Welcome to GSA Fleet's Desktop Workshop

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Questions: Use the Q&A window to ask questions at any time. You may get a typed response or it may be answered aloud at the end of the presentation.

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Desktop Workshop

FY25 Leased Vehicle Replacement Request and Approval Process

You can download a copy of this presentation at: https://www.gsa.gov/gsa-fleet-training.
For accessibility help email: gsa.fleet.acquisition@gsa.gov

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January 23, 2025

Agenda

Today's Topics Include:

- FY25 Acquisition Cycle Expectations

- FY25 Key Dates

- Process Overview & Demo

- Tips for Successful Acquisition Cycle

- Q&A

FY25 Expectations & Key Dates

FY25 Expectations/Planning

- **Eligible Tag Lists (Completed)**

  – FSRs reviewed list of eligible tags prior to launch

  – Agency HQ Fleet Managers provided with finalized eligible vehicle lists for planning purposes

  – Only those tags deemed replaceable will be loaded into GSAFleet.gov

- **Benefits**

  – Early conversations between FSRs and local customers

  – Internal communication within the agency to determine suitable replacement vehicles prior to launch

FY25 Expectations/Planning

- **Later launch date and expedited review periods**

  – Anticipated launch date January 22, 2025

  – 2 weeks at each approval level

  – Alternate approvers should alleviate approval delays

- **Keep things moving!**

  – No need to wait for established deadlines - take action as soon as possible to request/approve replacement vehicles

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FY25 Key Dates

Date	Critical Event
01/22/2025	Leased Vehicle Replacement Cycle Begins
02/07/2025	Vehicle requests due to Bureau Level Approvers
02/21/2025	Bureau level approved vehicle requests due to HQ
03/07/2025	HQ approvals due - End of approval process
March (Tentative)	Additional Request Process Available

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Deadline Adherence

Adhering to approval deadlines is <u>critical</u> to a successful acquisition cycle for everyone:

- Enables your FSR to order the replacement vehicles as soon as possible

- Reduces cost to the government due to price increases

- Minimizes the impacts of manufacturer model closeouts. Closeouts may require customers to make changes to the type of vehicle selected, options or colors due to shifting availability and increased costs

Communication is Key!

- **Communication is <u>key!</u>**
  - Maintain frequent communication at all approval levels and with the GSA Fleet Service Representative
  - Be prepared to provide an alternate selection if the preferred SIN or model becomes unavailable
  - Be proactive and flexible
    - This is a new process and a new system - work together!

New Request/Approval Process

FY25 Vehicle Request & Approval Process

What's the same?

- Multiple approval levels (optional to be used by agencies)
- Eligible tag lists shared with agencies prior to launch
- Users will have the ability to:
  - View agency guidance
  - Select vehicle type and SIN
  - Request options, colors, and specific fuel types
  - Add comments and upload documentation
  - Return for changes or send forward to next level
  - Filter on screen and export reports as needed

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FY25 Vehicle Request & Approval Process

What's new?

- Alternate approvers at each level (up to 2 at each level)
- Visibility of all requests scoped to your role on screen (regardless of status)
- Increased filtering capabilities
- Additional information on eligible replacement vehicle
- Enhanced vehicle/option selection functionality and ability to add option comments
- Requests returned and edited by the local customer will go back through the FSR for review prior to moving on to the Bureau/Agency level
- Daily notifications will NOT be provided to users
- Ability to track replacement vehicles from request through delivery via a reporting interface.

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Approval Hierarchy

New Leased Vehicle Approval Hierarchy

Initial FSR Review

For FY25, this was handled via spreadsheets and will be uploaded to GSAFleet.gov. Beginning in FY26, this process will be completed within GSAFleet.gov with the FSR selecting eligible vehicles and forwarding to the submitter for action.

Customer Fleet Manager

In CAM, this was the local customer. The Customer Fleet Manager will review the eligible vehicle and select the vehicle type, SIN, and options to meet their mission requirements. They should use their Agency Guidance when making their selection.

FSR Review

The replacement vehicle request will be routed to the assigned FSR for review. FSRs will compare the request to agency guidance and either approve and send forward or return to the Customer Fleet Manager for changes.

Bureau Level Approver

In CAM, this would have been equivalent to the Mid-level Approver and is optional to be utilized by agencies. The bureau level approver will review the vehicle request and either approve and send forward or return to the Customer Fleet Manager for changes.

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New Leased Vehicle Approval Hierarchy

Agency Level Approver

In CAM, this would have been equivalent to the HQ Level Approver and is optional to be utilized by agencies. The agency level approver will review the vehicle request and either approve and send forward or return to the Customer Fleet Manager for changes.

Approved at FSR

If your agency has selected to replace a vehicle, then 'Approved at FSR' is the final level of your approval process as a GSA leasing customer. Once approved, the FSR will review the vehicle request in its entirety and create a vehicle requisition. The FSR will contact the submitter if there are any issues ordering the vehicle as requested.

Order Submitted

The vehicle requisition will go through several more levels of review within GSA Fleet and then the order will be placed with the vehicle supplier. Customers will be able to track their replacement vehicle from request through delivery via a reporting interface.

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"Or" Approval Options at the Agency and Bureau Level

Ordering Approvers at each level

* Utilization of this functionality is optional

Agency/Bureau Approvers Tier

Primary Approver

OR

Alternate Approver 1

OR

Alternate Approver 2

Creating/Editing Vehicle Requests

- The following users will have the ability to create/edit vehicle requests when they are in referred or returned status:
  - Customer Administrator
  - Customer Fleet Manager (local level)
  - FSR
  - FMC Manager
  - Ordering Administrator

Note: Requests returned to the local level for changes will always be routed back through the FSR

Fleet Service Representative (FSR) Role

What is the FSR's initial role in the vehicle selection/approval process?

- Assist with finalizing eligible vehicles to be loaded into GSAFleet.gov

- Become familiar with agency guidance for the current acquisition cycle

- Discuss projected replacements and mission requirements with local customer

- Assist local customers with replacement vehicle selections as needed

Customer Fleet Manager Role

What is the local customers role in the vehicle selection/approval process?

- Review eligible replacement vehicles

- Determine how to proceed:

    - Select replacement vehicle type

    - Select 'Turn In without Replacement'

    - Select 'Do Not Replace this Year'

- Input all required information on the replacement vehicle selection

- Select options, colors, and input any special instructions

- Send vehicle selections to next level by established deadline

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Fleet Service Representative (FSR) Role

What is the FSR's role during review of initial vehicle selection?

- Review selections to ensure they comply with Agency Guidance
  - If yes, selections go to next approval level within the agency
  - If no, selections returned to local level for changes
- Enter comments if selections are returned– recommend changes to selection

Bureau Level Approver Role

What is the Bureau Level Approver role in the vehicle selection/approval process?

- Review vehicle replacement selections
- Determine how to proceed:
    - Approve and send to next level
    - Return to prior level for changes
- Enter detailed comments as needed
- Send all selections to next level by established deadline

Agency Level Approver Review

What is the Agency Level Approver role in the vehicle selection/approval process?

- Review vehicle replacement selections made by local customer
- Determine how to proceed:
  - Approve and send to next level
  - Return to prior level for changes
- Enter detailed comments as needed
- Send all selections to next level by established deadline

Fleet Service Representative (FSR) Role

What does the FSR do with approved vehicle selections?

- Review finalized vehicle selections
  - Carefully review mission essential options/colors/model requirements
  - View supplementary information and document uploads
  - Follow up with local customer as needed
- Create vehicle requisition
  - Requisition will be reviewed by multiple levels
  - Requisition transmitted to vehicle supplier for production

Request Status Descriptions

Below are the request statuses in order of workflow:

- **Referred** - Initial step in the request process where leasing customers select to replace, turn in without replacement, or do not replace this year.

- **FSR Review** - FSR reviews the request and either sends it forward, or returns to the local customer to make changes.

- **Bureau Review** - Bureau level approver reviews the request and either sends it forward, or returns to the local customer to make changes.

- **Agency Review** - Agency level approver reviews the request and either sends it forward, or returns to the local customer to make changes.

Request Status Descriptions

Below are the request statuses in order of workflow:

- **Agency Approved -** Applies to Turn in or Do Not Replace requests, and is the final status unless the request is re-opened.

- **Approved at FSR** - Applies to an approved replacement vehicle request, and is the final status before the FSR creates a requisition.

- **Returned** - Indicates that the request was returned to the local customer and it is now editable for changes to be made.

- **Requisition created** - Indicates that the FSR has created a requisition for the new vehicle.

Live Demo

Things to highlight

- Garage address will populate if entered into Customer Driven Data
  - Address fields can be edited as needed
  - If the vehicle requires delivery to a different city/state, input the delivery location into the 'Special Instructions' field and discuss with FSR
- Low GHG models will not be highlighted for FY25
  - Refer to the FY25 AFV Guide to identify SINs with low ghg options
  - FSRs will notify local customers if a low ghg model cannot be ordered

Things to highlight

- Approvers at all levels should closely review the:
  - agency guidance
  - new replacement vehicle request
  - supplementary information
  - document uploads
  - special instructions
- Requested options, colors, and make/model requirements are not guaranteed
  - FSR will contact local customer if changes are required

Helpful Tips

Helpful Tips

- Familiarize yourself with new GSAFleet.gov functionality
- Attend at least one Desktop Workshop session
- Work closely with your FSR on mission and requirements
- Review Agency Guidance/AFV Product Guide/Rate Bulletin
- Check GSAFleet.gov daily for required action
- Meet (or beat!) all established deadlines
- Review/approve vehicle selections as soon as they reach your level
- Attach documents pertinent to vehicle selection
- Post comments to communicate between approval levels/FSRs

Daily Automated Notifications

- Users and approvers will **NOT** receive daily automated email notifications from GSAFleet.gov each time a replacement vehicle request is forwarded to the next level
  - A future enhancement may allow users to turn on or off these types of notifications
- We recommend that users review GSAFleet.gov on a daily basis for replacement vehicle requests at their level that require action
- Email reminders will be sent to Bureau and Agency level approvers 1 week and 1 day before established deadlines from gsa.fleet.acquisition@gsa.gov

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Returned Request Notifications

- Primary Customer POC will receive auto generated email notification when a selection has been returned for their review/update

Vehicle request returned - G120150U

Vehicle request G120150U / 3FA6P0UU2JR101096 has been returned to you for your review. Please review the request and take appropriate action at your earliest convenience.

This is an automatically generated message from the General Services Administration. Replies are not monitored or answered.

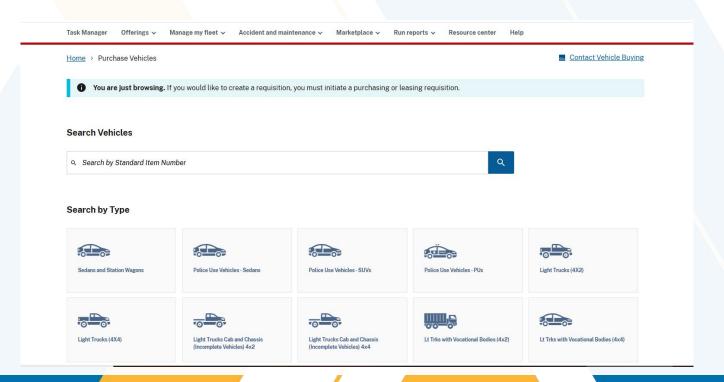GSAfleet.gov | fleet.helpdesk@gsa.gov

Resources

Helpful Links

- GSAFleet.gov
  - https://gsafleet.gov/

- GSA Federal Vehicle Standards:
  - https://catalog.gsafleet.gov/catalog/vehicle-standards

- Sign up for Vehicle Availability Listing (VAL) Updates
  - https://public.govdelivery.com/accounts/USGSAFLEET/subscriber/new?preferences=true#tab1

GSAFleet.gov 'Just Browsing'

Use this feature to:

— Search by SIN or browse by vehicle type

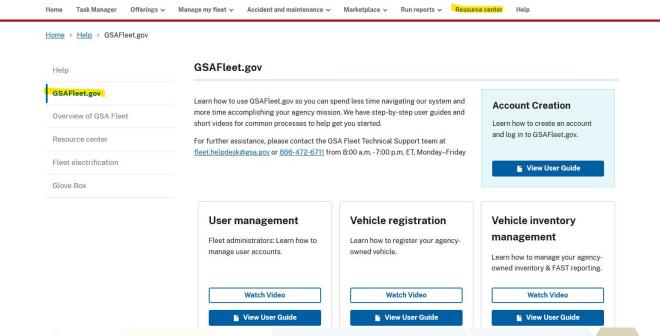— Check vehicle/option availability without placing an order

Helpful Links

- Find your FSR:
    - https://www.gsa.gov/buying-selling/products-services/transportation-logistics-services/vehicle-leasing/find-a-fleet-service-rep-fsr

- GSA Fleet Rate Bulletin:
    - https://www.gsa.gov/buying-selling/products-services/transportation-logistics-services/vehicle-leasing/vehicle-rates

- GSA Fleet Minimum Replacement Criteria:
    - https://www.gsa.gov/buying-selling/products-services/transportation-logistics-services/vehicle-leasing/important-fleet-publications

- GSA Fleet AFV Information:
    - https://www.gsa.gov/buy-through-us/products-and-services/transportation-and-logistics-services/fleet-management/fleet-electrification/alternative-fuel-vehicles

GSAFleet.gov Resources

Helpful resources include:

— GSAFleet.gov step-by-step user guides

— GSAFleet.gov short video tutorials

— Overview of GSA Fleet

— Training Offerings

— Fleet electrification info

— Glove box - driver information

Desktop Workshop Schedule

Date	Time	Session
01/14/2025	11:00 AM (ET)	Desktop Workshop #1
01/23/2025	3:00 PM (ET)	Desktop Workshop #2

View details and register HERE

Thank You!

- Session will be recorded and posted online

- Questions

  - Email gsa.fleet.acquisition@gsa.gov

Thanks for attending!!