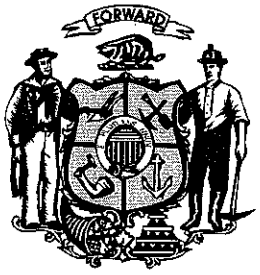
State of Wisconsin

Fleet Driver and Management Policies and Procedures

Manual



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Executive Summary

This manual combines into a single document the policies and procedures previously published separately as the Fleet Drivers Policies and the Fleet Management Policies. The Department of Administration (DOA) has chosen to consolidate the policies to (1) align more closely the use and management of State vehicles, (2) eliminate confusion between previous versions, (3) increase employee and public understanding of the overall state fleet program and (4) provide for greater accountability of fleet policies.

The following overview provides a general sense of the state fleet policies. However, the reader should thoroughly read Chapters One (fleet drivers) and Two (fleet managers) of the manual for a clear understanding of enforceable policies.

Fleet Driver

- Only state employees, authorized University of Wisconsin System students and other authorized agents of the state may drive a state vehicle. All drivers must meet minimum standards and execute an approved Vehicle Use Agreement.
- Authorization to drive a state vehicle may be denied or revoked if the employee, student or agent's driving record reflects certain violations.
- Use of a state vehicle must be for official state business only. Incidental use associated with official business is strictly limited.
- State vehicles shall not be used for personal purposes except commuting under strictly limited circumstances.
- An employee must reimburse the state for personal miles traveled and adhere to all IRS reporting requirements.
- Non-state employees may ride in a state vehicle only if authorized and on official state business.
- Drivers and passengers must comply with all Wisconsin laws. Drivers are responsible for paying all vehicle citations.
- Employees should use a state vehicle whenever a vehicle is required and available for conducting state business. State vehicles are categorized as personally assigned, work shared, motor pool and qualified non-personal use vehicles.
- Drivers are responsible for immediately reporting all accidents or any damage to state vehicles.

Fleet Management

- DOA is responsible for developing uniform state policies for vehicle acquisition, use and maintenance.
- State agencies must adhere to DOA policies. Any deviations must be authorized in writing by the DOA Secretary.
- All driving records of employees with active Vehicle Use Agreements will be reviewed annually. Agencies may void agreements of any employee that fails to meet minimum driving standards.
- Fleet managers/coordinators are mandated to monitor the assignment and use of vehicles by all agency employees on a semi-annual basis (or more frequently if necessary) and submit a complete report to the DOA Secretary.
- Fleet managers will develop and maintain a preventative maintenance program and procedures for unscheduled maintenance.
- All state vehicles are required to have red state-owned license plates (with the exception of vehicles authorized by DOA; for instance, undercover law enforcement).
- All agencies are required to report their vehicle information in the FleetAnywhere database.

Preface

Authority

The Fleet Drivers and Management Policies and Procedures Manual is based on the collection of statutes, administrative codes, memoranda and collective bargaining agreements that govern the use of state vehicles. DOA approved and issued this Fleet Drivers and Management Policies and Procedures Manual to control the use of all state vehicles. Fleet policies reflect minimum requirements that state agencies and drivers must abide by to use vehicles owned by the State of Wisconsin.

This manual provides drivers with the basic regulatory requirements for operating a vehicle owned by the State of Wisconsin. It also provides agencies with the basic regulatory requirements for managing a vehicle owned by the State of Wisconsin.

It is each driver's responsibility to obtain supervisory approval to travel. Authority to travel—both in state and out-of-state—is regulated. Statutes authorizing employees to travel for state business are contained in Chapters 16 and 20, Wisconsin Statutes. A number of collective bargaining agreements also contain provisions relating to travel and state vehicle usage. Drivers should consult with fleet managers regarding those provisions.

Likewise, the laws granting state government the authority to own and operate a fleet of vehicles are contained in Wisconsin Statutes and Administrative Codes. The following statutes and rules are among those that govern the use and management of the State fleet:

s. 11.37	Travel by public officers
s. 16.003(1)	Department of Administration-Purpose (Enterprise Fleet Management)
s. 16.04	Fleet management and maintenance
s. 16.045	Storage and use of gasohol and alternative fuels
s. 16.70(le)	Definition of "agency"
s. 16.70(2)	Definition of "authority"
s. 20.505(2)(k)	Risk management (State Self-funded Property and Liability Program)
s. 20.915	State motor vehicles and aircraft
s. 20.916	Traveling expenses (Uniform Travel Schedule Amounts governed by this statute)
s. 20.916(4)	Use of privately owned automobiles
s. 20.916(7)	Personal use of state vehicles and aircraft
s. 20.916(8)	Uniform travel schedule amounts; allowances
s. 20.916(9)	Reimbursement for travel expenses
c. 102	Conditions of liability
s.340.01(41g)	Operator's license
s. 341.14(3)	Private plates for law enforcement vehicles
s. 893.82	Claims against state employees; notice of claim; limitation of damages
s. 895.46	State and political subdivisions thereof to pay judgements taken against officers

Definitions of Terms

Agency: State departments, boards, commissions, institutions, and University campuses, except agency heads.

Agency Dispatcher: The agency employee who reserves and issues pool vehicles.

Agency Fleet Coordinator: The employee in a state agency who manages vehicles leased from DOA. Agencies that lease vehicles instead of owning them have a Fleet Coordinator instead of a Fleet Manager.

Agency Fleet Manager: The employee who manages an agency's owned vehicle assets.

Agency Head: The head of a department (secretary), board (chairperson), commission (commissioner), or university campus (chancellor). Agency heads may delegate their duties to an appropriate agency employee. Delegation of duties must be documented and a copy filed with the DOA Bureau of Enterprise Fleet Director.

Agency Risk Manager: A state employee whose responsibilities involve administering the agency's risk management program.

Agency Supervisor: An agency employee who monitors the driver's compliance regarding mileage reports, fuel usage and maintenance issues and reports to the agency fleet manager/coordinator.

ADA: Americans with Disabilities Act

Authority: Wisconsin state agency with administrative powers regarding enforcement of policy compliance by other state agencies. DOA has authority over fleet driver fleet management policies.

BSRM: DOA Bureau of State Risk Management.

Business Miles: Miles driven in state vehicles by state employees, while performing official state business.

Commuting: Direct travel from home to headquarters or headquarters to home.

DOA: Department of Administration

DUI: Driving Under the Influence of an intoxicant, controlled substance or other drug.

Employing Agency: The board, commission, committee, council, university campus, or department in state government that appointed an employee to the employee's current state position (or the employee's position at the time in question).

Headquarters City: The area within the city, town or village limits where an employee's permanent work site is located and the area within a radius of 15 miles (based on odometer mileage) from the employee's permanent work site.

Home: The employee's place of residence.

Incidental Use: Typically occurs while enroute on official business. Stops at an ATM or financial institutions or for lunch would qualify as incidental use and are not considered personal miles if in work status and do not require reimbursement. Incidental use may also occur during commuting when personal miles are to be reimbursed. During commuting, mileage for incidental use must be reimbursed.

IRS: U.S. Internal Revenue Service

Motor Pool: Motor pool vehicles are available to all employees without regard to funding source, and are billed back on a daily use basis to the appropriate funding source.

Non-availability Slips: Written authorization to use an employee's private vehicle at the reimbursement rate stated in the current UTSA.

On-Call: Generally, when the Employer requires that an employee must be available for work and able to report for work in less than one hour. Definition of "on-call" may vary between collective bargaining agreements/Compensation Plan and may also be called "standby."

Operator's License: Defined in s. 340.01(41g), Wis. Stats.

OSER: Office of State Employment Relations

OWI: Operating While Intoxicated, i.e., under the influence of an intoxicant, controlled substance or other drug.

Owner Agency: The board, commission, committee, council, university campus, or department in state government that owns the vehicle.

Personal Miles: Miles driven in a state vehicle that are not business-related. Commuting is an example of personal miles.

Personally Assigned Vehicle: A state vehicle assigned to an individual state employee for business use.

Pool Vehicle: A work shared vehicle available for business use through reservation.

Qualified Non-Personal Use Vehicle: Those vehicles used primarily by law enforcement or fire fighting personnel. See Chapter One, 1.23., for a complete definition.

Reimbursement rate: The rates at which an employee may be reimbursed for use of a personal vehicle for state business, or the rate at which an employee is required to reimburse the State for personal miles in a state vehicle. For rates, please refer to the current UTSA. If an employee exercises the option to use a personal vehicle when an assigned or pool vehicle is available, the reimbursement rate is set in accordance with s. 20.916(4)(e), Wis. Stats., unless provided otherwise in the UTSA.

SBOP: DOA State Bureau of Procurement

State Vehicle: A vehicle owned by the State of Wisconsin for use to conduct official state business. A state vehicle also includes a commercially leased or rented vehicle that is assigned to an individual, agency or business sub unit for use to conduct official state business.

UTSA: The most recent Uniform Travel Schedule Amount (UTSA) set by OSER with approval by the legislative Joint Committee on Employment Relations. UTSAs are found in the Compensation Plan.

Vehicle Assignment Transfer (VAT): An authorization to change vehicle assignment status.

Vehicle Use Agreement (VUA): An agreement signed by a driver of state vehicles and his/her supervisor indicating the employee is eligible to drive a state vehicle.

Work Shared Vehicle: A state vehicle assigned to an agency or an agency sub-unit for business use.

Chapter One: Fleet Driver Policies

Who May Drive a State Vehicle

1.1. Minimum Standards for Driving a State Vehicle

Only state employees, authorized University of Wisconsin System students and other authorized agents of the state who sign a Vehicle Use Agreement (VUA) may drive state vehicles. They may only use state vehicles if they are on official state business, meet minimum driving standards and are authorized by their agency risk manager. Approval will be documented and kept on file at the state agency risk management office. If the agency does not have a risk manager, the request for authorization should be submitted from the agency head of the employing agency to the BSRM for approval.

State employees, authorized University of Wisconsin System students and other authorized agents of the state may be allowed to drive a state vehicle if the following minimum standards are met and approved by their employing agency:

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

Agency fleet managers/coordinators should consult with their agency risk managers regarding any requests for an exception to the minimum standards. Approval will be documented and kept on file at the state agency risk management office. If the agency does not have a risk manager, the request for exception should be submitted from the agency head of the employing agency to the BSRM for approval. Drivers denied the use of a state vehicle based on an unsatisfactory driving record may request a review of the denial by their agency head.

1.2. Vehicle Use Agreements

All drivers must sign a Vehicle Use Agreement (VUA), DOA-3103 or equivalent (Appendix I) and submit the completed VUA to their supervisor for approval prior to operating a state vehicle. The VUA shall be reviewed and forwarded by the agency fleet manager/coordinator to the owner agency. The VUA describes the State's minimum standards for driving a state vehicle. All drivers who use state vehicles will have their driving records reviewed annually. It is the driver's responsibility to immediately notify the supervisor and agency fleet manager/coordinator of any changes or updates in their driving record.

Prior to driving a state vehicle, each driver shall obtain a copy of and become thoroughly familiar with the Preface and Chapter One of the Fleet Driver and Management Policies and Procedures Manual. Once drivers sign the VUA, or equivalent, they acknowledge an understanding of and future compliance with the directives in this manual. Any failure to comply with the Fleet Driver Policies and Procedures will be reviewed by the driver's supervisor and may be considered a violation of work rules resulting in a loss of state vehicle driving privileges and possible discipline, up to and including discharge. Any questions should be directed to the driver's agency fleet manager.

1.3. Driver Disqualification

State employees, authorized University of Wisconsin System students and other authorized agents of the state may not drive a state vehicle if their driving record reflects any of the following conditions:

- Three or more moving violations and/or at-fault accidents in the past two years
- An Operating While Intoxicated (OWI)/Driving Under the Influence (DUI) citation within 12 months
- Suspension or revocation of driver's license

The violation occurs when the citation is issued, not when the final court decision is made. Exceptions to this policy are subject to a review. Agency fleet managers/coordinators should consult with their agency risk managers regarding any requests for an exception. Approval will be documented and kept on file at the state agency risk management office. If the agency does not have a risk manager, the request for exception should be submitted from the agency head of the employing agency to the BSRM for approval. Drivers denied the use of a state vehicle based on an unsatisfactory driving record may request a review of the denial by their agency head.

Drivers must inform their supervisor and agency fleet manager/coordinator in writing whenever they become disqualified under these policies. Changes include, but are not limited to, OWI/DUI citation, license revocation, restriction or suspension. Any change in the status of a driver's record resulting in disqualification or the failure to report such change may result in revocation of the privilege of driving a state vehicle and/or discipline up to and including discharge.

1.4. Special Certifications

Depending upon the type of vehicle driven, special training and/or licensing may be required prior to vehicle use. For example, training is required for driver certification for the operation of twelve and 15 passenger vans. Commercial Drivers Licenses (CDL) are also required for certain state positions (see Chapter One, 1.5.). Drivers should consult with the agency fleet manager, risk manager or BSRM to determine eligibility.

1.5. Commercial Driver License (CDL) Requirements

Under s. 340.01, Wis. Stats., a commercial driver's license is required to operate certain commercial motor vehicles (CMV). The following CMV and CDL guide is provided by the Wisconsin Department of Transportation (WisDOT):

- A combination vehicle 26,001 or more pounds is a Class "A" CMV only if the trailer being towed has a gross vehicle weight rated, registered weight or actual gross weight of more than 10,000 pounds.
- When the weight of the combination vehicle is exactly 26,000 pounds, it is not a CMV and does not require a CDL. Example: A tractor weights 16,000 pounds and the towed unit weighs 10,000 pounds.
- When the towing vehicle is 26,000 or less pounds and the towed unit is 10,000 or less pounds, it is not a CMV and does not require a CDL. Example: A tractor weighs 25,500 pounds and the towed unit weighs 8,000 pounds.
- A CDL with an "N" tank vehicle endorsement is required only when the capacity of the tank is 1,000 gallons or more and the vehicle fits the description of a CMV.
- A CDL with a "P" passenger endorsement is required when the vehicle is designed to transport or is actually transporting the driver and 15 or more passengers.

A driver with a CDL hired by the State must be drug tested prior to driving a state CMV and may be subject to random testing. A driver receiving a CDL after employment is required to be drug tested prior to driving a state CMV.

The driver is responsible to ensure that the vehicle meets State and Federal regulations regarding permits, safety devices, equipment (e.g., pre-trip inspections) and loads prior to operating vehicle. The driver must also comply with all applicable State and Federal regulations.

Using a State Vehicle

1.6. Permitted and Prohibited Uses

The following policies govern state vehicles and do not include the policies of the State Vanpool Program. DOA mandates the following when utilizing a state vehicle:

- Use of a state vehicle must be for official state business only. Incidental use associated with official business away from the employee's headquarters city is strictly limited and may include incidental travel mileage (see Chapter One, 1.9., Incidental Travel and Stops).
- A work-shared vehicle may only be used for business miles and associated incidental travel and the guidance provided under Chapter One, 1.10.
- All drivers and passengers in state vehicles must comply with all Wisconsin laws, including the Wisconsin seat belt law.
- Drivers and/or their agency are personally responsible for the cost of all traffic citations, parking tickets, locksmith calls for retrieving keys, etc.
- Drivers are responsible for compliance with IRS and Wisconsin Department of Revenue requirements that are related to mileage reimbursement and personal use of a state vehicle.

Compliance with state vehicle use policies is required of all drivers and passengers. No person may use a state vehicle, or permit the use of a state vehicle, in the following prohibited manners:

- Reckless driving or speeding
- The driver is impaired by fatigue, alcohol, drugs or any other condition
  - Any such vehicle use will be considered a violation of Fleet Driver and Management Policies and Procedures and may be grounds for disciplinary action up to and including discharge.
  - Drivers of state vehicle who feel that their driving abilities may be impaired must cease operating the vehicle immediately. Employees who believe another employee is impaired have a duty to prevent that person from driving a state vehicle.
- Smoking is prohibited in state vehicles
- Transporting non-state employee passengers, including family members, is not permitted unless authorized under Chapter One, 1.12, Riding in a State Vehicle.
- Use for personal gain, such as delivering goods or services
- Modifications including affixing signs, stickers, antennas, bike racks, ski racks, etc.
  - Modifications to state vehicles may be undertaken only with the prior written consent of the owner agency fleet manager.
- Transporting animals
  - Allowed only with prior written consent of the owner agency fleet manager.
- Hauling loads that could structurally damage the vehicle (e.g., firewood, paper, gravel)
- Use of trailer hitches and towing
  - Allowed only with prior written consent of the owner agency fleet manager
- Installation or use of any radar-detection devices
- Transporting hitchhikers
- Bicycles transported inside vehicles
- Use for vacations or any other use not expressly authorized by this manual

Drivers who have questions regarding the appropriate use of a state vehicle should consult with their agency fleet manager.

1.7. Personal Use of State Vehicles

With the exception of commuting, state vehicles shall not be used for personal purposes. State vehicles may be used for commuting under the following circumstances only:

- The agency requires the employee to commute in the state vehicle for valid business needs of the agency, and
- The agency requires the employee to use the state vehicle; the employee may not volunteer to use the state vehicle.

Work shared and pool vehicles may not be used for commuting unless required by the employer. Further, work shared or motor pool vehicles are to be parked at the agency when not being used by an employee.

1.8. Political Use of State Vehicles and Aircraft

Section 11.37(1) and (2), Wis. Stats., state the following:

(1) No person may use any vehicle or aircraft owned by the state or by any local governmental unit for any trip which is exclusively for the purposes of campaigning in support of or in opposition to any candidate for national, state or local office, unless use of the vehicle or aircraft is required for purposes of security protection provided by the state or local governmental unit.

(2) No person may use any vehicle or aircraft owned by the state or by any local governmental unit for purposes which include campaigning in support of or in opposition to any candidate for national, state or local office, unless the person pays to the state or local governmental unit a fee which is comparable to the commercial market rate for the use of a similar vehicle or aircraft and for any services provided by the state or local governmental unit to operate the vehicle or aircraft. If a trip is made in part for a public purpose and in part for the purpose of campaigning, the person shall pay for the portion of the trip attributable to campaigning, but in no case less than 50% of the cost of the trip. The portion of the trip attributable to campaigning shall be determined by dividing the number of appearances made for campaign purposes by the total number of appearances. Fees payable to the state shall be prescribed by the secretary of administration and shall be deposited in the account under s. 20.855 (6) (h). Fees payable to a local governmental unit shall be prescribed by the governing body of the governmental unit.

1.9. Incidental Travel and Stops

Drivers are not permitted to use a state vehicle for a personal purpose. The only exceptions to this rule are incidental stops. Examples are stops at a restaurant for a meal, an Automatic Teller Machine (ATM) or financial institution, urgent care or emergency room or a gas station or convenience store.

Drivers should remember that public perception of state employees is important and influenced by how and where the public sees state vehicles being used. Drivers should not make incidental stops at locations the public would perceive as inappropriate. Examples are gaming and sports venues, liquor outlets and other locations where it is unlikely that any state business or allowable incidental use is involved.

Drivers required to stay overnight(s) away from home may, with permission of their supervisor, use a state vehicle for the types of necessary activity that could be expected of a traveler away from home. Examples include evening use to go to a pharmacy, grocery, laundromat, fitness center, or other locations to purchase goods or conduct activities necessary for the employee's health and well being.

1.10. Reimbursing Personal Miles to the State

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 unless the employee reimburses the State for the full value of the personal mileage based on the IRS Valuation rules. The value of the fringe benefit must be included in the employee's wages and is subject to income and employment taxes. No additional employee wages will need to be calculated if the employee reimburses the State for the value of the benefit, derived in accordance with the appropriate IRS rule.

Per the IRS, if a vehicle is generally taken home more than once a month, the employee is required to reimburse the state for personal miles traveled. This section applies to motor pool, work share, rental and personally assigned vehicles. IRS examples include:

- A state owned pickup truck has the name of the state marked on the vehicle. Usually the employee is allowed to take the vehicle home because he/she is "on call." The vehicle is not a qualified non-personal use vehicle, thus the commuting is a non-cash taxable fringe benefit.

- An employee takes a state vehicle home in order to avoid exposing it to harm. The vehicle has a state seal on the door and is not to be used for personal use. If the vehicle is not a qualified non-personal use vehicle, the employee would have a taxable commuting benefit if he/she takes a state vehicle home.

- An employee uses a motor pool vehicle for a business meeting. The employer requires that motor pool vehicles are returned at the end of the business day but the employee is delayed and motor pool is closed when the employee arrives back at the office. The employee takes the vehicle home and returns it the next morning. Is the commute home and back to the office the next morning taxable to the employee? Per IRS: Assuming that this is an infrequent occurrence for that employee, that is, generally happens no more than once a month, the commuting value of the trip would be considered a non-taxable de minimis fringe benefit. If not an infrequent occurrence, the commute would be taxable to the employee.

Reimbursable personal miles are determined as follows:

- Actual miles driven between an employee's home and headquarters are considered commuting miles, or,
- For trips that start or end at an employee's home, the lesser of actual miles driven between an employee's home and the work site removed from the assigned headquarters or the mileage between an employee's assigned headquarters and the work site, are considered business miles. Any miles driven in excess of this amount would be considered personal miles that need to be reimbursed to the state.

The operator of the vehicle is required to keep track of all business miles by keeping an Assigned Vehicle Log (Appendix IV) on a daily basis containing the information described below. Any undocumented mileage will be considered personal miles and considered compensation provided to the employee. Unless otherwise authorized, all personal mile reimbursements must be submitted along with the monthly mileage report to the vehicle owner agency. Reimbursement to the State shall be calculated using one of the following two valuation rules:

1. **Vehicle Commuting Rule**: This method applies only to the employee who is required to commute in the vehicle for valid business reasons and the employee is not compensated for such use. The following method is used to calculate reimbursement to the State:

   - Qualifying Employees must reimburse the State at the greater of $1.50 per state employee each way of the commute or $0.325 per mile plus appropriate tax.
   - Example: John has a personally assigned vehicle which he drives 20 miles each way to his headquarters in Madison. 20 miles x $0.325 x 2 ways = $13.00 plus tax which John must reimburse to the State.

2. **Automobile Lease Value Rule**: This method applies to all elected officials or state employees whose compensation rate is at least as great as federal government employees at Executive Level V ($128,200 in 2004) or to any employee whose use of the vehicle does not qualify under the vehicle commute rule. The following method is used to calculate reimbursement to the State:

   - Determine the Annual Lease value of the vehicle as shown in IRS Publication 15-B.
   - Multiply the vehicle's annual lease value by the percentage of non-business use of the vehicle.
   - Add the value of fuel, if provided by the employer, per non-business miles traveled. Value of fuel (if provided) is at $0.055 per mile.
   - Example: The annual lease value of the vehicle is $3,000. Jane put 2,000 non-business miles on the vehicle during the year, which equals 20% of the total miles put on the vehicle. The value of non-business miles under the "lease value rule" is 20% of $3,000, or $600. The value of fuel for 2000 non-business miles is $110.00. The total lease value of the non-business mileage is $710.00.
   - Employees subject to this rule shall make monthly payments for personal miles at $0.325 per mile. By January 10 of each year, the employing agency shall calculate the annual value of personal use as described above. If the annual value of personal use under the Lease Value Rule is higher than the sum of monthly payments made during the year, the employee must submit the difference to the owner agency along with a copy of the calculation of value.
   - Example: Jane reimbursed the State for 2000 miles at $0.325 per mile during 2004, for a total of $650.00. Assuming that the annual value under the "lease value rule" is $710.00, Jane must submit $60.00 ($710.00 minus $650.00) to the State.

IRS Liability: If an employee utilizes a state vehicle for personal use, including commuting, and the personal use of the vehicle is not reimbursed to the State, the value of any non-reimbursed personal use is considered a taxable fringe benefit. This rule does not apply to a qualified non-personal use state vehicle as long as the employee is complying with the assignment requirements. Under strictly limited circumstances, there may be exceptions to this rule. For example, an agency requires that the motor pool vehicle is returned at the end of the business day, but the employee is delayed and the motor pool is closed when the employee arrives back at the office. The employee takes the vehicle home and returns it the next morning. Assuming that this is an infrequent occurrence for that employee, that is, generally happens no more than once a month, the employee would not be required to reimburse the state for these miles. If the employee frequently experiences circumstances of this nature, the employee must reimburse the State for the commuting miles.

1.11. Mileage Reporting

Monthly mileage reporting is required for every state vehicle. The driver is required to submit two documents when recording and reporting monthly mileage. Drivers are required to maintain an Assigned Vehicle Log form, DOA 3472 (Appendix IV) or equivalent, which records each leg of daily travel. Vehicle logs must be submitted to and maintained by the fleet coordinator. At the end of every month, the driver responsible for the vehicle is to return a completed Mileage Report (envelope), DOA-3223 or equivalent, (Appendix IX) to the owner agency. The mileage report indicates the beginning and ending

odometer readings for the vehicle along with any personal mileage. Reimbursement for any personal miles must be included with Mileage Report. A supervisor signature is required on all Mileage Reports.

If reporting personal/commute miles, a personal check including tax (state, county, and/or local taxes, if applicable) must be submitted according to owner/agency procedures. The tax rate is based on the employee's county of residence. Vehicle reassignment may occur if monthly mileage reports are late or missing three times in a twelve-month period.

1.12. Riding in a State Vehicle

Non-state employees may ride in a state vehicle if on official state business and authorized by their agency risk manager. Approval will be documented and kept on file at the state agency risk management office. If the agency does not have a risk manager, the agency head of the employing agency should submit a request for authorization to the BSRM for approval.

1.13. Extended Use

Due to the composition and size of some agency fleets and the need to adequately accommodate all customers, there are limits to the length of time a driver may have a pool vehicle in their possession. Generally, a driver may reserve pool vehicle for no longer than two weeks. Please contact the agency fleet manager for more information.

1.14. Citations

Drivers are responsible for promptly paying all vehicle citations. Failure to pay parking tickets immediately results in late fees and possible vehicle registration revocation or suspension. The owner agency will pay the amount due upon notice and invoice the driver and their employing agency, which may include extra charges. The responsible driver may be subject to discipline, as determined by the employing agency.

1.15. Motor Pool Service Charges

Services charges only apply to pool vehicles. Charges may occur if there is:

- Failure to cancel a reservation
- Failure to pick up a vehicle on the day that it is reserved
- Failure to return a vehicle on the designated return date (charge will be waived if prior approval for an extension is granted by an agency fleet manager)

Drivers should contact agency fleet manager with questions regarding rates and timelines.

1.16. State Vehicle Related Purchases

Drivers of state vehicles are strongly advised to find out from their agency fleet manager, fleet coordinator, or procurement manager which automotive service vendors and gas stations to use. The driver should be aware that purchase card (p-card) use is not allowed for fleet expenses. Fuel or other supplies and services needed to operate a state vehicle are primarily acquired through state contracts. These contracts include goods and services available throughout the state, as well as supplies and services

contracts in particular geographic areas. Some contracts for supplies are only available for use by specific agencies. In other instances, different vendors might be available under a single contract.

1.17. Vehicle Fuel Policies and Fuel Card Uses

State-owned gasoline dispensers should be used whenever possible. Agency fleet managers/coordinators must provide written directions to these locations and instruct their assigned drivers on the use of these dispensers.

Public self-service, regular unleaded dispensers should be used if state dispensers are not available. The most cost-effective vendor must also be used. The driver of the vehicle must be trained how to use the fleet fuel card found in the vehicle when operating a self-service dispenser. Use of Driver ID (PIN) and accurately recorded odometer readings are required to use these dispensers.

Fuel cards may not be used for the purchase of non-vehicle items such as food. If an attendant error occurs and non-vehicle items are charged to the fuel card, it is the responsibility of the driver to notify and reimburse the owner agency. Fleet managers are responsible for reviewing fuel card charges and identifying non-qualified purchases. Failure to reimburse for such purchases may result in the loss of driving privileges.

The driver should also be aware that there are cost limits related to vehicle services and an agency fleet manager must approve purchases above established limits. For example, vehicle wash rates for personally assigned and work shared state vehicles are calculated on a yearly basis and drivers seeking vehicle washes exceeding the maximum allowable cost must receive approval from their fleet manager. Drivers will be billed for any amount in excess of the set rate. Wash frequency is also limited to once a week during the period November through March (winter months), if needed, and limited to two times per month from April through October. Washes and other vehicle services will be reviewed. Drivers with excessive wash frequency will be notified. Detailing of a vehicle must be done at the leasing agency's expense and with the leasing agency approval. Typically, detailing occurs if the vehicle has been used to haul dirty or odorous materials or has been used off-road.

The State contracts with a fuel card vendor that issues credit cards and has established a transaction processing, reporting and payment system with respect to purchases of motor fuels and vehicle related purchases. Often, such fuel card vendors offer to process and pay for a variety of fleet related purchases at the point of sale. State policy restricts the use of the fuel card to purchase fuel, motor oil products, and related automotive consumables. Drivers are advised to verify which purchases are permitted with the fuel card prior to use.

The purchase of personal items such as food, beverages and air fresheners with a state fuel card, as well as automotive products for personal use, is strictly prohibited. Disciplinary action may be taken for improper use of a state fuel card. If an inappropriate charge occurs, the driver is responsible for reimbursing the State for the full amount of the inappropriate purchase. For additional information or clarification of fuel card use, drivers should contact their agency fleet manager/coordinator.

1.18. Repairs, Preventive Maintenance and Recalls

It is the driver's or work shared vehicle coordinator's responsibility to ensure that all preventative maintenance is performed on schedule and have the vehicle serviced in a timely manner when notified of a recall or preventive maintenance. Failure to perform the maintenance and repairs in accordance with agency policy may result in loss of the vehicle or, in the event of damage to the vehicle, payment for vehicle repair.

If a state owned repair shop does not provide maintenance on the state vehicle, a statewide mandatory contract for maintenance services must be used. In addition, the vehicle's owner agency may have special procedures to follow for emergency repairs. Consult the owner agency's procedures on repairs and preventive maintenance, including tires and glass breakage.

The following types of services are available through mandatory statewide contracts for fleet related items. Consult the owner agency's procedures on making purchases from the mandatory state contracts.

- Tires: new, retread, service
- Auto, light truck: maintenance and repair
- Towing and storage
- Fleet maintenance referral
- Vehicle lease - 30 or more days
- Rental passenger vehicles - In state
- Rental passenger vehicles - Out of state
- Glass repair or replacement

All drivers of state vehicles must know how to handle unscheduled emergency repairs. Instructions should be in the information/incident kit found in the state vehicle. If not available, contact the vehicle's owner agency to obtain a copy.

Vehicle Assignments

1.19. Vehicle Assignment Regulations

Employees should use a state vehicle whenever a vehicle is required and available for conducting official state business. The four categories of state vehicles are personally assigned, work shared, motor pool and qualified non-personal use vehicles. All restrictions relating to alcohol and drug consumption while using a state vehicle are strictly enforced under all categories of assignments.

All assignments will be approved or denied through the Vehicle Assignment Transfer (VAT) form, DOA-3102 or equivalent (Appendix III). A VAT requesting personal assignment of a vehicle must be signed by the requesting agency head. The VAT must be submitted to the owner agency with a copy to the DOA Bureau of Enterprise Fleet Director for approval.

Special Needs Accommodation: State employees who, for health reasons, require a larger automobile or special equipment must forward a doctor's statement to the agency's ADA or Human Resources Coordinator. The agency's ADA or Human Resources Coordinator must review with their agency fleet manager the means to accommodate the need, and send an approval letter to the owner agency, if applicable.

1.20. Personally Assigned Vehicles

An employee may be assigned an owned or leased state vehicle based upon job responsibilities, an approved driving record and whether there is a critical business need. Personal assignment of vehicles to individuals may be on an annual basis when not in conflict with collective bargaining agreements. Agency heads will monitor the assignment and use of vehicles by all their employees and vehicles may be reallocated from personally assigned status to work shared status at any time based on agency needs, subject to applicable provisions included in collective bargaining agreements.

The following guidelines are used to determine personal assignments and may be refined to meet the needs of the agency:

- Employee must need to use the vehicle for official state business 5-7 days per work week
- Vehicle requires special equipment not installable or transportable in a personal vehicle or making a state vehicle unsuitable for general use (e.g., law enforcement radios, sirens, lights)
- Employee is not headquartered near a motor pool or where a work shared vehicle is available
- Employee is required to be on-call

When an employee with a personal vehicle assignment is on leave or no longer works for the agency, the vehicle should be made available to other agency employees for state business travel or returned to the owner agency.

1.21. Work Shared Vehicles

Work shared vehicles are assigned among a group of state employees usually within a single funding source or an unrestricted funding source.

A work shared vehicle may not be used for personal travel such as commuting. A work shared vehicle may be taken home by a driver with prior approval by a supervisor if the employee is required to take the vehicle home for valid business needs of the agency. If a work shared vehicle is taken home more than once a month, the employee is required to reimburse the State for personal miles traveled. If a driver detects a problem with the vehicle or the vehicle is in need of maintenance, the driver must report the problem to the vehicle coordinator.

Upon learning of potential problems or abuse, owner or employing agency fleet staff shall investigate the situation. Based on the facts of the case, vehicle use privileges may be revoked or restricted, or individuals may be subject to discipline as determined by the vehicle owner agency or the employer agency.

1.22. Motor Pool Vehicles

Motor pool vehicles are made available to all employees without regard to funding source and are billed back on a daily use basis to the appropriate funding source. If the employee needs to take a pool vehicle home overnight or on the weekend when the fleet office is not open for business, written authorization from a supervisor is required. If a driver detects a problem with the vehicle or the vehicle is in need of maintenance, the driver must report the problem to the vehicle coordinator.

1.23. Qualified Non-Personal Use Vehicles

A limited number of state vehicles may be determined to be qualified non-personal use vehicles. Drivers of these vehicles are not required to reimburse the State for personal commuting miles. The agency head must identify the job classifications recommended to be designated as drivers of qualified non-personal use vehicles and a request submitted in writing to the DOA Secretary. A qualified non-personal use vehicle generally includes all of the following:

- Police or fire vehicles
  - Vehicle is clearly identified and obvious
  - A license plate designating the vehicle as a police or fire vehicle is not sufficient designation
  - The employee must always be on call
  - Employee must be required by agency to use the vehicle for commuting

  - Employer must prohibit personal use other than commuting for travel outside of the officer or fire fighter's jurisdiction
- Unmarked law enforcement vehicles
  - Agency must officially authorize personal use in writing such as commuting for law enforcement purposes
  - Employing agency must be a governmental unit responsible for prevention or investigation of crime
  - Vehicle must be used by a full-time law enforcement officer, (e.g., officer authorized to carry firearms, execute warrants and make arrests)
- An ambulance or hearse used for its specific purpose
- Any vehicle designed to carry cargo with a loaded gross vehicle weight over 14,000 pounds
- Delivery trucks with seating for the driver only, or the driver plus a folding jump seat
- A passenger bus with a capacity of at least 20 passengers used for its specific purpose
- School buses
- Specialized utility repair truck
  - Truck (not van or pickup) designed to carry tools, equipment, etc.
  - Permanent interior construction, shelves, racks required.
  - Employer must require employee to commute for emergency call-outs to restore or maintain power services, i.e., gas, water, sewer.

1.24. Privately Owned Vehicles Used In State Business

Privately owned vehicles may be used for official state business, but drivers are encouraged to use state vehicles whenever feasible. The reimbursement rates and rules for use of an employee's personal vehicle are defined in the UTSA.

If an employee desires to use a state vehicle and one is not available at the employee's agency fleet, they may contact the DOA Fleet (Madison area only). Non-availability slips will be issued if there are no state vehicles available at the employee agency fleet and the DOA Fleet (Madison area only). If no state vehicles are available and the driver receives a nonavailability slip, the driver will receive reimbursement from the state for miles used for official state business. The reimbursement rules for use of an employee's personal vehicle are defined in the UTSA. When drivers use their private vehicle for state business, a Travel Expense Report, DOA-6107 or equivalent (Appendix XI) must be submitted in accordance with the policies of the employee's agency. When required, the non-availability slip must be attached to the driver's travel expense report. Requests for waiver of the non-availability criteria must be in writing to the DOA Secretary and must indicate specific reasons why the waiver should be granted. All non-availability slips must indicate the date of the request, the dates for which a pool vehicle was requested, and must be approved by the agency fleet manager/coordinator.

Disabled employees requesting a waiver from the non-availability slip requirements driving their own specially equipped vehicles must be authorized by the agency's ADA/human resources coordinator for a period of one year or less. Employees who are permanently disabled need to obtain a medical statement only once during their career in state service stating that they are permanently disabled; however, DOA reserves the right to review the permanency of determination.

Accidents and Liability

1.25. Driver Procedure

Drivers are responsible for immediately reporting all accidents or any damage to state vehicles to the agency fleet manager and to the appropriate agency/fleet coordinator or risk manager. Forms are provided

for this purpose in the vehicle incident kit, DOA 6496 (Appendix VI). Reports must also be made to local law enforcement personnel. If all paperwork is not submitted in a timely manner, the claim may be denied and the agency is responsible for the cost of repairs.

The driver should consult with their agency fleet manager to confirm appropriate accident reporting procedure for their agency.

Each state vehicle has an accident kit in the glove compartment advising employees of the procedures to be followed in the event of an accident. All procedures included in the accident kit need to be followed. According to the instructions in the kit, the driver of the state vehicle must follow these procedures after an auto accident involving a state vehicle:

1. Contact the nearest law enforcement agency to notify them of an accident.
   - Obtain relevant information required from other parties involved to complete the Accident/Incident Report, DOA-6496 or equivalent (Appendix VI).
   - Ask for the case number and when the police report will be available.
   - Driver is required to seek a police report for all vandalism or hit-and-runs that exceed $200, accidents resulting in injuries, vehicle damage over $1,000, and/or property damage over $200.

2. Report the accident immediately to appropriate supervisor, agency fleet manager/coordinator and risk management staff.
   - If outside of normal business hours, leave a voice mail or send an e-mail to the owner agency fleet manager or BSRM with the following details: name, phone number, and a brief description of the loss.
   - If there is any bodily injury, immediately contact the Fleet Manager or DOA BSRM (608/267-7395). If after hours or on the weekend, call and leave a message on voice mail with the driver's name and number where he/she can be reached.

3. Complete the Vehicle Accident/Incident Report Form DOA 6496 the same day including a supervisor signature and scope box checked and return to the agency risk manager or fleet coordinator within two (2) working days.
   - This accident report form may be found in the glove box of the vehicle, on the DOA web site (http://www.doa.state.wi.us) or may be obtained from the agency risk manager.
   - If the driver is unable to complete the accident report form, the supervisor is responsible for completing it. It is extremely important that the information is accurate and all blanks are filled in, including the driver and supervisor signatures.
   - If a state employee is injured, the appropriate workers compensation forms should be completed by the employee or the employee's supervisor if the employee is unable to complete the forms.

4. Obtain and submit a copy of the police report to the agency risk manager.
   - If the police do not respond or do not complete a Wisconsin Motor Vehicle Accident report, but there is an injury, vehicle damage of $1,000 or more, or $200 or more damage to government owned non-vehicle property, complete the Wisconsin Driver Report of Accident, DMV4002 (Appendix VII) found in the vehicle's glove box or on the Department of Transportation (DOT) web site (http://www.dot.state.wi.us).
   - If the driver report form is not in the vehicle, it is available at any DMV or local law enforcement office. Mail the original form to DOT, a copy to your agency fleet manager and a copy to the vehicle owner agency along with the Accident/Incident Report.

5. Contact the vehicle owner agency. See agency procedures.

1.26. Property and Liability Protection

The State is self-insured through its self-funded property and liability programs administered by BSRM. BSRM also administers the worker's compensation program for state employees injured while in the scope of their employment.

1.27. Worker's Compensation Coverage

Injured state employees may use their health insurance, worker's compensation, or self-initiated litigation to recover damages against negligent third parties. Worker's compensation pays for medical expenses, hospital expenses and loss of wages for state employees injured while in work status. There is no worker's compensation coverage when the employee is not in work status or is acting outside the scope of his/her employment.

1.28. Property Coverage – State-Owned and Leased Vehicles

The Property Program covers loss to state property, which includes damage to state vehicles due to traffic crashes, vandalism, hail, etc. If another driver or a known party causes damage, the agency that owns the state vehicle will pursue subrogation. Damage to vehicles leased by the state from a private vendor for more than 30 days are also covered under the Property Program if the value of the leased vehicle is reported to BSRM.

Rentals of less than 30 days under the state's rental passenger vehicle contract include collision and liability coverage in the price of the rental and are handled by the contracted rental agency.

1.29. Liability Coverage

Auto liability coverage is for claims in which a person driving a state vehicle in the scope of their state employment causes damage to a third party. Although a state vehicle may be damaged as well, only the damages to the third party are considered auto liability. For example, if a state vehicle backs into a privately owned vehicle in a parking lot, the damage to the state vehicle would be considered auto property and the damage to the other vehicle and/or injuries to the other driver and passengers would be considered auto liability. If a vehicle is rented under the state rental contracts, auto liability coverage is included in the rental fee. If the vehicle is leased, auto liability coverage is provided under the state's program. If a driver is traveling outside of Wisconsin, proof of insurance must be carried.

If a driver is traveling outside of the United States, the driver must consult their risk management office prior to driving or renting a vehicle. If the agency does not have a risk management office, the driver must consult BSRM. If a driver is travelling outside of the United States in a state vehicle, proof of insurance must be carried. If a driver is traveling outside of the United States, both auto liability and physical damage coverage must be purchased with the rental vehicle as well as carrying proof of insurance.

Coverage is provided on the authorized state driver/employee pursuant to Wis. Statute, s. 895.46, which provides liability protection for the negligent acts of its state officers, employees and agents while acting within the scope of their employment. Liability coverage is limited to $250,000 per claimant per negligent state employee, as stated in s. 893.82, Wis. Stats. Claims that result from a state employee's actions in states other than Wisconsin are not subject to this statutory limit.

There may be no state liability coverage if:

- An unauthorized driver of the state vehicle operates the vehicle, or
- An authorized driver of the state vehicle operates a work shared vehicle outside the scope of their employment.

In each of these cases, the driver may be personally responsible for the damages to any third party and may also be responsible for payment of damages to the state vehicle.

Any accident resulting in bodily injury to a third party should be reported immediately to law enforcement and the agency risk manager or the BSRM (608/267-7395) for assignment to the State's third party adjuster. The state driver should always convey the facts to any responding authority but should never admit fault at the accident scene. The adjuster may subsequently investigate the liability claim and handle all contacts with the other party, their attorney and/or their insurance company and will make a recommendation to the BSRM and request authorization for a proposed settlement range, if appropriate.

1.30. Privately Owned Vehicles

Damages to the employee's personal vehicle are covered by the employee's own auto insurance and the employee is responsible for the insurance deductible. Under no circumstances will the State's property program pay for the employee's vehicle repairs. It is the employee's responsibility to carry personal auto liability insurance. Recommended minimum limits of personal auto insurance coverage are $100,000 for bodily injury per person, $300,000 for bodily injury per accident when two or more people are injured, and $50,000 for property damage per accident.

The employee's personal auto liability insurance also provides primary coverage for medical expenses incurred by other parties involved in an employee's at-fault accident, and primary coverage for repairs to other vehicles or property involved in an accident caused by the employee. The State liability program only provides coverage for amounts in excess of the employee's auto liability insurance if the state employee was negligent and within the scope of employment when the accident occurred.

Questions may be referred to the driver's agency fleet manager, agency risk manager or BSRM.

1.31. State Vanpool Program

The State Vanpool Program operates outside of normal business hours and is open to state, private and federal employees commuting to Madison from outlying areas. Therefore, the state purchases liability insurance for the Vanpool through a commercial insurer. State employees participating in the Vanpool Program are considered to be outside the scope of their employment and consequently would not be covered by Workers Compensation if injured. The Property Program does cover damage to State Vanpool Program vehicles.

Chapter Two: Fleet Management Policies

Fleet Manager Responsibilities

2.1. Department of Administration Responsibilities

Under s. 16.04, Wis. Stats., DOA is assigned the following responsibilities for managing all state vehicles:

- Develop uniform state policies and guidelines for vehicle acquisition, use, and maintenance.
- Keep up-to-date records on operational costs, vehicle performance evaluations and replacement of vehicles.
- Screen all requests for additional or replacement vehicles prior to forwarding those requests to the Governor for approval.
- Maintain an inventory of all state vehicles.
- Review agency records relating to fleet operations and the use of state vehicles on a semi-annual basis.

The DOA Division of State Agency Services performs these responsibilities.

2.2. Agency Responsibilities

State agencies authorized by DOA under s. 16.04(2), Wis. Stats., to manage and operate state vehicles must adhere to the Fleet Driver and Management Policies and Procedures. The DOA Secretary must authorize any deviations from these policies in writing prior to any use of any state vehicle in a manner which does not adhere to the policies and procedures. A state agency authorized to operate state vehicles must have an employee designated to perform a minimum of two of the following three levels of fleet administration: Fleet Manager, Fleet Coordinator, Driver Supervisor.

2.3. Fleet Manager

An agency that controls the deployment of owner agency vehicles acquired with agency/campus funds must employ a fleet manager. Fleet managers are responsible for the following:

- Designate and review vehicle assignments
- Establish maintenance procedures
- Evaluate and recommend vehicle procurement needs
- Identify surplus vehicles for sale disposition
- Maintain vehicle history records
- Maintain records
- Monitor direct and indirect fleet costs
- Maintain fleet required data

2.4. Fleet Coordinator

Agency fleet coordinators are the owner agency's representatives and assist in carrying out the fleet manager's duties at a local level. Fleet coordinators in a non-owner agency also act as the agency's central point of contact regarding fleet administration. An agency or agency sub-unit that operates leased vehicles must designate one of their employees to perform the minimum administrative requirements contained in these policies for using state vehicles. The fleet coordinator also interprets fleet policies and provides

assistance to administrators and drivers regarding these policies. Fleet Coordinators are responsible for the following:

- Authorize the use of state vehicles
- Ensure adherence to fleet maintenance procedures
- Communicate and forward information regarding vehicle needs to fleet managers/drivers/supervisors
- Identify underutilized/replaceable vehicles
- Monitor vehicle use (e.g., mileage logs)
- Monitor costs that must be reimbursed to the State by the employee
- Investigate citizen driver complaints
- Assist in obtaining missing or erroneous driver reports

2.5. Driver Supervisor

The supervisor of a driver is responsible for the following:

- Maintain up-to-date knowledge of fleet policies and procedures
- Educate their staff/drivers of all policies and procedures
- Ensure completion of initial Vehicle Use Agreement for their employees
- Submit requests for a vehicle assignment
- Manage mileage envelopes/logs including a review of personal use

2.6. Required Training

Once every two years fleet managers/coordinators will be required to attend Fleet Management Training held by DOA Division of State Agency Services. This training will review for fleet manager/coordinators current Fleet Driver and Management Policies and Procedures.

Driver Management

2.7. Approving Vehicle Use Agreements

Prior to operating any state-owned vehicle, a driver (see Chapter One, 1.1.) must have a signed and approved Vehicle Use Agreement Form (VUA), DOA-3103 or equivalent (Appendix I). An employee is prohibited from operating a state vehicle until the VUA is authorized by the employing agency fleet manager/coordinator and kept on file for annual review. A driver should expect a minimum of two weeks for processing and the driver is responsible for verifying approval/denial with the fleet manager/coordinator.

The VUA contains a provision signifying that the driver has been given a copy of the Fleet Driver and Management Policies and Procedures Manual and the driver acknowledges an understanding of and future compliance with the directives in the manual. The manual is also available on the DOA web page (http://www.doa.state.wi.us). Supervisors should assure that drivers have access to the policy manual. The VUA also requires the driver's license number and informs the driver of their obligation to inform their supervisor and agency fleet manager/coordinator in writing whenever they become disqualified under these policies. New drivers must receive an orientation from their supervisor. At a minimum the orientation will include personal use rules, fueling procedures, monthly reporting, repair/maintenance procedures, accident reporting and safety. The driver supervisor reviews and approves the VUA and forwards the form to the employing agency fleet manager/coordinator.

The fleet manager/coordinator from the employing agency should methodically review the submitted VUA. Approval or denial of the application is based on, but not limited to, the minimum standards for driving a state vehicle (see Chapter One, 1.1.) and driver disqualification (see Chapter One, 1.3.). A driver will be rejected for failure to meet these standards. The applicant's Department of Transportation (WisDOT) driver record must be reviewed. To obtain the abstract the fleet manager/coordinator must submit to the WisDOT the prospective driver's full name, driver license number, date of birth and the state where the driver license was issued.

Agency fleet managers/coordinators should consult with their risk managers regarding any requests for exceptions to the minimum standards or driver disqualification requirements (see Chapter One, 1.1. and 1.3.).

Fleet managers/coordinators should also be aware that based on the type of vehicle being driven, special training and/or licensing may be required prior to vehicle use. For example, training is required for driver certification for the operation of twelve and 15 passenger vans (see Chapter One, 1.4.). Commercial Drivers Licenses (CDL) are also required for certain state positions (see Chapter One, 1.5.). Fleet managers/coordinators are responsible for confirming that training is complete before approving a VUA.

Only after a complete review, the fleet manager/coordinator shall indicate their decision on the form and send a copy of the form to the owner agency fleet manager and the agency risk manager. The owner agency will enter the driver in statewide data system.

2.8. Monitoring Vehicle Use Agreement

Each year, a review of all driving records of employees with active Vehicle Use Agreements will be conducted. An employee who, as a result of the review, no longer meet minimum standards for driving a state vehicle shall have his/her agreement voided and their driving privileges suspended until such time that he/she can demonstrate meeting the standard.

If an employee is denied use of a state vehicle due to an unacceptable driving record and travel is required, the employee (who must hold a valid operator's license) may use his/her personal vehicle and be reimbursed for mileage. Reimbursement will be at the rate equal to the full business mileage reimbursement rate established for an employee required to use their personal vehicle on state business set in the current UTSA (Appendix II).

See Chapter One, 1.3., for driver policies related to driver disqualification.

2.9. Personal Use of State Vehicles

See Chapter One, 1.7., for driver policies related to personal use of state vehicles.

2.10. Political Use of State Vehicles and Aircraft

See Chapter One, 1.8., for driver policies related to political use of state vehicles and aircraft.

2.11. Incidental Travel and Stops

See Chapter One, 1.9., for driver policies related to incidental travel and stops.

2.12. Reimbursing Personal Miles to the State

See Chapter One, 1.10., for driver policies related to reimbursing personal miles to the State.

Vehicle Management

2.13. Vehicle Assignments

Fleet managers/coordinators are mandated to monitor the assignment and use of vehicles by all agency employees on a semi-annual basis, or more frequently, if necessary. Fleet managers/coordinators must also keep records up-to-date upon notice of a change in vehicle status. The review should specifically examine the distribution of vehicles that are assigned as work shared, personally assigned, motor pool or non-qualified personal use. All changes of assignment for vehicles must be done using the Vehicle Assignment Transfer (VAT) form, DOA-3102 or equivalent (Appendix III) and be submitted to the owner agency with a copy to the DOA Bureau of Enterprise Fleet Director.

In addition to determining assignment type, fleet managers/coordinators review and ensure the appropriate size of the vehicle and make a recommendation to their agency head for approval. Restrictions are set in the Vehicle-Procurement Information Memorandum (PIM) issued by the State Bureau of Procurement, stating it is the responsibility of every agency to review and restrict the assignment of vehicles. The PIM is available at http\\www.doa.state.wi.us keyword: procurement. The vehicle size must be based on the number of passengers in the vehicle and the amount of equipment or luggage being carried. Medical necessity is the only other reason a larger vehicle may be assigned and must be approved by the agency fleet manager.

Disabled employees seeking a waiver from the non-availability requirements for driving their own specially equipped vehicles must be authorized by the agency's ADA/human resources coordinator on how to accommodate the need. Employees who are permanently disabled need to obtain a medical statement only once during their career in state service, stating that they are permanently disabled; however, DOA reserves the right to review the permanency of determination.. These drivers will be reimbursed at the "full rate" set in the current UTSA (Appendix II).

2.14. Personally Assigned Vehicles

All assignments will be approved or denied through the Vehicle Assignment Transfer (VAT) form, DOA-3102 or equivalent (Appendix II). VATs requesting Personal Assignment of a vehicle must be signed by the requesting agency head. The VAT must be submitted to the owner agency with a copy to the DOA Bureau of Enterprise Fleet Director for approval. All rules relating to personal use of the state vehicle are strictly enforced.

See Chapter One, 1.20., for driver policies related to personally assigned vehicles.

2.15. Work Shared Vehicles

Work shared vehicles must have a designated coordinator who is responsible for scheduling use of the vehicle(s), maintenance and repair, maintaining the Assigned Vehicle Log, DOA-3472 or equivalent (Appendix III), and ensuring compliance with state fleet policies. Reassigning work shared vehicles requires the fleet manager/coordinator to file a VAT with the owner agency. Agencies should attempt, when feasible, to reassign personally assigned vehicles and consolidate shared vehicles into pools to

minimize the need for additional vehicles. All requests for reassignments must be reviewed and authorized by the DOA Bureau of Enterprise Fleet Director.

See Chapter One, 1.21., for driver policies related to work shared vehicles.

2.16. Motor Pool Vehicles

Fleet managers/coordinators managing a motor pool have added responsibilities because many drivers use the vehicles. Each driver using a pool vehicle must meet the minimum standards for driving a state vehicle and have an approved VUA on file. It is the responsibility of the fleet manager/coordinator to ensure maintenance and manufacturer recall repairs are complete.

Pool vehicles are to be reserved and issued to drivers by their agency dispatcher. A record must be made of each pool vehicle trip with beginning and ending mileage noted. The agency dispatcher ensures that the driver is authorized to travel and has obtained a supervisor signature. A supervisor always must approve use of the vehicle by an employee. Vehicle assignment will be the smallest available vehicle based on the number of occupants and equipment/luggage to be carried.

Pool vehicles are subject to an annual review based on the breakeven mileage criteria determined by the DOA Secretary. Exceptions to the breakeven mileage criteria may be granted upon recommendation of an agency head and with written approval of the DOA Secretary. The number of vehicles assigned to a motor pool may increase or decrease to achieve optimum resource allocation.

See Chapter One, 1.22., for driver policies related to motor pool vehicles.

2.17. Qualified Non-Personal Use Vehicles

See Chapter One, 1.23., for driver policies related to qualified non-personal use vehicles.

2.18. Vehicle Maintenance Policies

Fleet managers will develop and maintain a preventative maintenance program and procedures for unscheduled maintenance for the state vehicles owned by their agencies. Fleet coordinators will follow established policies and programs and manage maintenance. Supervisors will ensure compliance by drivers for maintenance related issues.

State vehicles must be serviced and maintained according to factory recommendations and the owner agency fleet manager must produce a maintenance schedule. Agency fleet managers/coordinators are responsible for scheduling service and maintenance on pool vehicles. Drivers are responsible for service and maintenance of personally assigned vehicles and agency fleet managers/coordinators for work shared vehicles. Mileage accumulated during this endeavor shall be considered business mileage. An authorized dealer shall do warranty work.

When a driver/fleet coordinator has been notified of any type of needed repair, including recall, warranty, maintenance and body repair, it is their responsibility to have the vehicle serviced in a timely manner. Failure to perform needed repairs may result in a loss of the vehicle, or in the event of damage to the vehicle the agency/driver may be subject to payment for vehicle repair. When notified by the fleet manager/coordinator of a driver's failure to comply with required repair procedures, it is the responsibility of the driver's supervisor to immediately contact the driver and ensure compliance.

Generally, maintenance is authorized through a managed maintenance contractor, a State service facility or purchase order. Only in an emergency situation may vehicle maintenance be secured with a personal credit card or cash. If maintenance is paid through purchase order, vendors must be selected from the SBOP Statewide Bulletin for Vehicle Maintenance Service. If cash is used, an original receipt must be submitted to the agency supervisor with a travel voucher to secure a reimbursement approval along with justification for the repairs. Fleet managers/coordinators are advised to consult with the SBOP (608/266-2605) for the appropriate procedures to follow. State Purchasing Cards (P-Cards) are not to be used for vehicle expenses.

Vehicle maintenance and repairs for automobiles and light trucks must be secured through purchase order if a managed maintenance contractor is not used. All receipts for service outside of a managed maintenance contractor should be signed and retained by the driver who is then responsible for turning in those receipts either:

- At the end of their pool reservation, or
- At the end of each month with their assigned vehicle log forms and mileage envelopes.

The appropriate fleet manager/coordinator/supervisor is to review the maintenance tickets and reports. Drivers who have turned in questionable or unnecessary maintenance expenses must be contacted for further investigation and possible reimbursement to the vehicle's owner agency. Failure to reimburse may result in the loss of driver privileges.

The driver should also be aware that there are cost limits related to vehicle services and an agency fleet manager must approve purchases above the limits. For example, vehicle wash rates for personally assigned and work shared state vehicles are calculated on a yearly basis and drivers seeking vehicle washes exceeding the maximum allowable cost must receive approval from their fleet manager. Drivers will be billed for any amount in excess of set rate. Wash frequency is also limited to once a week, if needed, November through March (winter months) and limited to two times per month April through October. Washes and other vehicle services will be reviewed. Drivers with excessive wash frequency will be notified. Detailing of a vehicle must be done at the leasing agency's expense and with agency approval. Typically, detailing occurs if the vehicle has been used to haul dirty or odorous materials or has been used off-road.

Receipts for vehicle maintenance do not need to be turned in by the driver if they are using the state contracts for managed maintenance services. All maintenance and repairs must be tracked for each vehicle in the fleet. This is done electronically through a maintenance contractor or through retention of hard copies of bills and work orders. If a managed maintenance contractor is used, they will track all costs through their vendor network and report them on a monthly basis to the owner agency fleet manager. If a managed maintenance contractor is not used then copies of receipts and/or work orders must be retained and forwarded at the end of their pool reservation, or at the end of each month with their assigned vehicle log forms and mileage envelopes.

Fleet managers/coordinators/supervisors are responsible for ensuring vehicles are maintained and confirming their drivers understand the importance of the maintenance function and accept their responsibility in helping to maintain the vehicles that they drive. All drivers should be educated to increase their awareness of the vehicle's daily performance.

2.19. Vehicle Fuel Policies and Fuel Card Uses

See Chapter One, 1.17., for driver policies related to vehicle fuel policies and fuel card uses.

2.20. Plain Plate Requirements

All state vehicles are required to have red state owned license plates with the exception of vehicles authorized by DOA; for instance, undercover law enforcement. Any deviation from this policy requires written request from the agency head and authorization from the DOA Bureau of Enterprise Fleet Director.

Accidents and Emergencies

2.21 Driver Procedures

See Chapter One, 1.25., for driver policies related to driver procedures.

2.22. Agency Risk Manager or Repair Coordinator

The agency risk manager or repair coordinator is responsible for submitting the following information to the owner agency, which handles the property claim and submits it to BSRM for payment if over $500:

- Police report or DOT Driver Report of Accident Form, MV4002 (Appendix VII)
- Vehicle Accident/Incident Report Form, DOA-6496 (Appendix VI)
- Photographs of damage (if photos were taken)
- Two written estimates: If vehicle is totaled, documentation should also be submitted which supports the actual cash value of the vehicle.
- For property claims, one signed Proof of Loss Form, DOA-6413 or equivalent (Appendix VIII)

2.23 Repair/Accident Coordinator Procedure

In the event of an accident, the repair/accident coordinator is responsible for the follow up and approval of repairs of the agency owned state vehicle and must adhere to the following steps:

1. Check to see that a police report is completed on vehicle damage over $1,000, property damage over $200, injuries, or hit and run damage/vandalism over $200.
2. Contact driver with a policy and procedures instruction sheet
3. Inform driver to complete Accident/Incident Form, DOA-6496 or equivalent (Appendix VI), and return it within 48 hours of the accident. Copy sent to owner agency and also to BSRM if it is an injury case. Failure to report in a timely manner may result in loss of vehicle or incurring repair costs.
4. Request/receive police report from the appropriate police department(s) for all cases.
5. Inform driver to get two estimates. The repair coordinator or managed maintenance contractor can assist in recommending vendors.
6. Forward estimates to owner agency.
7. Owner agency reviews estimates and provides authorization to proceed with repairs.
8. Follow up with a call/email to driver requesting more information, if needed.
9. Follow up with a call/email to driver and supervisor if problems arise.
10. Follow up with driver and supervisor every ten to 15 days on status of the repairs.
11. Compare invoice to estimate final invoice from repair shop.
12. Compares invoice to estimates and approve invoice, submit final packet to agency risk manager who will send to the BSRM.

2.24. Driver Claims-Recovery of Losses

Injured state employees may use their own health insurance, worker's compensation, or litigation on their own to recover damages against negligent third parties in a case with an injury.

Auto Claim Reporting – Property

Auto property claims over the $500 deductible are to be finalized and filed with BSRM within 90 days from the date of loss. Claims submitted beyond 90 days may not be honored. Auto property claims of over $10,000 should be immediately reported to the agency risk manager and/or BSRM to determine if assignment to the State's third party adjuster is necessary. If outside of normal business hours, leave a voice mail or send an e-mail to BSRM or the agency risk manager or fleet manager with the following details: name, phone number, and a brief description of the loss.

For claims that will not be finalized within 90 days from date of loss and are not assigned to the State's third party adjuster, an agency should instead submit to BSRM a written statement putting BSRM on notice of the claim with an explanation as to why the claim is not finalized.

State auto property coverage pays the lower of either the cost to repair or the actual cash value of the vehicle on the date of loss, less the applicable deductible. Repairs should be supported with two (2) estimates and any sales tax must be deducted. Betterment or upgrades are not covered and such costs should be deducted from the claim. Actual cash value (ACV) is determined by the trade-in value listed in the National Automobile Dealers Association (NADA) Official Car Guide or comparable source, adjusted for mileage minus salvage.

Auto Claim Reporting – Liability

Auto liability claims should be concluded and submitted by an agency to BSRM within 120 days from the date of loss, as provided by s. 893.82, Wis. Stats. Prompt settlement will also result in less cost and greater satisfaction for the claimant. Any accident resulting in bodily injury to a third party should be reported immediately to the agency risk manager and/or BSRM for assignment to the third party adjuster. If outside of normal business hours, leave a voice mail or send an e-mail to BSRM with the following details: name, phone number, and a brief description of the loss.

The third party adjuster is responsible for performing the investigation and handling all contacts with the claimant, attorney and/or insurance company. The adjuster will make a recommendation to the BSRM and request authorization for a proposed settlement range, if appropriate.

State liability coverage pays the lower of two (2) estimates. The vehicle is considered totaled if the lower estimate exceeds the retail value listed in the NADA Official Car Guide or comparable source, adjusted for mileage and salvage value.

If the third party driver requires a rental vehicle during the time that his or her vehicle is being repaired, the state will pay the daily base rate for an economy (compact) vehicle plus sales tax. The claimant will not be reimbursed for the purchase of any insurance, damage waiver, fuel charges or additional mileage charges that they incur.

Recovery of Losses

Each agency will be expected to attempt to collect, in accordance with accepted insurance industry practices, from those individuals or firms that cause damage to state vehicles. The first dollars recovered by the agency shall be used to satisfy the deductible. Any recovered amount that exceeds the deductible shall be used by the agency to reduce the claim to the BSRM. The remaining balance should then be submitted to the BSRM for processing.

In an effort to reduce or eliminate late reporting of auto losses to the BSRM, agencies are encouraged to submit covered auto losses to the BSRM before undergoing a long subrogation process. The BSRM or its representative may assume the agency's right of recovery when an agency files a claim. In those situations, all losses will be subject to the applicable deductible.

Driver should be directed to the vehicle owner agency for additional information.

Records Management

2.25. Record Keeping and Reviews

Rigorous record keeping and substantiation are required by the employee or agency fleet manager/ coordinator and failure to report will result in a seizure of the vehicle. Under s. 16.04, Wis. Stats., each fleet manager shall review the use of state vehicles within their agency at least semi-annually to determine whether usage criteria are being met. Reports must be submitted to the DOA Secretary and include a detailed description of the utilization of each vehicle and justification of need.

Failure to submit the semi-annual review justifications may result in a delay in the purchase of new vehicles until a review of the usage of all state vehicles is complete and all agencies have responded to DOA's request. Non-reporting agencies may also be subject to loss of vehicles as determined by the DOA Secretary.

Personally assigned and work shared assignments must be evaluated annually for the following:

- Minimum utilization for personally assigned vehicles is based on 16,000 miles of annual official state business use and 13,000 miles of annual official state business use for work shared vehicles or criteria annually established by the DOA Secretary.
  - DOA Secretary may grant special exceptions to the mileage criteria only after recommendation by the agency head.
  - Agencies will have 30 days to submit written justification on why vehicles that do not meet the criteria of the DOA Secretary should be assigned to the agency.
- Overall availability of vehicles in the fleet.
- Requirements such as those for federal grants or collective bargaining agreements.
- Determination of whether the priority of the assignment is in line with agency priorities and overall travel demand.
- Changes in the scope of work that may require a change in the vehicle type needed to accomplish the work objectives.
- Continued need for special purpose vehicles.
- Reimbursement to the State for personal use of personally assigned vehicles.

Fleet managers, in conjunction with the agency's annual vehicle report, will evaluate which vehicles are eligible for replacement. Eligibility for replacement is set out in a Procurement Information Memorandum (PIM) issued by the SBOP. Fleet managers/coordinators should follow the procedures of the owner agency in requesting replacements. Vehicle replacement occurs once per year. Mid-year requests may be made only in an emergency and, if approved, must be from existing stock or by recalling an underutilized vehicle. The purchases of new vehicles may only occur based on the approval of the Governor.

Requests for additional vehicles should follow the same procedure as requesting a replacement and must include a thorough analysis of internal vehicle reallocation, including any legislation or budget information that would authorize additional staffing or duties. Forms and additional instructions can be found on the SBOP website at http://www.doa.state.wi.us keyword: procurement.

2.26. Mileage Reports

Employees using personally assigned, work-shared and qualified non-personal use vehicles for state business must keep track of business miles on a daily basis with the Assigned Vehicle Log form, DOA-3472 or equivalent, (Appendix IV) and Mileage Report (envelope), DOA-3223 or equivalent, (Appendix IX). The mileage log and report should contain following information:

- Date
- Mileage
- Starting Location
- Destination
- Business Purpose
- Personal Use Mileage
- Passengers

On a monthly basis the driver or work share coordinator is required to submit two documents, the Assigned Vehicle Log and the Mileage Report. Vehicle logs must be submitted to and maintained by the fleet coordinator. The Assigned Vehicle Logs must remain at the employing agency. At the end of every month, the driver responsible for the vehicle is to return the completed Mileage Report to the owner agency. The Mileage Report indicates the beginning and ending odometer readings for the vehicle along with any personal mileage and must include reimbursement for any personal miles. A supervisor signature is required on all Mileage Reports.

The State Controller's Office in collaboration with DOA Division of State Agency Services will assist agencies in calculating personal mileage reimbursement under Chapter One, 1.10. Agency heads are ultimately responsible for ensuring that personal mileage reimbursements are properly made. However, supervisors have the first-line duty and are directly responsible for ensuring that all personal mileage reimbursements are made by drivers under their supervision agency fleet coordinators are to assist supervisors to ensure that drivers are recording personal mileage use and are making proper reimbursements for personal mileage in assigned vehicles.

Mileage reports must be kept up-to-date and maintained by the employing agency. Failure to submit reports and maintain logs in a timely manner may result in a loss of vehicle privileges. Reported personal/commute miles are considered a reimbursable travel and reimbursements must be made in accordance with the guidelines previously identified.

Fleet coordinators/supervisors are responsible for ensuring that mileage information is properly recorded and filed on work shared and personally assigned state vehicles as well as maintain the Assigned Vehicles Logs. Vehicle reassignment may occur if monthly mileage reports are late or missing three times in a twelve-month period.

2.27. Fleet Related Record Retention

In general, fleet managers/coordinators should follow the General Schedule for Motor Vehicle Management Records (Appendix X) retention procedures required by their agency in terms of the records identified in these fleet policies and procedures. The following fleet records are subject to retention times (as indicated):

- Policy and Administration Subject Files (Current Fiscal year + 4 Prior Years)
- Motor Vehicle Related Project Files: research, grants, trends in vehicle resale (Current Fiscal year + 4 Prior Years)
- Motor Vehicle Correspondence: correspondence not covered under other sections (Creation Date + 1 Prior Year)
- Motor Vehicle Acquisition Case Files: records relating to the purchase of vehicles by the State (Current Fiscal year + 4 Prior Years)
- Motor Vehicle Sales and Surplus: records related to the transfer, sale, donation, salvage or exchange of vehicles. (Current Fiscal year + 4 Prior Years)
- Vehicle Titles (Creation Date + 5 Prior Years)
- Motor Vehicle Maintenance Records: service and repairs orders for motor vehicles (Creation Date + 5 Prior Years)
- Supplies and Parts Inventories: running inventories of vehicle related supplies and stocks of expendable materials. (Current Fiscal year + 4 Prior Years)
- Supplies and Parts Disbursement Records: disbursement of vehicle related supplies and stocks of expendable materials. (Current Fiscal year + 4 Prior Years)
- Motor Vehicle Control, Assignment and Use Records: includes VUA, pool vehicle requisition forms, and non availability slips (Date of driver separation from state service or recession of authority to drive a state vehicle + 1 Prior Year)
- Motor Vehicle Cost Accounting Records: includes mileage records (Current Fiscal year + 4 Prior Years)
- Vehicle Accident/Incident Reports (Case closed date + 1 prior year)

Hard copy files are required for the following types of documents:

- Accident reports
- Vehicle Use Agreements
- Vehicle Assignment Transfers
- Travel Logs
- Non-electronic receipts for fuel, maintenance and repairs

2.28. FleetAnywhere Database Reports

All agencies are required to report their vehicle information in the FleetAnywhere database. Fleet managers must maintain detailed records on fleet equipment, fleet and fleet user attributes. Use of the FleetAnywhere database to maintain this information is mandatory. As implementation of FleetAnywhere continues, further data requirements will be identified; however, at a minimum the following information must be obtained and maintained for all state vehicles:

- Equipment ID
- Make
- Model
- Year
- Color
- VIN#
- License Plate Number
- Fuel Types
- Transmission Type
- Engine Size and Cylinders
- Date of Vehicle Disposition
- Purchase Price
- Vehicle Modifications
- Maintenance Schedule
- Purchase Date

On-going data maintenance:

- Fuel use
- Repair history
- Assignment history
- Mileage history
- Assignment status
- Depreciation
- Recall Disposition

2.29. Public Records Requests and Special Reports

As necessary, fleet managers/coordinators will respond to requests for information or special reports from the DOA Secretary or the Legislature. Fleet managers and coordinators will provide a timely response to all such requests.

2.30. Lease and Rental Rates

Agencies owning vehicles must annually publish their daily rental and lease rates effective on or about July. Each Fleet Manager who maintains a pool must establish criteria and charges for late returns and no-shows for vehicles and publish that schedule.

2.31. Citizen Driver Complaints

If a call is received from a citizen regarding the driver of a state vehicle, gather as much information as possible about the incident including date, time, location, license plate, vehicle ID, description of driver (e.g., gender), make, model, color of the vehicle and a detailed description of the incident. Obtain the caller's name and telephone number if they are willing to give it.

- If the vehicle is not in your fleet, determine the owner agency and forward the information to the fleet contact or to DOA Division of State Agency Services to determine its disposition.
- If the vehicle is in your fleet or a complaint is forwarded to you, forward the complaint to the fleet manager/coordinator.

The agency fleet manager/coordinator should record the complaint in detail and communicate with the driver's supervisor. For work shared vehicles, the fleet manager/coordinator may need to contact the supervisor to determine the identity of the driver. The supervisor may be asked to respond fully to the complaint, which may include replying directly to the citizen, but only at the citizen's request. While these are not moving violations in the manner reviewed for driver disqualification (see Chapter One, 1.3.), they may become the basis for suspending driving privileges if there are multiple complaints logged.

Appendix Directory

Documents referenced in this manual are published in *Fleet Driver and Management Policies and Procedures Appendix* at http://www.doa.state.wi.us keyword: fleet appendix.

I. DOA-3103, Vehicle Use Agreement (VUA) Form
II. Office of State Employment Relations (OSER), Uniform Travel Schedule Amounts (UTSA)
III. DOA-3102, Vehicle Assignment Transfer (VAT) Form
IV. DOA-3472, Assigned Vehicle Log Form
V. DOA-AD-GS-75, Non-Availability Slip
VI. DOA-6496, Vehicle Accident/Incident Report Form
VII. MV4002, Department of Transportation, Driver Report of Accident Form
VIII. DOA-6413, Proof of Loss Form
IX. DOA-3223, Mileage Report (Envelope)
X. General Schedule for Motor Vehicle Management Records
XI. DOA-6107, Travel Expense Report