
Creating Vehicle Requests

Overview

Vehicle requisitions, including additions, replacements, donations and leases, are submitted, reviewed, and approved using the State of Georgia Forms in VITAL Insights. The process has three levels of review—agency, Office of Fleet Management (OFM) and Office and Planning and Budget (OPB).

There are two types of vehicle requests—an addition to the fleet and a replacement for an existing vehicle in inventory.

Process Overview

The VR process goes through at least four submittal levels:

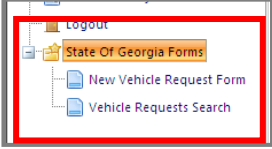
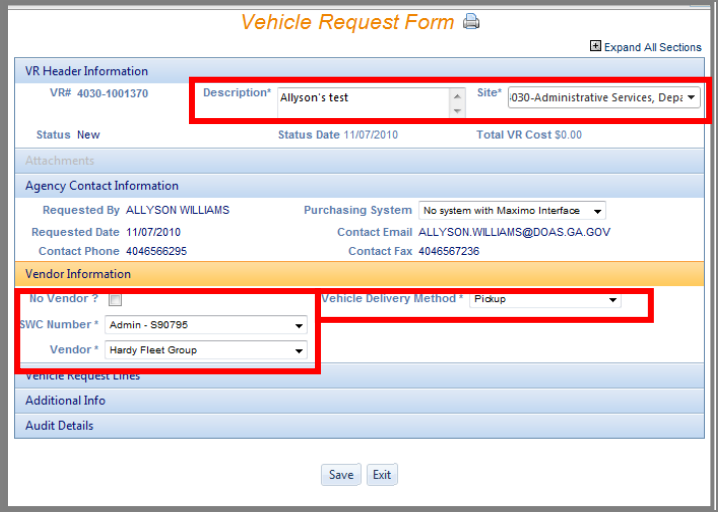
- Agency requestor
 - Completes the initial request and provides new/replacement vehicle information, vendor information
- Agency approval process
 - Every agency has at least one person who approves the acquisition of the vehicle and ensures that all necessary agency procedures have been followed for acceptance and payment of the vehicle.
- OFM approval
 - After the VR has cleared the agency approval level, the Office of Fleet Management ensures that the agency has met fleet policy requirements.
- OPB approval
 - Finally, OPB reviews the request to ensure adequate funding and justification for the purchase.

Required Information

In order to complete the vehicle request, the following information will be required:

- Type of vehicle request—replacement or addition
 - If replacement, state-id of vehicle that will be replaced
 - Desired vehicle information (year, make, model, fuel type, alternative fuel vehicle, GVW)
 - Assigned status of new vehicle
 - Statewide contract, if applicable
 - Vendor information (address and contact information)
 - Intended use of the vehicle
 - Justification for vehicle purchase including maintenance cost of replacement vehicles
 - Budget program information (this information can be obtained from agency budget officials)
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Creating Vehicle Requests

Step	Action
1.	<p>In the Menu Options, open the State of Georgia Forms folder and select New Vehicle Request Form.</p> 
2.	<p>The Vehicle Request Form window opens as pictured below. Complete the information below:</p>  <ul style="list-style-type: none"> • VR Header Information <ul style="list-style-type: none"> ○ VR# - The system auto-populates a number that begins with the 4-digit Site ID for your agency. ○ Description – Enter a short phrase that identifies this request. ○ Site – Select your agency Site ID by typing in either the 4-digit site ID or your agency name. • Attachments (Optional) - Upload any relevant documents in PDF format. • Agency Contact Information - the requestor information is pulled directly from the user id record. <ul style="list-style-type: none"> ○ Contact OFM to make changes to your user record if the contact information is incorrect. • Purchasing System – Select Other or Peoplesoft. <ul style="list-style-type: none"> ○ The new system does not interface with Peoplesoft. This field captures the type of purchasing system for this vehicle request. • Vendor Information – Select No vendor or Statewide Contract. (Statewide contract information is available on Team Georgia Marketplace website.) <ul style="list-style-type: none"> ○ No Vendor – Use for donated, loaned, and vehicle types not addressed by statewide contract. <ul style="list-style-type: none"> ▪ Enter the vendor name, address, and contact information. ○ Statewide Contract – Vehicle is being purchased from a statewide contract. <ul style="list-style-type: none"> ▪ Select the desired contract number from the drop down menu. ▪ Select the appropriate vendor name. • Vehicle Delivery Method – Select Pickup or Delivery.

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Step	Action
3.	Click Save. You have now completed the agency, requester and vendor information and can begin entering specific vehicle information for the vehicle request.
4.	<p>Vehicle Request Lines A vehicle request line must be completed for <u>each</u> vehicle requested even if the vehicles are of the same type. The instructions for quickly creating identical vehicle request lines is provided in Step 8.</p> <div data-bbox="492 558 1198 722" data-label="Image"> <p>The screenshot shows a web interface titled 'Vehicle Request Lines (0)'. A red box highlights the 'Add VR Line' button. Below the button, there are sections for 'Additional Info (0)' and 'Audit Details'. At the bottom, there are 'Save', 'Cancel VR', and 'Exit' buttons.</p> </div> <ul style="list-style-type: none"> • Click Add VR Line to begin entering vehicle information and Add New VR Line #1 section expands • Select VR Reason - Addition to Fleet or Replacement from drop down menu. <ul style="list-style-type: none"> ○ If Addition, complete the information below for the new vehicle: <ul style="list-style-type: none"> ▪ Enter the year, make, model, unit cost (cost for a single vehicle) ▪ Leased – Select Yes, if vehicle is leased; otherwise, select No ▪ Driver Assigned – Select Yes, if vehicle will be assigned to one driver and allowed to be taken home; Select No, if the vehicle will be pooled ▪ Fuel Type – Select type of fuel for vehicle from drop down list <p><i>Note: Please consider choosing an alternative fuel vehicle, if possible.</i></p> <div data-bbox="537 1100 1243 1377" data-label="Image"> <p>The screenshot shows the 'Add New VR Line #1' form. The 'VR Reason' dropdown is set to 'Addition to Fleet'. A red box highlights the 'New Vehicle Information' section, which includes fields for Year, Make, Model, Unit Cost, Leased (dropdown), Driver Assigned (dropdown), and Fuel Type (dropdown). 'Save VR Line' and 'Cancel' buttons are also visible.</p> </div> ○ If Replacement – Complete the information for the new vehicle and the information below for the vehicle to be replaced. <ul style="list-style-type: none"> ▪ Select Disposition Method – Lease Return, Other, sold to Insurance Company, Trade-In, Turn in to State Surplus ▪ Click binoculars to choose the state ID from the existing inventory <div data-bbox="537 1600 1300 1900" data-label="Image"> <p>The screenshot shows the 'Add New VR Line #1' form with the 'VR Reason' dropdown set to 'Replacement Vehicle'. A red box highlights the 'New Vehicle Information' section (Year, Make, Model, Unit Cost, Leased, Driver Assigned, Fuel Type) and the 'Vehicle to be Replaced' section (Disposition Method, State ID with binoculars icon, VIN, Current Odometer, Year, Make, Model). 'Save VR Line' and 'Cancel' buttons are also visible.</p> </div>

Creating Vehicle Requests (continued)

Step	Action												
5.	<p>Justification Questions</p> <p>Answer the following questions to provide justification.</p> <ul style="list-style-type: none"> If VR reason is an Addition, Questions 1 & 4 are required. If VR Reason is a Replacement, Question 1, 2, 3 & 4 are required. <div data-bbox="323 548 1362 1085" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="2" style="background-color: #4a7ebb; color: white; text-align: center;">Justification Questions</th> </tr> </thead> <tbody> <tr> <td style="width: 50%; padding: 5px;">1. Why do they need new/additional vehicle? How will new vehicle be used if different from one being replaced?*</td> <td style="width: 50%; padding: 5px;"><i>List purpose and rationale. For instance, additional staffing, new program, etc. If new vehicle is different type than previous vehicle, supply justification for difference.</i></td> </tr> <tr> <td style="padding: 5px;">2. How much have they spent on maintenance in the last fiscal year? (This is regardless of the number of miles on the vehicle.)</td> <td style="padding: 5px;"><i>Provide a total amount to include preventative maintenance, repairs, tires, etc</i></td> </tr> <tr> <td style="padding: 5px;">3. How is current vehicle used?</td> <td style="padding: 5px;"><i>For example for administrative support, law enforcement, etc</i></td> </tr> <tr> <td style="padding: 5px;">4. Explain any funding source other than state or federal funds.*</td> <td style="padding: 5px;"><i>Explain the source, if agency funds, provide specific department or category, any restrictions or requirements.</i></td> </tr> <tr> <td style="padding: 5px;">5. Additional information</td> <td style="padding: 5px;"><i>add any additional information</i></td> </tr> </tbody> </table> </div> <ul style="list-style-type: none"> Provide concise answers to the following questions. <ol style="list-style-type: none"> Why does your agency need the new/additional vehicle? How will the new vehicle be used if different from one being replaced?* How much have they spent on maintenance in the last fiscal year? (This is regardless of the number of miles on the vehicle.)* <ul style="list-style-type: none"> If vehicle is an addition to the fleet, enter N/A. Provide the best estimate for all PM, maintenance and repair costs for the last fiscal year for the vehicle to be replaced How is current vehicle used?* Explain any funding source other than state or federal funds.* <ul style="list-style-type: none"> If non-state funds, indicate the name of source for instance if federal grant provide the federal agency and/or grant name or tuition or student fees. Additional information. <ul style="list-style-type: none"> Provide any other information that you believe explains your need for the vehicle. 	Justification Questions		1. Why do they need new/additional vehicle? How will new vehicle be used if different from one being replaced?*	<i>List purpose and rationale. For instance, additional staffing, new program, etc. If new vehicle is different type than previous vehicle, supply justification for difference.</i>	2. How much have they spent on maintenance in the last fiscal year? (This is regardless of the number of miles on the vehicle.)	<i>Provide a total amount to include preventative maintenance, repairs, tires, etc</i>	3. How is current vehicle used?	<i>For example for administrative support, law enforcement, etc</i>	4. Explain any funding source other than state or federal funds.*	<i>Explain the source, if agency funds, provide specific department or category, any restrictions or requirements.</i>	5. Additional information	<i>add any additional information</i>
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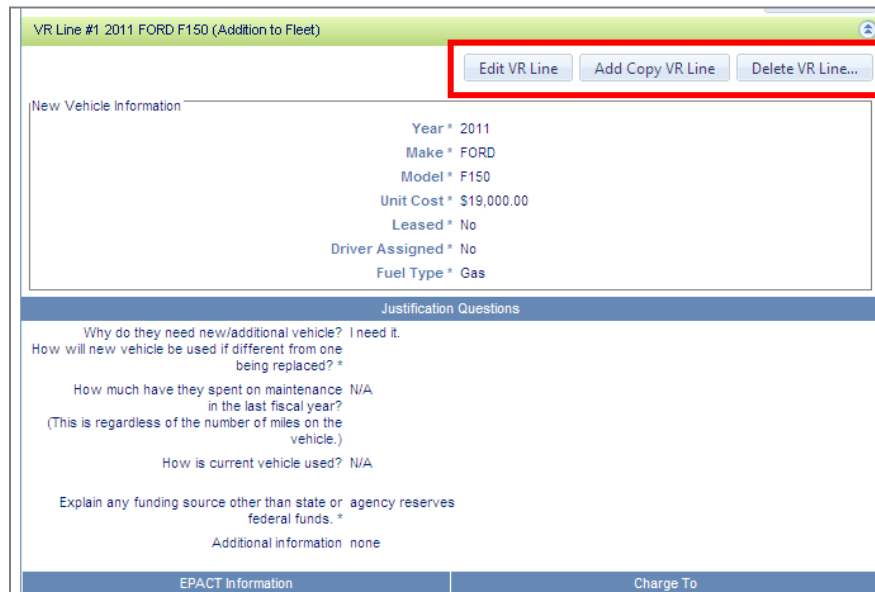
Creating Vehicle Requests (continued)

Step	Action
6.	<p>EPACT and Budget Information Provide the following information on the new vehicle.</p> <div data-bbox="493 453 1195 884" data-label="Form"> </div> <ul style="list-style-type: none"> • EPACT Primary Use – Select from the drop down menu. <ul style="list-style-type: none"> ○ Administrative ○ Daily or short term rental ○ Emergency/medical ○ Interstate/Intercity bus transportation ○ Law enforcement ○ Mixed Use ○ Off Road ○ Other (Please specify) ○ Overnight Use ○ Student Transportation ○ Transit ○ Utility • GVW – Select Under 8,500 or Over 8,500 • PO Number, PO Date, PO Line num – Do not enter at time of vehicle request. This information is entered after the vehicle request is approved ,and the vehicle is purchased. • Budget Fiscal Year • Source of Funds <ul style="list-style-type: none"> ○ If one source for funds, enter 100 in the desired field. ○ If split funding indicate the relevant percentage in each source field. • Program ID/Name – Obtain information from agency budget office <ul style="list-style-type: none"> ○ Enter program code or description. If you don't know the program ID but have a description or vice versa, you can enter partial information to return those programs that match the criteria.
7.	Click Save VR Line.

8. **Modify Vehicle Request**

Once one vehicle request line is created, the requestor can modify an existing vehicle request by editing a VR line, adding additional vehicle requests or deleting the VR Line.

- To add a new vehicle request with the same vendor but different vehicle information
 - Click **Add VR Line**
 - Repeat Steps 4-7 to add vehicles to the request
- To duplicate a vehicle request, including the vehicle, justification, EPACT and Charge To information for additional vehicles. (See graphic below)
 - Select the existing VR Line that you want duplicated.
 - Click Copy VR Line and all the information for the selected VR will be populated for a different VR line.
 - Once created, you can make changes to the new VR line once created by clicking Edit VR Line, Delete VR Line.
- To edit a VR Line
 - Click of the VR Line#
 - Click **Edit VR Line** and make desired modifications
- To delete a VR Line
 - Click **Delete VR Line** and all information for the VR Line is removed from the vehicle requests.



9. Once you have completed the vehicle requests and all lines, you can click:
- **Save** – saves changes made to the VR

- **Submit To Approve** – sends the vehicle request to next level approver
 - An email will be sent to the next level approver
- **Cancel VR** – ends the VR so that it cannot be edited or approved
- **Exit** – closes the **Vehicle Request Form** window and opens the **Search Vehicle Requests** window that contains the vehicle requests in your inbox.

10. To monitor the VR through the approval process:
- Click on the **Vehicle Requests Search Menu**
 - The vehicle request should be listed in the second half of the window. If not, in the **Status** box, select **All Statuses** and all vehicle requests for your agency should be listed.
 - The listing the vehicle request can be sorted like other listing pages in VITAL Insights by clicking on the column heading (click once for ascending order, click twice for descending order).

Requested	VR #	Agency	Status	Description	Total Cost
11/17/2010	4030-1000488	4030-Administrative Services, Department of	Approved	add copy	\$1.00
11/17/2010	4030-1000480	4030-Administrative Services, Department of	Approved	OFM TEST	\$21,000.00
11/16/2010	4030-1000474	4030-Administrative Services, Department of	VR Waiting OFM Review	Replacement Vehicle Test	\$19,000.00
11/16/2010	4032-1000472	4032-Americus Surplus	Waiting for Requestor Addl Data	Allyson's test	\$38,000.00
11/05/2010	4280-1034	4280-Community Affairs, Department of	VR Waiting OFM Review	2011 Chevrolet Impala Administration	\$51,815.00