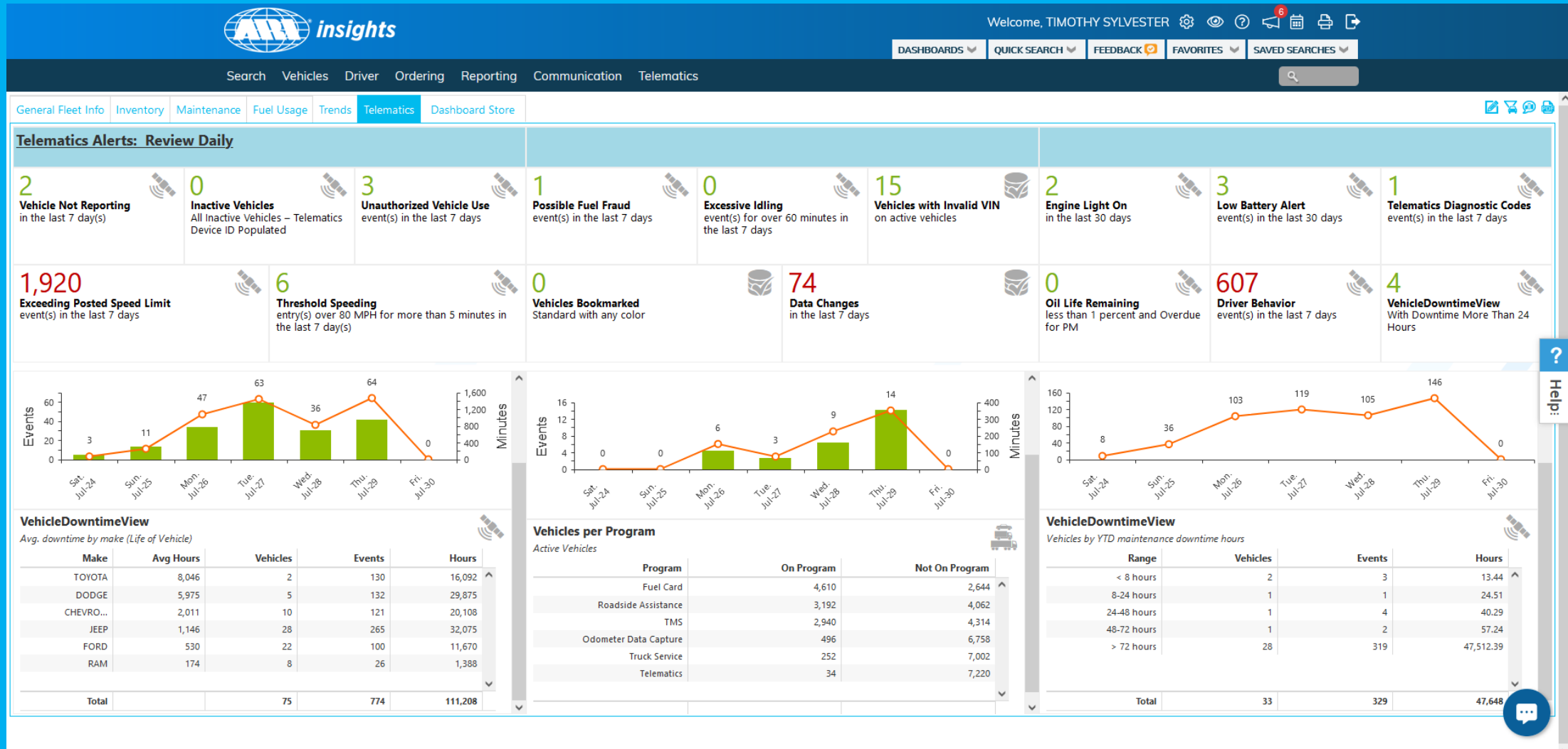
Holman Insights Dashboard/Widgets

Other facts about the dashboard

- The data displayed should only be for the vehicles for your agency
- In Holman, the Division is equivalent to the OASIS Cabinet and the Prefix is equivalent to the Bill Code
- Widgets can be moved around
- Clicking on certain data within widgets will give you a detailed vehicle listing

State of West Virginia

Fleet Management Division

Getting specific vehicle data from a widget

- Click on a number or a piece of a graph to get an Excel style list of the vehicles that make up that widget
- The example below is of 7 vehicles that went over their tank capacity in the last week

General Fleet Info | Inventory | M

7

Tank Capacity Violations
in the last 7 days

Fuel By Type

Tank Capacity Violations in the last 7 days

Total Rows 7 | Rows Per Page 20 ∨ | « ‹ Page 1 of 1 › » | Go to Page [ ] →|

	Client	Vehicle	Division	Bill Code	Exceeded %	Units Exceeded	Fuel Capacity	Transaction Date	Product Name	Units	Unit Cost	Amount	Brand Name	Site Add	Site City	Site State
Details	5R82	261109	HE	UV99	15.80	5.69	36.00	07/26/2021 12:25 PM	Diesel	41.69	$3.60	$150.02	SHEETZ	570 PITTSBURGH RD	UNIONTOWN	PA
Details	5R82	A37440	QU	PS08	21.10	4.00	19.00	07/27/2021 9:55 AM	Unleaded	23.00	$3.06	$70.36	EXXONMOB	11079 BIG POOL RD	BIG POOL	MD
Details	5R82	A83717	HS	PS10	21.90	3.51	16.00	07/27/2021 7:30 PM	Unleaded	19.51	$3.04	$59.29	SHEETZ	136 E MAIN ST	ROMNEY	WV
Details	5R82	A83725	HS	PS10	28.80	4.61	16.00	07/22/2021 12:10 PM	Unleaded	20.61	$3.06	$63.05	EXXONMOB	15 WOODWARD DR	SUTTON	WV
Details	5R82	B08976	HS	PS08	171.20	59.92	35.00	07/22/2021 8:54 AM	Diesel	94.92	$3.30	$313.15	SHEETZ	4401 MACCORKLE AVE S	SOUTH CHARLESTON	WV
Details	5R82	C26933	HS	PS08	22.20	4.00	18.00	07/23/2021 8:16 PM	Unleaded	22.00	$3.07	$67.52	EXXONMOB	500 VANKIRK DR	BECKLEY	WV
Details	5R82	C87945	HS	PS08	21.10	4.00	19.00	07/23/2021 5:18 PM	Unleaded	23.00	$3.06	$70.37	GO MART	6088 WEBSTER RD	SUMMERSVILLE	WV

Holman Insights Quick Search

The Quick Search tab is located at the top of the Holman Insights page

- You can search by a Vehicle number (last 6 of VIN), Plate Number, VIN number and First or Last name of the AFC

- A quick search will show the "General Info" page of an individual vehicle
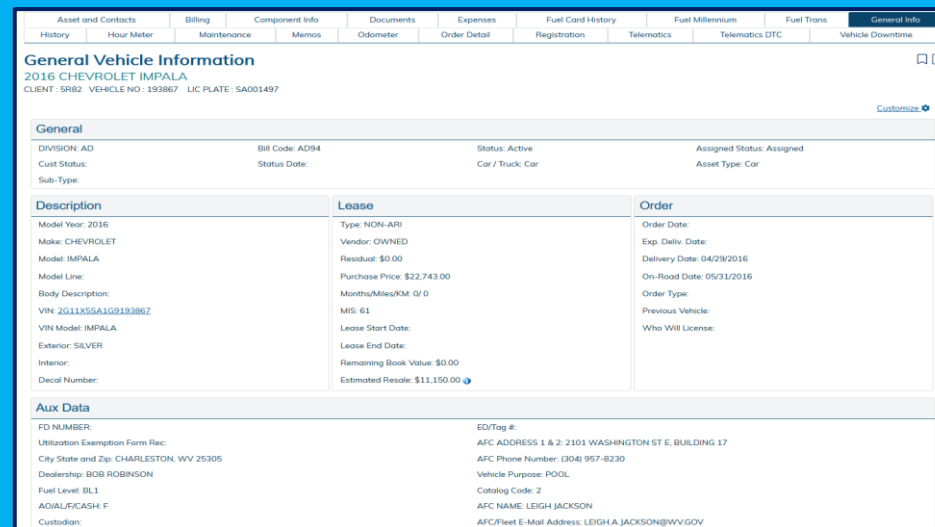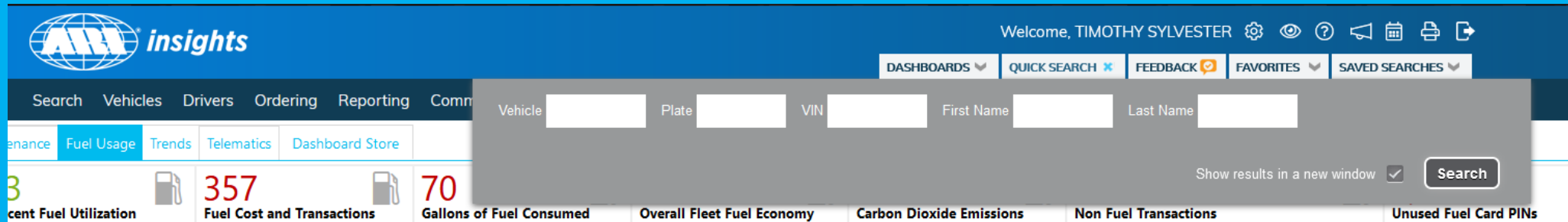
Holman Insights Single Vehicle

There are 6 tabs that are useful to maintaining a vehicle:
1. General Info
2. Expenses
3. Odometer
4. Maintenance
5. Fuel Trans
6. NEW – Asset and Contacts Management tab

| Asset and Contacts | Billing | Component Info | Documents | Expenses | Fuel Card History | Fuel Millennium | Fuel Trans | General Info |
| History | Hour Meter | Maintenance | Memos | Odometer | Order Detail | Registration | Telematics | Telematics DTC | Vehicle Downtime |

General Vehicle Information

2016 CHEVROLET IMPALA
CLIENT : 5R82   VEHICLE NO : 193867   LIC PLATE : SA001497

Holman Insights Single Vehicle

Expenses Tab
- Shows a vehicle's fixed and operating expenses, as well as how much that vehicle is costing an agency on a cents per month, cents per mile basis

Vehicle Expenses ⓘ
2016 CHEVROLET IMPALA

Client :	5R82	DIVISION:	AD	Bill Code:	AD94	Lease Type:	NON-ARI
Vehicle No :	193867	Projected Odometer: as of		Lic Plate : SA001497		Lease Term:	
Months in Service: 61		Lease Miles/KM:		Out Of Svc Date:		Odometer:	76,956 as of 07/29/2021
Net Sale Price:	$0.00 as of	Cap Cost:	$22,743.00	Remaining Book Value: $0.00		Basic Rent:	$0.00

	Agency:	FMD	Employee ID:	E038816	PO#:	FLT16*64	FA#:	A0373265
	Commuter Miles:		DEPT:	0216	UNIT:	0216	ARI Services:	
	Fuel Card:							

FD NUMBER:
Utilization Exemption Form Rec: ED/Tag #:
City State and Zip: CHARLESTON, WV 25305 AFC ADDRESS 1 & 2: 2101 WASHINGTON ST E, BUILDING 17
Dealership: BOB ROBINSON AFC Phone Number: (304) 957-8230
Fuel Level: BL1 Vehicle Purpose: POOL
AO/AL/F/CASH: F Catalog Code: 2
Custodian: AFC NAME: LEIGH JACKSON
Last commuter update: AFC/Fleet E-Mail Address: LEIGH.A.JACKSON@WV.GOV

Operating Expenses

Category	Life of Vehicle	Cost per Month	Cents per Mile/KM	Cost per Hours
[+] Accident Repairs	$286.84	$4.70	$0.00	$0.183
[+] Fuel	$6,528.70	$107.03	$0.08	$4.156
[+] Maintenance Repairs	$358.05	$5.87	$0.00	$0.228
[+] Oil And Lube	$813.62	$13.34	$0.01	$0.518
[+] Tires	$973.25	$15.95	$0.01	$0.620
[+] Wash And Polish	$294.07	$4.82	$0.00	$0.187
Total Operating Expenses	$9,254.53	$151.71	$0.12	$5.891

Fixed Expenses

Category	Life of Vehicle	Cost per Month	Cents per Mile/KM	Cost per Hours
[+] Fixed Costs	$179.38	$2.94	$0.00	$0.114
[+] Management Fees	$628.00	$10.30	$0.01	$0.400
[+] Misc	$984.56	$16.14	$0.01	$0.627
[+] Taxes	$1.05	$0.02	$0.00	$0.001
Total Fixed Expenses	$1,792.99	$29.39	$0.02	$1.141

| Grand Total Expense | $11,047.52 | $181.11 | $0.14 | $7.032 |

* This information is based on data collected through use of ARI programs. Only vehicles on programs from in-service date to sale date will show true life cycle costs. ARI recommends analyzing vehicles that have been sold for more than 60 days.

Odometer Tab
- Shows odometer information for a vehicle
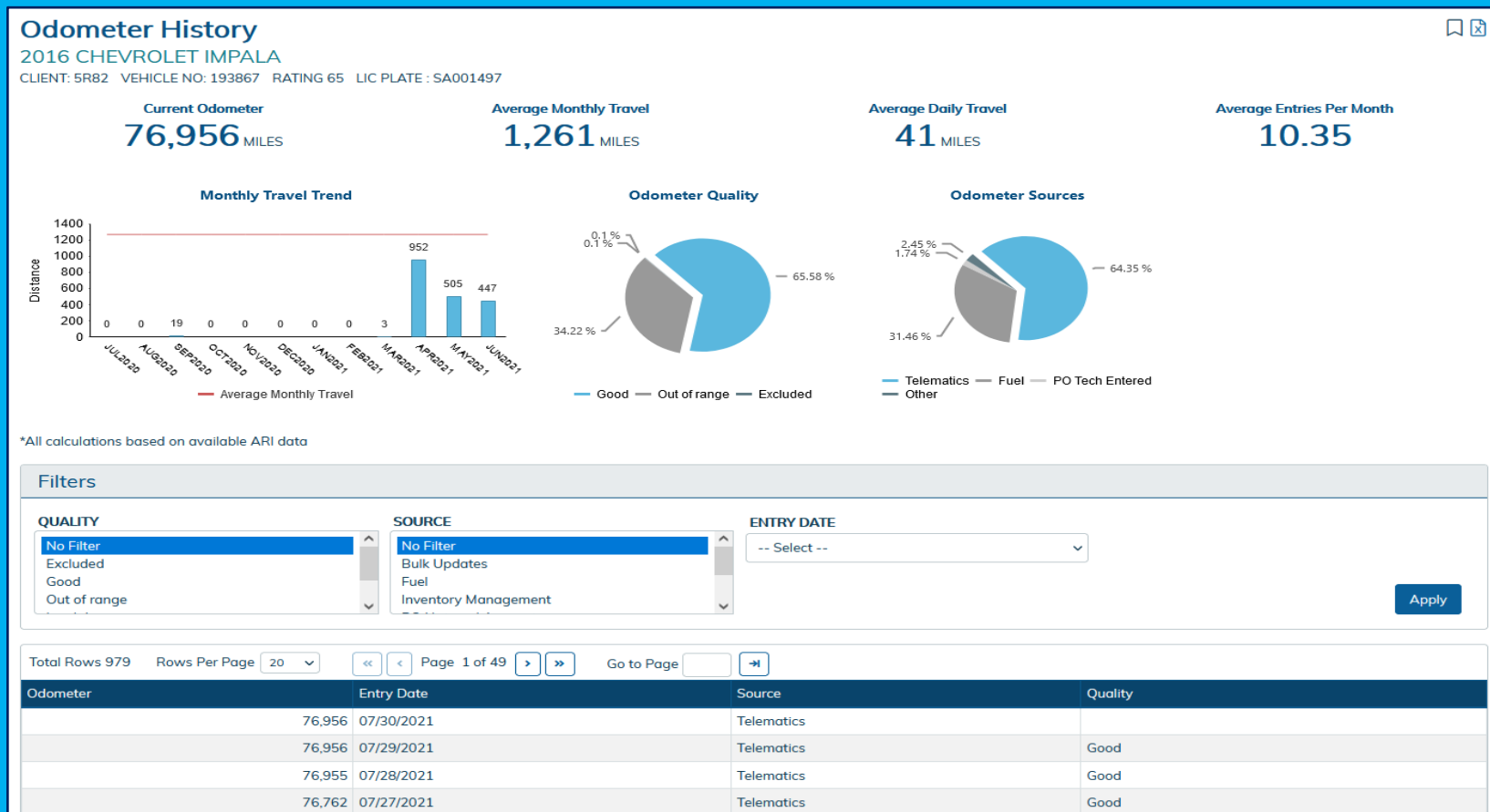
Holman Insights Single Vehicle

Maintenance Tab

- Shows the service history of a vehicle, the maintenance levels of approvals for a vehicle, and the PM schedule set up for that vehicle

Holman Insights Single Vehicle

Asset and Contacts Management Tab

- This is the tab that FMD has opened to Holman users so they can input their driver's information on a per vehicle basis

- On a one to one ratio, vehicle information an AFC or other Holman user can put in are: driver's first and last name, the vehicle's overnight address, a driver's various phone numbers, and a driver's email address

- On pool vehicles, an AFC or Holman user should put in POOL for the driver's first and last name, the vehicle's overnight address, and the supervisor of that vehicle's phone numbers and email

- The email address that is in this section will receive recall alerts

- The fields listed above must be filled into the Asset and Contacts Management tab

Holman Insights Single Vehicle

Asset and Contacts Management tab
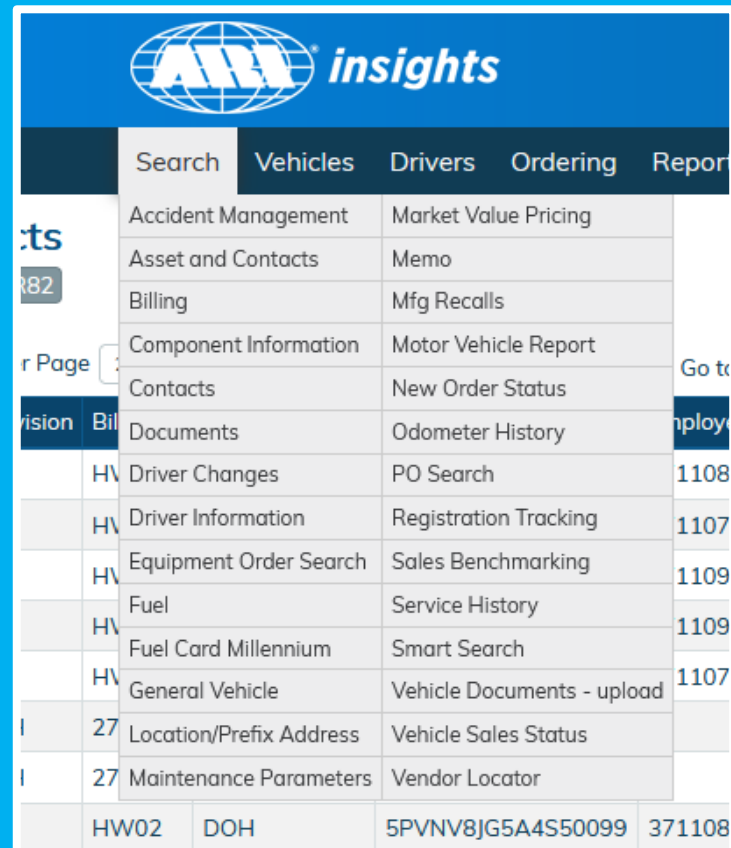
DRIVER

First Name
TIM

Last Name
SYLVESTER

PHONE AND EMAIL

Work Phone
(304) 957-8230

Ext

Home Phone
(000) 000-0000

Cell Phone
(304) 531-6708

Fax
(304) 558-4119

Email
LEIGH.A.JACKSON@WV.GOV

ADDRESS INFO

Address 1
2101 WASHINGTON ST E

Address 2
BUILDING 17

Address 3
KANAWHA

City *
CHARLESTON

State/Province *
WV

ZIP/Postal Code
25305

Holman Insights Search Tab

- The search tab consists of many vehicle related reports
- The two most used reports are **General Vehicle** and **Asset and Contacts**
- These reports can be filtered and customized in multiple ways
- You can save the customized reports to the **Saved Searches** tab

Holman Insights Search Tab

Getting general vehicle data

1. If you click on **Search**, and choose **General Vehicle**, it will bring up a prompt page
2. Here you can enter prompts into the fields already listed, or you can add new prompts from the **Add Fields** drop down box

Holman Insights Search Tab

Getting general vehicle data

- Once you have all prompts entered, click **Search** and your data will come up in a listed format

General Vehicle Listing

SEARCH CRITERIA: Status = Active | Client = 5R82 | Bill Code = AD94

Total Rows 63 | Rows Per Page 20 | « ‹ Page 1 of 4 › » | Go to Page ⇥

	Client ▲	Vehicle	Division	Bill Code	Agency	VIN	Employee ID	First Name	Last Name	State/Province	Make Name	VIN Model	Status	PO#	FA#	Commuter Miles	DEPT	UNIT	ARI Services	Fuel Card	Model Year	FD NUMBER	ED/Tag #	Utiliza
Details	5R82	126284	AD	AD94	FMD	3FA6P0G77HR126284				WV	FORD	FUSION	Active	FLT16*21	A0373886		0216	0216	Y	Y	2017			
Details	5R82	144183	AD	AD94	FMD	3FA6P0G73HR144183				WV	FORD	FUSION	Active	FLT16*21	A0375242		0216	0216	Y	Y	2017			
Details	5R82	150577	AD	AD94	FMD	2GNFLEEK2F6150577				WV	CHEVROLET	EQUINOX	Active	FLT15*01	A0364896		0216	0216	Y	Y	2015			
Details	5R82	173923	AD	AD94	FMD	2G1WA5E36E1173923				WV	CHEVROLET	IMPALA LIMITED	Active	FLT14006	A000361955		0216	0216	Y	Y	2014			
Details	5R82	179809	AD	AD94	FMD	1C3CCCFBXGN179809		POOL	POOL	WV	CHRYSLER	200	Active	FS21*02	A0379108		0216	0216	Y	Y	2016			
Details	5R82	193867	AD	AD94	FMD	2G11X5SA1G9193867	E038816	TIM	SYLVESTER	WV	CHEVROLET	IMPALA	Active	FLT16*64	A0373265		0216	0216	Y	Y	2016			
Details	5R82	432618	AD	AD94	FMD	2C4RDGBG4ER432618		POOL	POOL	WV	DODGE	GRAND CARAVAN	Active	FLT14061	A0364844		0216	0216	Y	Y	2014			
Details	5R82	694292	AD	AD94	FMD	1J4RR4GTXBC694292		POOL	POOL	WV	JEEP	GRAND CHEROKEE	Active	PCARD	A0438267		0216	0216	Y	Y	2011			
Details	5R82	736022	AD	AD94	FMD	1C4RJFBT5HC736022				WV	JEEP	GRAND CHEROKEE	Active	FLT17*12	A0377736		0216	0216	Y	Y	2017			
Details	5R82	741626	AD	AD94	FMD	1C4RJFAG5FC741626				WV	JEEP	GRAND CHEROKEE	Active	FLT14070	A0366106		0216	0216	Y	Y	2015			
Details	5R82	788609	AD	AD94	FMD	2D4RN4DG8BR788609		POOL	POOL	WV	DODGE	GRAND CARAVAN	Active	FLT11523	A000337146		0216	0216	Y	Y	2011			
Details	5R82	880575	AD	AD94	FMD	1C4NJRBB2ED880575				WV	JEEP	PATRIOT	Active	FLT14025	A0364834		0216	0216	Y	Y	2014			

Customizing a Search

1. In the top right under the **Options** gear, select **Customize**
2. From here, you can select different fields to add to the report
3. Once you have all the fields you want added checked, click **Apply,** and the new fields will be added at the end of the report

Holman Insights Search Tab

Saving a Search

1. In the top right under the **Options** gear, select **Save Search**
2. At the top left of the screen, a **Save Search Name** box will appear where you can type in a name for this search
3. The saved search will save under the **Saved Searches** tab

Holman Insights Search Tab

Exporting a search as an excel file

1. In the top right, you will find a tiny paper with an "**X**" in it. Click that to export a search report to excel.

Holman Insights Reporting Tab

The Reporting Hub is located under the Reporting tab. This is where the State of West Virginia's detailed reports are located

Holman Insights Reporting Tab

- The most important reports that you should use are the **Fixed And Operating Expenses** and the **LOV (Life of Vehicle) Operating Costs** reports
- These reports were custom built for the state of West Virginia
- The Fixed And Operating Expense Report and the LOV Operating Costs report are both now located under the Templates > My Organization section If you do not have either of these reports, please let us know and we will have them added for you

Holman Insights Reporting Tab

Fixed and Operating Report
1. To refresh the data, you need to click the **Circle arrows** button at the top of the screen
2. This will bring up the prompt box
3. Start and end dates are mandatory prompts
4. Date prompts need to be entered as a four digit year followed by a two digit month (EX: 201904)
5. Optional prompts are **Division** and **Prefix** (Division is cabinet and Prefix is Bill Code)
6. Multiple Divisions and Prefixes can be entered into this report

Holman Insights Reporting Tab

Fixed and Operating Report Tabs

1. **Summary** – Shows a summary of expenses in a graph format
2. **Expense Summary** – Shows a summarized breakout of expenses by expense type and
3. **Fleet Breakouts** – Shows expenses by an expense group and group detail
4. **Vehicle Detail** – Shows expenses per vehicle
5. **Vehicle Detail2** – Shows more detailed expenses per vehicle
6. **Op Exp by Qtr, Op Exp by Month, Cost PVPM, Fuel Exp by Month and CPM per month**-All are bar graphs
7. **Operating exp** – Shows operating expense totals
8. **Definition** – Gives an explanation of the report
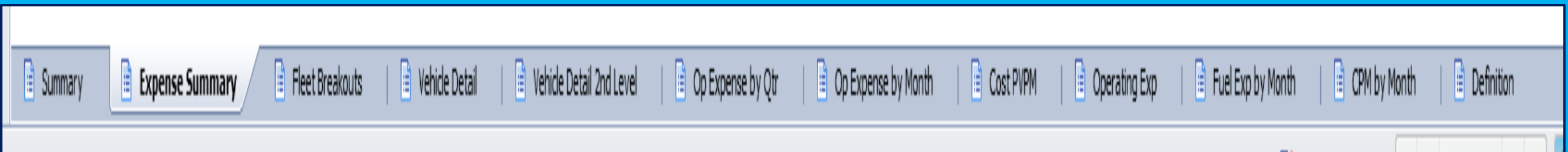
Holman Insights Reporting Tab

Saving Fixed and Operating report as an Excel file

1. Click on the **Export** button on the top left side of the screen
2. An export box will appear
3. Under **File Type,** select Excel (.xlsx)
4. This report can also be exported as a PDF
5. Click **Ok** and another prompt box should open asking if you want to open or save the file
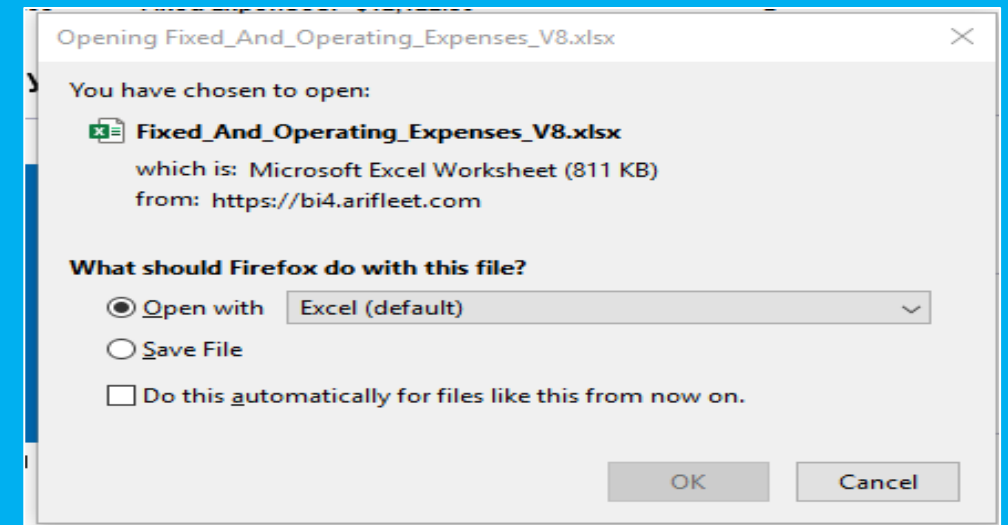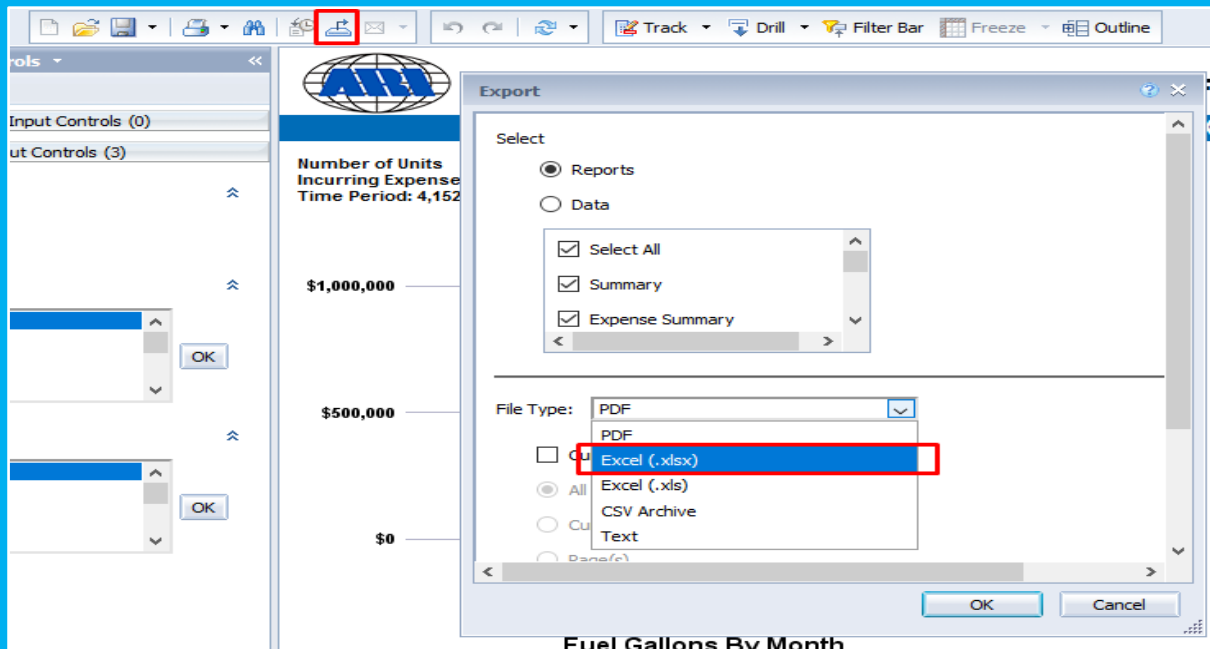
Holman Insights Reporting Tab

LOV Operating Cost Report

1. Shows a snapshot of active vehicles and their maintenance and fuel expenses broken out in different ways
2. Automatically runs when you open it
3. Contains a description tab that describes every field on the report
4. Is exported to excel the same way the Fixed and Operating report is

Client Code	Division	Prefix	Agency	AO/F/Cash	Dept.	Unit	ARI Veh No	VIN	Year	Make	Model	Lic Plate

Asset Type	Status	Under Utilize Form	Fuel Exceptions	MIS	Current Odometer	Commuting Miles	Last 180 days Average Monthly Miles	ARI Card#	ARI Card Use Last 30 Days	ARI Maint.	Grand Total Expense LOV	Grand Total Expense Per Month	Grand Total Expense Per Mile

Total Combined for Maintenance	Total Combined Maintenance per Month	Total Combined Maintenance per Mile	Fuel Transactions LOV	Fuel Dollars LOV	Fuel Gallons LOV	LOV Cost Per Mile Fuel	Last 180 Days MPG	Fixed Amount LOV	Fixed Amount Per Month	Fixed Amount Per Mile

Holman Insights Vehicle Purpose Field

- A Vehicle Purpose field was added to Holman so that FMD can better define what vehicles are being used for
- Agencies should pick and inform FMD of a purpose for each of their vehicles based on the list below and utilize the **DOA-FM-021** Vehicle Purpose form to notify us of any updates/changes
- A "-B" after the vehicle purpose means that that vehicle uses bulk fueling
- An "-X" after the vehicle purpose field denotes a vehicle FMD does not have to contact for fueling utilization purposes

Vehicle Purpose	Definition of Purpose
CAMPUS	Vehicles used on a campus setting, vehicles usually use bulk fueling
SPECIAL EQUIPMENT	Farm equipment, Emergency response, Heavy hauler: Usually a vehicle that has to be altered or has equipment physically added to perform it's task
EDUCATIONAL	Vehicle used to train someone how to operate a vehicle: Can also be used for maintenance and repair education
SEASONAL	Certain times of the year
VANCANCY	New hire, reduction in work force, Vacancy - *Date position became vacant must be entered*
SURPLUS	Pending sale, Destroyed, Retired
POOL	Shared by several employees
SPARE	Back up, not assigned to a person or daily task
MAIL RUNNER	Vehicle used for the purpose of providing mail type services
ASSIGNED	Vehicles that are assigned to a state employee, driver's name must appear in ARI

Holman Insights Adding a Manual PO

- **Log into Holman Insights:**
- **From the dashboard, select the Vehicles tab > Maintenance > PO History Entry**

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Holman Insights Adding a Manual PO

On the page, select in the drop-down menu for Client ID, 5R82. Type in the last 6 digits of the vehicle's VIN in the Vehicle Number box. Make sure that the option of PO Detail is selected. Click on the SUBMIT button

PO History Entry

Search Criteria

1. Please enter a Client and Vehicle or a Client and any combination of Serial, Make, Model

Client ID	Vehicle No	Lic Plate	VIN	Make	Model
5R82					

Submit   Reset

2. Select Purchase Order Detail or Driver Expense Reporting
◉ Purchase Orders   ○ Expenses

Holman Insights Adding a Manual PO

When this box appears, click the vehicle number link (In this example, 556830)

PO History Entry

Search Criteria

1. Please enter a Client and Vehicle or a Client and any combination of Serial, Make, Model

Client ID	Vehicle No	Lic Plate	VIN	Make	Model
5R82	556830				

Submit   Reset

2. Select Purchase Order Detail or Driver Expense Reporting
◉ Purchase Orders ○ Expenses

3. Select a vehicle

Client	Vehicle	VIN	Make	Model	Year	Lic Plate	Prefix	Division	Status
5R82	556830	1C4RJFAG1EC556830	JEEP	GRAND CHEROKEE	14	SA001944	3832	DH	In Service

Holman Insights Adding a Manual PO

This will be the box that appears next

Holman Insights Adding a Manual PO

Enter in the following information

1. Cient PO
2. Meter (Odometer)
3. Driver Name
4. Vendor Name
5. Invoice Number
6. Invoice Date
7. PO Total
8. PO Date
9. Under the **SERVICE** header, use the drop down box to select what is being done (e.g. tires, batter, etc)
10. Under the **REPAIR** header, use the drop down box to select Labor, Parts, PM, or Other
11. Under the **QTY** header, enter the quantity
12. Under the **COST** header, enter the cost
13. Select **TRUCK** or **CAR**
14. Enter any additional comments needed
15. Click on the **SUBMIT** button

Fleet Management

Agency Fleet Coordinator Training

Part 3- Fleet Management Division's Additional
Services and Programs

- Holman/Geotab Telematics
- Driver Training and Safety
- Fleet Commander Kiosk System
- WV Motorpool Online Reservation

Fleet Management Division's Services and Programs

- **Holman/Geotab Telematics**
  - **Telematics is a vehicle GPS unit that allows users to see data from the vehicle in real time**
  - **Holman and GeoTab offer a map that pinpoints each telematics vehicle**
  - **They also offer several reports that show trip logs, and such exceptions as speeding, idling, harsh braking, and vehicle health**

Fleet Management Division's Services and Programs

- **Driver Training and Safety**
  - **Through Holman, the Fleet Management Division offers a driver safety program that has many training modules that can help educate employees to be better drivers**

  The detailed information on the driver safety program can be found by clicking here

Fleet Management Division's Services and Programs

- **Fleet Commander Kiosk System**
  - **Reservations for our rentals can now be made through an online KIOSK system called Fleet Commander**
  - **The reservations are made online, and the driver can pick up the keys at a lock box that is located at Elizabeth Street parking by Laidley Field**
  - **The online reservation system can be found here:**

Fleet Management

Agency Fleet Coordinator Training

Part 4 – **wvOASIS**

https://myapps.wvsao.gov/apps/Portal/Default.aspx

- FA, FD, FM and FC Documents in the Financial Application
- Vehicle and Other Licensed Inventory Catalog Codes (02,03,32,50,24, and 85)
- FARCOMP Page in the Financial Application
- AM-17V Vehicle Inventory Report
- AM-006 Assets Retired Report
- AM-043 Asset Documents Report
- Vehicle Related Expenses Through BI Reporting
- Object and Sub-Object Codes

wvOASIS

FA Documents
- Fixed Asset Acquisition document
- Document used to put an asset into OASIS
- FMD creates the FA documents for the vehicles that are financed through them
- The agencies create FA documents for the vehicles that they own
- When entering vehicles, it is important to be as descriptive as possible
- Component-Specification tab important items:
  - Vehicle Make = The make of the vehicle
  - Vehicle Model = The vehicle model
  - Vehicle Year = The vehicle's model year
  - Serial Number = The VIN of the vehicle
  - VIN = The VIN of the vehicle

FA Documents (Cont.)

- Component-Component Classification Fixed Asset Catalog
  - 02 = 1 Ton and Under vehicles
    - 1 Ton and Under is not based on weight, rather it is based on a classification of vehicles
    - EX: F-350, Ram 3500, Silverado 3500 and under would be considered 1 Ton and Under
  - 03 = Over 1 Ton
    - Also not based on weight, but based on a classification of vehicles
    - EX: F-450, Ram 4500, Silverado 4500 and up would be considered over 1 Ton
  - 32 = Agency 3rd-party Leased vehicles
    - Vehicles that an agency leases for a year or more from a private company
  - 50 = Licensed Trailers
  - 24 = Licensed Mobile Homes
  - 85 = All Terrain Vehicle – ATV Licensed*

  - Differentiated from catalog code 84 All Terrain Vehicle – ATV Unlicensed catalog code

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![wvOASIS]

FA Documents

- Component-Specification tab includes fields you must use when you enter a vehicle into wvOASIS and what fields you can use additionally
  - Required fields
    - Vehicle Make
    - Vehicle Model
    - Vehicle Year
    - You will use both Serial Number and VIN fields to record the vehicle's VIN number
  - Optional fields
    - Weight
    - Size
    - License Plate
    - Fuel Type

FD Documents

- Used to retire a vehicle
- When an agency is exempt from WVSASP, FMD will approve the FD once the required documentation is attached to the header
  - Applicable documents will depend on the disposition method. Review Add a Fixed Asset Disposal (FD) (Retirement) instructions available under the *Helpful Links* section of our site **https://fleet.wv.gov/AFC_Resources/Pages/default.aspx**
  - Pending FDs for FMD owned vehicles are reviewed every three months
- Methods of disposition for a vehicle
  - DTSP (Deliver to WVSASP)
  - ONST (Sell onsite)
  - TRAD (Trade-in)
  - SCRP (Sell for scrap)
  - RECY (Recycle/dispose as waste)
  - LOST (Lost asset)
  - INTS (Internal sale)
  - STOL (Stolen asset)
  - DEST (Destroyed asset/total loss)
  - CLEA (Canceled 3rd-party leased vehicle)
  - WAST (Dispose as waste)
  - UNAU (Unauthorized Disposal)

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wvOASIS

FM Documents

- Used to modify existing vehicles in OASIS
    - Things that usually get modified include:
        - Vehicle Year, Make or Model
        - VIN numbers
            - Requires approval from WVSASP with documentation attached to the header
        - Catalog codes
        - Custodian codes

FC Documents

- Used to cancel a fixed asset entry in wvOASIS
- Usually used to cancel duplicate fixed asset entries of the same VIN
- Should be used if financial details included on FA entry were incorrect. The Accounting tab cannot be modified with an FM document

wvOASIS

FARCOMP

1. This is the OASIS Financial Application page that you can search for active assets
2. Can search on multiple fields, the two most used being Fixed Asset Number and Serial Number
3. An asterisk (*) can be used as a wild card in any search field
   - Ex: Serial Number can be searched using the last six of the VIN *012345

FARCOMP (Cont.)

- The Department of Motor Vehicles Requires a printout of the **FARCOMP** page with the General Information, Specification, and Acquisition/Disposition tab expanded in order to get a license plate for a vehicle

wvOASIS

Fixed Asset BI Reports

1. WV-FIN-AM-017V Vehicles by Department
2. WV-FIN-AM-006 Assets Retired
3. WV-FIN-AM-043 Fixed Asset Documents

wvOASIS

Fixed Asset BI Reports

- WV-FIN-AM-017V Licensed Inventory by Department
  - Shows an OASIS inventory of the vehicles you own
  - Run for catalog codes **02;03;32;50;85;24**

Report ID:	WV-FIN-AM-017V	State of West Virginia	wvOASIS
Run Date:	04/25/2019	wvOASIS - Data Warehouse	
Run Time:	11:27:21 AM	Vehicles by Department	

Cover Page
No Records Found

Prompts and Parameters
Department(s):
Unit(s):
Fund(s):
Fixed Asset Type(s):
Fixed Asset Catalog(s):
Major Program(s):
Program Code(s):
Phase Code(s):
Asset Location Code(s):
Asset Sub-Location Code(s):
Asset Description:
Commodity Code(s):
Aquisition Date (Start):
Aquisition Date (End):
In Service Date (Start):
In Service Date (End):
Depreciation Begin Date:
Depreciation End Date:
Greater than or Equal to Disposition Date:

Report Description
This report will list vehicles by departments. The report is set to pick up fixed asset catalog codes 02;03;22;24;49;84 only. See the AM-017 to run an asset report on all catalog codes.

If you run this report after June 30th and want see the active assets for the previous fiscal year make sure to fill in the "Greater than or Equal to Disposition Date:" Prompt with July 1st of the current fiscal year.

The "Depr by Selected Date Range" column will show you the asset's depreciation from the start of OASIS if you do not put in a depreciation date range. If you want to see an asset's depreciation for a fiscal year put in the date range of July 1st to June 30th.

Fixed Asset BI Reports
- WV-FIN-AM-006 Assets Retired
  - Will show the licensed inventory that has been decommissioned in OASIS
  - Run for catalog codes **02;03;32;50;85;24**

Report ID:	WV-FIN-AM-006	State of West Virginia
Run Date:	06/14/2016	wvOASIS FIN Data Warehouse
Run Time:	10:50:14 AM	Assets Retired

From to

Cover Page

No Records Found

Prompts and Parameters

Run Date:	06/14/2016
Run Time:	10:50:14 AM
Disposition START Date:	
Disposition END Date:	
Run START Date:	
Run END Date:	
Department:	
Fixed Asset Type:	
Fixed Asset Catalog:	
Fixed Asset Number:	

Report Description

This report lists all retired assets per Department for the user entered date range. The report sorts by Department, Fixed Asset Type, Fixed Asset Catalog, and Fixed Asset Number. The report has required prompts on Disposition Date and optional prompts on Department, Fixed Asset Type, Fixed Asset Catalog, Fixed Asset Number, and Run Date range.

Fixed Asset BI Reports

- WV-FIN-AM-043 Fixed Asset Documents
  - Will show all fixed asset documents in any state or phase
  - Run for catalog codes **02;03;32;50;85;24** to see licensed asset related documents

Report ID:	WV-FIN-AM-043	State of West Virginia
Run Date:	04/25/2019	wvOASIS FIN Operational
Run Time:	8:25:17 AM	Fixed Asset Documents

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Prompts and Parameters
Run Date:	04/25/2019
Run Time:	8:25:17 AM
Department(s):	
Unit(s):	
County(s):	
Doc Dept Code(s):	
Doc Code(s):	
Doc Phase(s):	
Fixed Asset Number(s):	
Fixed Asset Catalog(s):	
Aquisition Date (Start):	
Aquisition Date (End):	
In Service Date (Start):	
In Service Date (End):	
Run START Date:	
Run END Date:	

Report Description
This report lists all fixed asset documents. The report sorts the documents by Department, Fixed Asset Type, and Fixed Asset Catalog.
In order to get all documents that have not gone final you will want to run this report for Doc Department instead of Department.

Doc Phase Code	Doc Phase
1	Draft
2	Pending
3	Final
5	Historical (Final)
6	Conflict Draft

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Vehicle Expense Reporting in Business Intelligence

- WV-FIN-GL-146 Document Listing
- Certain Objects and Sub-objects will list out all vehicle related expenses

WV-FIN-GL-146

Report ID: WV-FIN-GL-146
Run Date: 04/25/2019
Run Time: 7:48:53 PM

State of West Virginia
wvOASIS - Data Warehouse
Document Listing

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No Records Found

Parameters and Prompts

Run Date:	04/25/2019	Fund(s):	
Run Time:	7:48:53 PM	Appropriation(s):	
Fiscal Year(s):		Object(s):	
BFY:		Sub-Object(s):	
Accounting Period(s):		Actg Line Dept(s):	
Record Start Date:		Revenue Source(s):	
Record End Date:		Major Program(s):	
Posting Code(s):		PPC(s):	
BSA:		Phase(s):	
Event Type(s):		Program(s):	
Closing Classification(s):		Sub-Revenue Source(s):	
Doc Code(s):		Activity:	
Bureau(s):		Sub-Activity:	
Section(s):		Function(s):	
Group(s):		Sub-Function(s):	
District(s):		Location(s):	
Division(s):		Sub-Location(s):	
Unit(s):		Doc ID(s):	
Vendor Code(s):		Vendor Legal Name(s):	
Doc Run Date(Start):		CFDA Number(s):	
Doc Run Date(End):		Department(s):	
Doc Dept Code(s):		Last Modified User Id(s):	
		Sub-Fund(s):	

Report Description:

This report provides a listing of document for a user specified fiscal year and accounting period. The report includes additional prompts to assist in filtering the list of documents these include objects such as Doc Code, Closing Classification (Cash Expenditure, Accrued Expenditures, etc), Record Date. Along with the document number, the report displays a number of ledger elements including, but not limited to, fund and cost accounting chart of account elements, posting code, posting amount, etc.

wvOASIS

WV-FIN-GL146 prompts to enter

- Mandatory prompt for Fiscal Year (For annual report run this for previous fiscal year)
- Enter a Closing Classification of 10 which is Cash Expenditures
- Enter Object codes **3211;3212;3216;3225;3235;3265;5211;6105**
- Enter Sub-object codes
  3516;3517;3520;3523;3524;3527;4087;4232;4233;H127;T000;3530;3531;3534;3537;3538;3541;4217;4218;4221;4224;4225;4228;H128;T000;3569;3570;3571;3572;4001;4344;H132;T000;3614;3615;3616;3617;3619;3620;3621;H140;T000;3657;3659;4358;H150;T000;3842;5315;5316;5317;5318;5342;H302;T000;6000;6211;H256;T000
- You should only see data for your department based on OASIS security
- These prompts will show all vehicle related expenses for a fiscal year

THANK YOU FOR ATTENDING

- The Fleet Management Division appreciates the teamwork each of you provide to the State of West Virginia's management of the state's vehicle assets.
- If any agency would like a fleet review that highlights vehicle utilization and correct sizing, please contact anyone at FMD

This completes the 2023 AFC four-part virtual training

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State of West Virginia
Fleet Management Division