



Enterprise Fleet Management System

University of Wisconsin Portal User Guide

Link: <https://fleetportal.wi.gov>



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The Enterprise Fleet Management System was developed by the Department of Administration Division of Enterprise Operations and Division of Enterprise Technology in collaboration with Fleet Managers and staff from the Department of Corrections, Department of Natural Resources, Department of Transportation and University of Wisconsin—Madison.

Updated September 29, 2017



Introduction and Login

The new Enterprise Fleet Management System (EFM) is designed to give state drivers, Fleet Coordinators and Fleet Managers the tools they need to efficiently reserve vehicles, report mileage, track vehicle usage and better manage our state vehicle assets. Following are several upgrades:


Electronic Vehicle Use Agreements: We're going paperless. Before a driver can operate a state vehicle, they must sign a Vehicle Use Agreement (VUA) where the driver acknowledges they have reviewed state driving policies and meet state eligibility requirements. Now state drivers' VUAs will be submitted and stored electronically.

Drivers will no longer need their driver's license number to log into the fleet portal. For UW Campuses students and staff will use their Campus ID (NET ID/PANTHER ID/...) to log into the system. Campus volunteers will continue to fill out paper VUAs and be manually entered into the new system by the VUA coordinator.

Up- to-date information: Information on the fleet portal has been updated. Drivers will find the latest safety tip from the Department of Transportation and links to weather conditions and road construction conditions. There is a new Driver's Guide to help drivers with procedures for using the Voyager gas card and renting vehicles at the different agency vehicle pools. There is also a new FAQ to help drivers quickly find the answers to their fleet questions.

Getting Started – Log-in Page

1. You will first be asked if you are a State Employee, UW Employee or Volunteer. Please select UW.




Enterprise Fleet Management System

FLEETPORTAL UAT

Select type of employee

UW

Select



The Enterprise Fleet Management System allows State of Wisconsin government employees and University of Wisconsin employees access to state fleet vehicles and the tools they need to perform state fleet-related duties. They can reserve state vehicles, report mileage, and access forms and information about state fleet procedures and policies. If you have fleet questions, contact Department of Administration Central Fleet at 608-266-8757. If you have difficulty accessing this site, please call the Help Desk at 608-267-6930.


You are about to access a State of Wisconsin computer system. This is a restricted computer system for authorized users only. All equipment, systems, services, and software connected to this system are intended only for official business use of the State of Wisconsin, and may contain U.S. Government information. All data contained on this system is owned by the State of Wisconsin. The State of Wisconsin reserves the right to audit, monitor, record and/or disclose all transactions and data sent over this system in a manner consistent with State and federal law. Use of this system by any user, authorized or unauthorized, constitutes consent to monitoring, recording, reading, copying, or capturing and disclosure of data and transactions by authorized personnel. Only software and/or hardware approved, scanned, and licensed for State of Wisconsin use is permitted on this system. Any illegal, unauthorized use or modification of the State of Wisconsin data, equipment, systems, services, or software by any person(s) is prohibited and may be subject to civil or criminal prosecution under state and/or federal laws, and may also result in disciplinary action where appropriate.

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Contact Us

By Phone: DOA: 608-266-8757 | DOT: 608-266-1910 | UW: 608-262-1307
Feedback: fleetinfo@wi.gov

2. Next you will choose your appropriate campus.




Enterprise Fleet Management System

FLEET PORTAL

UW Campus

UW Madison

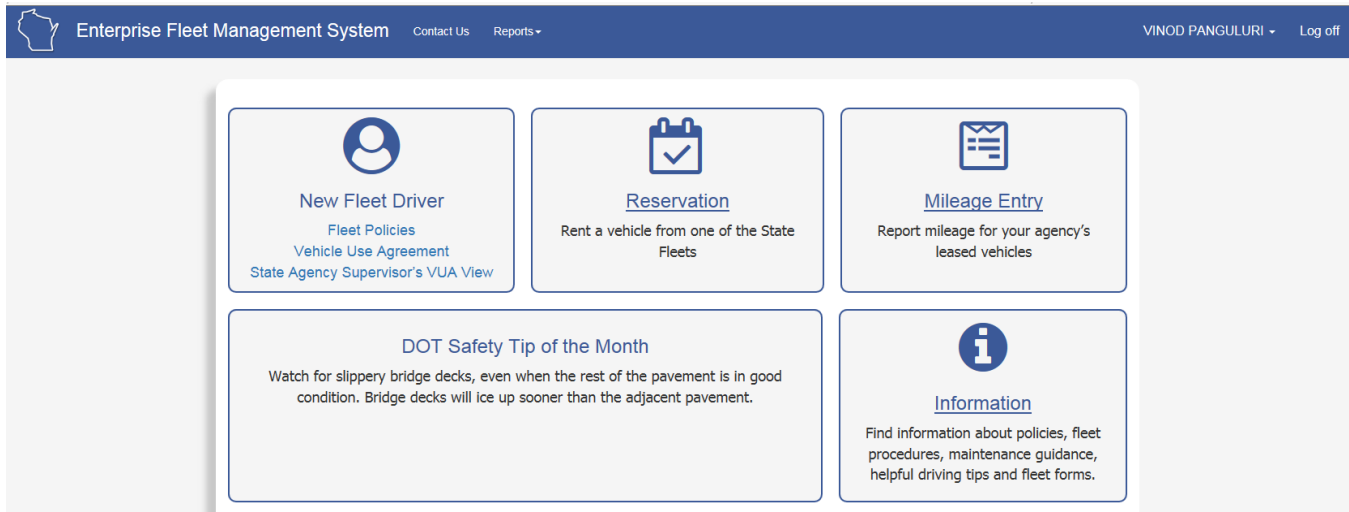
Ligon





3. Next, you will be asked to provide your username. Please use your Campus login ID (NETID/PantherID/...).
4. After logging in, you will see the home page. The home page consists of New Fleet Driver, Reservation, Mileage Entry, DOT Safety Tip of the Month and Reports. If you have any past vehicle reservations or mileage entries, you will have dashboards at the bottom of the page. You can view useful information such as FAQ's, road conditions, Driver Guide, Fleet Rates and much more! *[Note: when you log in for the first time, you will be taken directly to the electronic Vehicle Use Agreement form.]*

Home Page



All drivers must sign a Vehicle Use Agreement (VUA) and submit the completed VUA prior to operating a state or University vehicle. Before driving a state or University vehicle, each driver must become thoroughly familiar with the Preface and Chapter One of the *Fleet Driver and Management Policies and Procedures Manual*.

The VUA is an agreement electronically signed by a driver of state vehicles acknowledging they have reviewed state driver policies, are eligible to operate a state vehicle, agree to inform their supervisor of a change in eligibility and agree to a monthly check of their driving status. New electronic VUA policies are provided in the *Addendum to Fleet Driver and Management Policies and Procedures*.



We're going paperless! All VUAs will be completed and stored electronically. A driver can print their VUA and the personally identifiable information will be blocked on the printed form.

- Drivers log into the site with their campus ID and password. Unlike the previous Fleet Portal where drivers had to log in with their driver's license number, completing the VUA will be the only time a driver will need their driver's license number.
- Seamless approval process for the University drivers.



Completing a VUA

1. **Review State Fleet Policies.** New state vehicle drivers should first click on the Fleet Policies and review Chapter One and the VUA addendum before completing a VUA.
2. **Driver information:** The VUA first requests driver information. The first name and last name will auto-populate. The driver should complete the remainder of the fields. Boxes marked with a red “*” are required fields.

***Helpful hint:** Have your license number ready so you can complete the form before it times out.*

3. **Employee Agreement:** The driver should click on each box in the Employee Agreement that accurately reflects the driver’s record. All boxes must be checked for a VUA to be accepted. If a driver cannot check all boxes, they are not eligible to drive a state or University vehicle.
4. **Signature:** By typing their name and the date in the Signature portion of the VUA, the driver has electronically signed the document. After the driver clicks on Submit, their VUA will be reviewed by the campus VUA Coordinator.
5. **The VUA will be stored electronically.** However, once a VUA is submitted, a green Print box will appear at the top of the page and the driver can print a paper copy of their VUA. Personal identifiable information like the driver’s license number and the driver’s birthdate will be redacted.

Vehicle Use Agreement

Instructions

All State Employees and UW System employees, students & volunteers driving a state-owned vehicle must complete this form.

- State employees who choose not to sign this agreement may use their personal vehicle for state business, if they are authorized by their agency and have a valid driver’s license.
- UW System employees, volunteers and students must have a signed and approved VUA and meet all applicable driver authorization requirements of their campus to drive for business purposes.

The employee or UW System student’s immediate supervisor and the agency’s fleet coordinator will be notified when the form is completed.

If any information provided on this form should change, it is the employee’s responsibility to promptly update their information. If you have any questions, please contact your fleet coordinator.

Out of State Driver’s License or Less than Two Years Driving History:

Driver’s with an out of state driver’s license, must provide a driving abstract from that state showing the last two years driving history and their driver’s license. Wisconsin driver’s with less than two years driving history, must also provide a driving abstract from the other state showing the last two years driving history and driver’s license. Please upload these documents using the fields below by clicking on browse/choose file to locate the documents on a local drive. Only PDF files will be accepted.

No file chosen

No file chosen



Driver Information

First Name A	Last Name K	Middle Initial
Date of Birth (mm/dd/yyyy)* <input type="text"/>	Email* <input type="text"/>	
Driver License* <input type="text"/>	License State* WI	
UW Campus* Please Select...	UW UDDS Code* <input type="text"/>	
If you are a UW Student please check the box <input type="checkbox"/>	If you are a UW Volunteer please check the box <input type="checkbox"/>	
Supervisor Email <input type="text"/>	Supervisor Name <input type="text"/>	

Please select your campus then start entering your UDDS code to bring up a listing of codes/departments.

Employee Agreement

☐ I acknowledge that I have received and/or read a copy of the statewide [Fleet Driver and Management Policies and Procedures](#) I understand the contents and agree to comply with the policies. Failure to comply is considered a violation of work rules.

☐ As a condition of my driving a state-owned vehicle, I agree to a check of my driving record on a periodic basis.

☐ I further agree to immediately inform my supervisor and agency fleet manager/coordinator of any negative change in the status of my driving record. I will also inform them in writing whenever I become disqualified under state fleet policies. Changes include but are not limited to OWI/DUI citation, license revocation, restriction or suspension. Failure to report such changes may result in the revocation of the privilege of driving a state-owned vehicle and discipline up to and including termination.

☐ I acknowledge that I meet the stated minimum standards.
An employee may be allowed to drive a state-owned/leased vehicle if all of the following minimum standards are met:


- Must have a valid driver license
- Must have a minimum of two years licensed driving experience, and
- Must be eighteen (18) years of age

☐ I acknowledge that my driving record does not reflect any of the listed conditions.
An employee may not be able to drive a state-owned vehicle if their driving record reflects any of the following conditions:

- Three (3) or more moving violations and/or at fault accidents in the past two (2) years
- An OWI or DUI violation within the past year (OWI/DUI violations are for operating a vehicle while under the influence of an intoxicant, controlled substance or other drug.)
- A Suspension or Revocation of the driver license

Signature

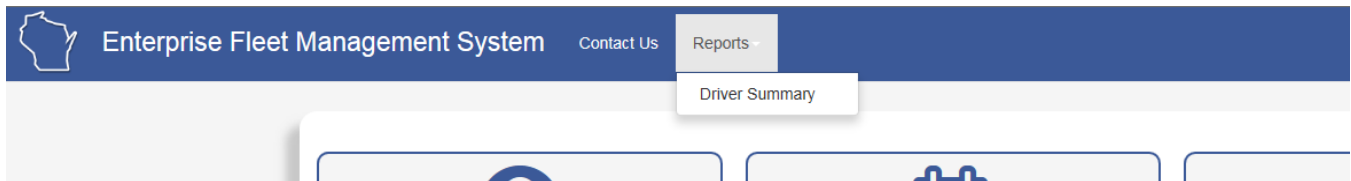
The Department of Administration requires that you certify your Vehicle Use Agreement by submitting an electronic signature. By electronically signing this documents, I certify that above information is accurate and true.

Please type your name(Electronic Signature)* **Today's Date*** 



Driver Summary Report

The Enterprise Fleet Management Portal will provide a Driver Summary report to search for drivers in the system. Any user will be able to find this information.



1. One driver: Find information on a driver at your agency by entering their first and last name in the boxes. Click on “View Report” and find information about the driver that includes the employee’s status and supervisor.
2. All drivers: Find all the active drivers at your campus by clicking on “View Report.” All of the active drivers at your campus will be listed.
3. Department: Type in the UDDS code and click on “View Report.”

Note: Van Certified drivers have completed required training and are eligible to drive 15-passenger vans.

Driver Summary

UDDS	<input type="text"/>	Driver Status	Active ▼	View Report
First Name	<input type="text"/>	Last Name	<input type="text"/>	



Reservation

Rent a vehicle from DOA Central Fleet,
DOT Fleet or UW-Madison Fleet

Before making a reservation for a state vehicle, all drivers must sign and submit a Vehicle Use Agreement (VUA). (If you have not previously submitted a VUA, go to the “New Driver” button on the Home Page to complete one.)

There are several motor pools available to state and UW employees. Department of Administration (DOA) Central Fleet and UW-Madison Fleet have vehicles available for state employees and UW employees and students in the Madison area. Vehicles in the Department of Transportation (DOT) Motor Pool and the Department of Corrections (DOC) Motor Pool are currently only available to employees working at their agency.

State drivers can rent a state vehicle whenever they need to travel for official state business and it has been approved by their supervisor. State vehicles cannot be used for personal use. Renting a state vehicle in the EFM Portal is quick and easy:



- Making reservations for another driver is now much easier.
- The Home Page will display a dashboard with the driver’s past and pending reservations as well as mileage entries.
- Approval for the vehicle rental and to allow commuting is completed electronically through the portal.



Reserve a Vehicle for Another Driver

1. Are you the driver? Select “No.”

Reservation
* Please let us know if you're making a reservation for yourself or if you're acting as a delegate for someone.

Are You the Driver?

2. You will be asked to enter the username of the employee who will be driving the vehicle.

Helpful hint: get the driver's username before starting the reservation.

Reservation
* Please let us know if you're making a reservation for yourself or if you're acting as a delegate for someone.

Are You the Driver?

Enter Username of the Driver

[Make New Reservation](#)

3. Click on “Make New Reservation” and follow instructions starting with Number 2, below.

Make Your Reservation

- Are you the driver? Select “Yes” and click “Make New Reservation.”

Reservation
* Please let us know if you're making a reservation for yourself or if you're acting as a delegate for someone.

Are you the driver?

[Make New Reservation](#)

- Provide the driver's information requested.

Driver Information

Driver Name	VINOD PANGULURI	Username	panguluri@wisc.edu	Email	Shari.Hillery@wisconsin.gov
Phone No.		Department	UW MADISON		
Approver Name	<input type="text"/>	Approver Email	<input type="text"/>		

Required if reserving from DOA Central fleet.

- Fill in the reservation information using the drop-down arrows for assistance.

Reservation Information

Pool Location	UW CAR FLEET	Vehicle Type	CAR SMALL SEDAN
Pickup Date	8/30/2017 6:00 AM	Destination State	WI
Return Date	8/31/2017 5:30 AM	Destination City	Madison
No. of Passengers	1		
Customer Comments	Field House		

* Select the closest city if you do not find it in the drop down list.

- Provide Your Use Code or TNumber. UW Madison will use TNumber and other campuses will use their appropriate use code.
 - Use Code: A use code directs the bill for services to the program areas that used the service.
 - TNumber: A T-number is a special type of use code for University funding. If a state agency driver wishes to reserve from the UW Fleet, the driver will need to get a T-number from the UW.

Reservation Information

Pool Location	Choose a Pool...	Vehicle Type	
Pickup Date	7/6/2017 8:00 AM	Destination State	
Return Date	7/7/2017 8:00 AM	Destination City	
No. of Passengers			

Use Codes

Click on the "Add New Record" button associated to the use code.

+ Add new record

Use Code and TNumber

Use Code: A use code directs the bill for services to the program area that used the service. When you rent or lease a state vehicle from the Department of Administration, the use code provides information on which program area is billed for the vehicle rental or lease. If you are unsure about the appropriate use code ask your supervisor or your financial department.

TNumber: A T-number is a special type of use code for University funding. Billing to any UW Madison, UW Extension, UW System Administration, or UW Colleges funding for fleet travel requires the use of a T-Number. T-numbers are used for rental from both the DOA fleet and from the UW Madison fleet. Billing to other UW campuses requires a use code specific to that campus. Write to fleetfunding@fpm.wisc.edu for questions about T-numbers.



+ Add new record

Use Code / T-Number / Project Code	Percentage	
		<div><div>Edit</div><div>Delete</div></div>

- Click “Edit” and two empty boxes will appear. Click in the box to enter the information. If several different codes should be charged for the cost of the vehicle rental, provide the percentage that should be charged to each code. Click on “Add a new record” to add another use code. The percentage amounts must equal 100 percent.
- Select “Find Availability.” If the vehicle type that was selected is available, then select “Make Reservation.” If a vehicle is not available, select a different vehicle type and follow same process. The driver will receive a message asking if they would like to make another reservation.

New Reservation

Do you want to make another reservation?

Yes

No

- The driver’s reservation is automatically confirmed. Reservations will be listed on the “My Vehicle Reservations” dashboard.

My Vehicle Reservations Dashboard

The “My Vehicle Reservations” dashboard will provide drivers quick and easy access to their reservation information and allow them to easily cancel reservations when travel plans change.

My Vehicle Reservations					
Show History					
Reservation Number	Start Date	End Date	Status		
100022	08/31/2017	09/08/2017	Waiting List	Cancel Reservation	Edit Reservation
100023	08/30/2017	08/31/2017	Confirmed	Cancel Reservation	Edit Reservation
100024	08/30/2017	08/31/2017	Confirmed	Cancel Reservation	Edit Reservation

- Review all the information about your reservation:** Look at your reservation information by clicking on the blue confirmation number in the “My Vehicle Reservations” dashboard.
- Cancel your reservation:** The expanded dashboard allows drivers to cancel their reservations.
- Edit your reservation:** The expanded dashboard allows drivers to edit an existing reservation.



Mileage Entry

Report mileage for your agency's
leased vehicles

Monthly mileage reporting is required for leased, assigned and work-shared state vehicles. Reimbursement for any personal miles must be included with the monthly mileage report.



- More than one mileage entry can be made each month.
- No need to worry about mistakes anymore. The mileage report can be edited. For Central Fleet vehicles, edits and entries can be done until the 5th of every month, when the billing process begins.
- Any employee in your organization can enter mileage for the vehicles assigned to your agency, campus or work unit. All they need is the equipment ID of the vehicle and its new odometer reading to enter the miles.
- Two new dashboards are provided right on the Home Page with information on recent mileage reports and on personal mileage.



Enter Mileage

1. Enter the Equipment ID number and click “Enter Miles.” Mileage can only be entered for vehicles owned or leased by your campus.

[Back to Home](#)

Equipment ID: [Enter Miles](#)

Mileage Management - Vehicle List

Equipment ID	Reported Date	Reporting Month	Reporting Year	Miles Reported	Personal Miles	Reported By
UA000174	08/30/2017	Mar	2017	100	0	
UA000174	08/30/2017	Apr	2017	954	50	
UA000174	08/18/2017	Dec	2016	89	0	

Un-Paid Monthly Personal Usage

Please click on the Print Invoice below to pay for your Personal Miles if you have any.

Mileage ID	Personal Miles	Cost	Created On	Created By	Reported For
------------	----------------	------	------------	------------	--------------

Mileage Entry

Equipment AD103333 Make CHEVROLET Model ID 1500 SUBURBAN Model Year 2010

Last Mileage Entered Month Apr Year 2017 Last Odometer 155350

Odometer End Personal Miles County

[Save](#) [Cancel](#)

Use Codes

Use Code	Percentage
A05101505	100

1 - 1 of 1 items

2. Enter the last odometer reading in the “Odometer End” box. If a driver used the vehicle for personal use, like commuting, they must enter their personal miles in the “Personal Miles” box. The Portal will automatically calculate the sales tax from the county where the driver resides. Click “Save.”
3. A pop-up will let the driver know they have successfully saved the new mileage.



4. After updating the mileage entry, the driver will see the new mileage on the “Mileage Management – Vehicle List” dashboard.

Mileage Management - Vehicle List						
Equipment ID	Reported Date	Reporting Month	Reporting Year	Miles Reported	Personal Miles	Reported By
UA000174	08/30/2017	Mar	2017	100	0	
UA000174	08/30/2017	Apr	2017	954	50	
UA000174	08/18/2017	Dec	2016	89	0	

Personal Mileage

Internal Revenue Service (IRS) rules provide that the personal use of a state vehicle includes commuting to and from work, even if the vehicle is taken home for the convenience of the state. Personal use is considered a fringe benefit by the IRS and would be taxed as part of the employees’ income, unless the employee reimburses the state for the full value of the personal mileage.

Drivers who claim personal mileage will see the “Un-Paid Monthly Personal Usage” dashboard on the Home Page and on the Mileage Entry Page.

Un-Paid Monthly Personal Usage				
Mileage Id	Personal Miles	Cost	Created On	
201704-AD103333-I c	20	10.81	4/11/2017	Print Invoice

To pay the personal mileage, please print the invoice and mail the invoice and a personal check to your appropriate campus.



Information

Find information about policies, fleet procedures, maintenance guidance, helpful driving tips and fleet forms.

The Enterprise Fleet Management System Portal has new and updated documents and links to assist state drivers with fleet pick-up and drop-off procedures, road conditions, accident procedures and much more. Drivers can also access information about specific agency fleets on the fleet tabs. Below is a list of the documents and links provided to assist state drivers:

Accident Incident Report - Bureau of Risk Management Form DOA 6494 must be completed if a state vehicle is involved in an accident.

Agency Contacts - This directory provides names and contact information of state agency fleet coordinators and fleet managers.

Central Fleet Rates - This rate schedule provides amounts the Department of Administration sets for renting a vehicle from Central Fleet and for leased vehicles.

Driver Guide - Get “How To” information about procedures to rent a state vehicle, report an accident, use the Voyager gas card, vehicle maintenance and much more.

Driver Report of Accident - Form MV 4002 can be completed if the police do not respond or do not complete a Wisconsin Motor Vehicle Accident report.

E85 Fueling Station Locations - Link to the U.S. Department of Energy website to find gas station locations along your route for Ethanol (E85) fuel.

Fleet FAQ's - Here's a quick guide to frequently asked fleet questions.

Portal User Guide - Having trouble using the Fleet Portal site? This guide walks you through the process of completing a VUA, reporting mileage, making a reservation and running reports.

Road Conditions - Link to the DOT website for up-to-date information on road conditions in Wisconsin.

Safelite AutoGlass - Cracked Windshield? Here is information on the state's contract with Safelite AutoGlass with instructions on repairing a damaged vehicle window.



Safety Tips - Link to the Department of Transportation website, filled with information to help improve your safe-driving habits.

Uniform Travel Guide - Section F of the Division of Personnel Management Compensation Plan lists requirements for state employee travel.

UW-Madison Fleet Information - Find more information about UW-Madison Fleet by linking to their website.

UW-Madison Fleet Lot Map - A map of the UW-Madison Fleet parking lot will assist drivers in finding their rental vehicle.

UW-Madison Fleet Rates - The rate schedule provides the amounts set by UW-Madison for vehicle rentals.

Vehicle Assignment Transfer Form - Form DOA 3102 is used to reassign leased vehicles.

Vehicle Use Agreement - Before a driver can operate a state vehicle, they must sign a Vehicle Use Agreement (VUA) where they acknowledge they have reviewed state driving policies and meet state eligibility requirements.