

## SUBMITTING AN ANNUAL REPORT OVER THE INTERNET

If you are a covered state or alternative fuel provider fleet under the Energy Policy Act of 1992, you can submit your annual vehicle acquisition report over the Internet through DOE's EPAct web site, <http://www.eere.energy.gov/vehiclesandfuels/epact/>. Click on the State and Alternative Fuel Provider Regulation link on this page to get to the State and Alternative Fuel Provider page, and then click on File/Edit a Report to get to the reporting section (you can bookmark this page for quicker access next time).

You may use this site to:

1. submit or edit an annual report
2. review and print annual reports
3. register as a fleet Point of Contact (POC) and enter fleet into the database
4. edit fleet demographic data (address, etc.)
5. edit the fleet POC information.

### **User Names and Passwords for Fleet Points of Contact**

Each fleet in the database has one point of contact (POC) associated with it, and that POC must have a user name and password in the database to gain access to that fleet's annual report forms and data. A person may be the POC for more than one fleet. Regardless of the number of fleets a POC is associated with in the database, only one user name/password set is necessary for the POC to gain access to any associated fleet's forms or data.

### **ANNUAL REPORTS**

When you submit your annual report using the form on this web site, your data is directly entered into the EPAct State & Fuel Provider Compliance Database. Submission of your report triggers the calculation of your credits for the year and the effect of this year's credits on your cumulative banked credits. This data will be checked by the database administration team at Titan. They will contact you to confirm receipt of the report, and send you an official annual statement after checking the data you submitted.

### **Getting Into the Annual Report Screen**

When a POC enters a user name and password into the Fleet Database Access Form, a list of fleets appears for which the POC is registered (this is bypassed if the POC has only one fleet). The POC selects a fleet from the list to gain access to the reporting forms and report summaries for that fleet. Selecting the fleet brings up a form in which you must select the year for which you want to enter a new report, edit an existing report, or view/print an existing report. Selecting the year brings up the annual report form for your fleet for the chosen year. If you have not submitted a report for the year you selected, the form will be blank. If you have submitted a report for the chosen year, the form will contain the data you previously submitted.

### **Editing or Adding Annual Reports for Previous Model Years**

A reporting year encompasses the model year of the report and the following four months; for example, the 2001 reporting year runs from September 1, 2000 through December 31, 2001. You may enter an annual report for current reporting year(s), or for any previous reporting year for which you have not already submitted a report. **YOU MAY NOT EDIT ANNUAL REPORTS YOU HAVE SUBMITTED FOR PREVIOUS YEARS**, but you can view and print a summary of the report from the report form. **To change such a report, contact the database administration team at Titan with the changes you would like to make.**

### **Summary of the Steps to Add or Edit an Annual Report**

1. Having selected the fleet for which you want to add or edit a report (only for POCs with multiple fleets), select the model year of the report (ONLY CURRENT MODEL YEAR(S) MAY BE EDITED).
2. Enter (or edit the records of) the AFVs for which you want credit for your fleet for the selected model year.
3. Enter (or edit the fields containing) the total number of light duty vehicles (AFVs plus conventional vehicles) you acquired, the number of gallons of biodiesel you purchased, and the number of your banked credits you want applied to this year's credit calculation to achieve compliance.
4. Click on the "Submit Report" button to send the data to the database and trigger the calculation of your annual credits for the chosen year and your banked credits balance.
5. Click on the Refresh Screen button in the middle part of the form to see the effect of the year's report on your fleet's cumulative banked credit balance.
6. Select another year for which to submit or edit or get a summary of an annual report, or exit the form.

### **Using the Reporting Form**

You carry out the steps to add or edit an annual report using the reporting form that appears after you have selected the year for which you want to report. The annual report form comprises three sections from top to bottom. Depending on the size of your screen, each of the sections may have its own scroll bar on the right of the screen. You may need to use the scroll bar to see all of the data and buttons for a particular section.

#### Top Section

This section includes a list of years for which you can submit or view an annual report. The year you previously selected is highlighted, and if there is data in the database for that year for your fleet, it is presented in the middle and bottom sections of the form. Any data you enter into the middle and bottom sections of the form will be applied to the model year highlighted in this list. You may bring up the form for any model year on the list by selecting that year from this list. When you do so, the vehicles for that year will be displayed in the middle section, and, for current reporting years, the bottom section will contain that year's data (LDV count, etc.).

This section also presents the demographic and POC information for your fleet, as well as the fleet's current banked credit balance. You can **edit your fleet's demographic information** by clicking on the "Edit Fleet" button, or **edit your user information** (including your user name and password) by clicking the "Edit Fleet Manager Info" button.

#### Middle Section

You use the middle section of the form to add vehicles you want credited to the model year highlighted in the top section, or to edit vehicle information for vehicles previously entered for this model year (**as long as the selected year is a current reporting year**). This section includes a list of the AFVs currently in the database that are associated with your fleet for the chosen model year. If you are inserting a new report, the list box will be blank.

You can add a vehicle to the list or select a vehicle to edit its information (click the vehicle in the list to highlight it, then click on the EDIT button). Clicking on the Add, Edit, or Copy button brings up the vehicle data entry form (see section below for explanation of fields in the form). When you complete the data entry for a vehicle, submit the vehicle form by hitting the ADD button to enter the vehicle into the database (or the UPDATE button if editing a vehicle's information). Repeat this process until you have submitted all of the vehicles for this model year.

The "**Copy Vehicle**" button allows you to make a copy of the vehicle record you have selected from the list. If you have a vehicle to enter that is very similar to one already in the list, the Copy button allows you to make a copy of the existing record and just change those fields that are different for the new vehicle's record. Clicking on the ADD button on the vehicle form submits that vehicle data as a new vehicle record in the database.

The new or updated vehicle(s) will appear on the list of vehicles in the middle section of the annual report entry form when you hit the "**Refresh Screen**" button. When you complete entering your vehicles, you can proceed to the bottom section of the form to enter the other pertinent data for this model year. If you have already entered the other data, you still need to go to the bottom section of the form to press the "**Submit Report**" button. Pressing this button triggers a re-calculation of your fleets credits that includes counting the AFVs you just entered.

The form will not allow you to enter a vehicle that has an acquired date or conversion date that is outside of the allowable date range for this model year. When this happens, a message appears showing the model year to which credit for that vehicle belongs. The vehicle will not be entered into the database. You must enter this vehicle using the reporting form for the appropriate year (i.e., selecting the corresponding year from the list in the top section of the reporting form).

If you want to delete a vehicle record, you must contact the database administration team at Titan to do so.

#### Bottom Section

The bottom section of the screen lets you edit and enter the data on LDV count, biodiesel purchased, and banked credits you want to apply to this model year's calculation. When you hit the "Submit Report" button at the right of the screen, this data is sent to the database, triggering a calculation of your annual credit balance for the model year and your cumulative banked credit balance. The annual calculated credits appear in this bottom section of the form. You must insert a number (including zero if you did not acquire any non-excluded vehicles) into the LDV Count field to properly trigger these calculations.

#### **Results of Submitting the Report to the Database**

The resulting calculated credits for the year are shown on the screen that appears after you hit the "Submit Report" button. If the calculated credits total is negative, you need more credits for this year (more AFV acquisitions, biodiesel credits, or applied credits) to be in compliance for this year. If the annual calculated credits is greater than zero, you have earned extra credits that are added to your cumulative banked credit balance. To see the effect on your fleet's banked credits (at the top of this form), hit the "Refresh Screen" button in the Middle section of the form after you have hit the "Submit Report" button.

Hit the button, "Year xxxx Report," at the bottom of the screen to view a summary of the report for the year you just entered. Use your browser to print this report to your local printer. The report should fit on one page wide if you set the page to landscape, the side margins to 0.25 in., and the font size to 10.

#### **EXPLANATION OF MODEL YEAR**

In general, a model year runs from Sept. 1 through Aug. 31 (e.g., 1999 model year was Sept. 1, 1998 through Aug. 31, 1999). There are two exceptions to this general rule:

1. Early Years: Model year 1992 ran from October 24, 1992 through December 31, 1992. For other early years (years before acquisition requirements began - model year 1997 for all but

electric delay fleets, model year 1998 for electric delay fleets), the model year is coincident with the calendar year - Jan. 1 through Dec. 31.

2. Electric Delay Fleets: For electric delay fleets, model year 1998 (when their acquisition requirements began) runs from Jan. 1, 1998 through Dec. 31, 1998. Subsequent model years are the normal Sep. 1 through the next Aug. 31.

For Biodiesel Fuel Use Credits, the beginning of the initial model year (1999 model year) was statutorily set at November 14, 1998. Thus, the 1999 model year for the biodiesel fuel use credit runs from November 14, 1998 to August 31, 1999. Model years subsequent to this for the biodiesel fuel use credit, however, follow the normal September 1 to August 31 time frame.

#### **EXPLANATION OF THE LIGHT DUTY VEHICLE COUNT FIELD**

The total Light Duty Vehicles acquired during a model year is the total number of light duty vehicles (both conventional and alternative fueled vehicles) acquired (purchased or leased) by the fleet during the reporting model year and located within a CMSA/MSA. Only count those vehicles that are not excluded from coverage by EPA Act (e.g., non-light-duty vehicles and non-road vehicles are excluded from coverage). This number is used to determine the fleet's requirement for AFV purchases for this particular year.

For reports of AFVs purchased before the program requirements began (model years before 1997 for most fleets, before model year 1998 for electric delay fleets), the number in this field should be set to zero. Entry of a number greater than or equal to zero in this field is mandatory.

#### **EXPLANATION OF BIODIESEL PURCHASED FIELD**

Biodiesel Fuel Use Credits became available following the enactment of the Energy Conservation Reauthorization Act of 1998. The 1999 model year for use of the Biodiesel Fuel Use Credit runs from November 14, 1998 to August 31, 1999. In future model years, the availability of the Biodiesel Fuel Use Credit will run from September 1 through August 31.

The biodiesel fuel purchased for the given Model Year must be for use in vehicles with Gross Vehicle Weight Rating (GVWR) in excess of 8,500 lbs. Note that the biodiesel reported as purchased should be the net amount of biodiesel fuel purchased for use in vehicles in excess of 8,500 lbs. GVWR. Any biodiesel purchased and then sold to another party should not be included in Biodiesel purchased. Also report biodiesel purchased as neat, or 100%, biodiesel. If biodiesel was purchased as biodiesel blends of 20% or higher, only report the biodiesel portions of such blends (e.g., 2,250 gallons of B20 [blends of 20% biodiesel and 80% petroleum diesel] should be reported as 450 gallons of neat biodiesel). Biodiesel purchased in blends containing less than 20% biodiesel by volume are not eligible for the Biodiesel Fuel Use Credit.

The potential Biodiesel Fuel Use Credits are derived by dividing total Biodiesel Purchased by 450. This number is rounded down to the next whole number. For fleets that are not Biodiesel Fuel Providers, the actual number of Biodiesel Fuel Use Credits claimed cannot exceed 50 percent of total AFV purchase requirements (rounded down to the nearest whole number). For Biodiesel Fuel Providers the actual number of Biodiesel Fuel Use Credits claimed cannot exceed total AFV purchase requirements.

#### **EXPLANATION OF THE APPLIED CREDITS FIELD**

Fleets that acquire more AFVs than required in a given model year earn credits for these extra acquisitions. These are "banked credits" that can be applied by the fleet to meet their acquisition requirement in another year to attain compliance in that other year. Each credit applied serves as the equivalent of one AFV acquisition. You, of course, cannot apply more credits than your

banked credit balance, which is the sum of all extra credits acquired by your fleet for all model years.

## **VEHICLE INFORMATION**

This section describes the contents of the fields on the form you use to enter vehicle information.

**ID Number:** Number automatically assigned to the vehicle by the database.

**Internal ID:** Vehicle identifier for your use.

**Make:** The make/manufacturer of the AFV (e.g., Ford, Plymouth, Dodge). (Mandatory).

**Model:** The AFV's model name (e.g., Caravan, Taurus, Cavalier). (Mandatory).

**Model Year:** The year that the vehicle was manufactured (not the year that the vehicle was converted to an alternative fuel, if it is a converted vehicle). (Mandatory)

**Vehicle Category:** The type of vehicle that the AFV is (e.g., automobile, bus). Select one from the list. (Mandatory).

**VIN:** Vehicle Identification Number. This is a 17-character (alphanumeric) unique code assigned by the vehicle manufacturer. (Mandatory).

**Acquisition Date:** This is the date that the vehicle was purchased or otherwise acquired by your fleet. Please use the MM/DD/YYYY format to enter this data. (Mandatory).

**Conversion Date:** This is the date that the vehicle was converted to alternative fuels. For OEM vehicles (vehicles that were built as AFVs), leave blank. The law allows entry into the program only those vehicles that were converted within four (4) months from when they were acquired by the fleet. AFVs acquired before the program went into effect (Sept. 1, 1996) but after the law was passed (Oct. 24, 1992) are not subject to this requirement and are allowed in the program no matter when they were converted to alternative fuels. Please use the MM/DD/YYYY format to enter this data. (Mandatory for AFVs converted by your fleet).

**Fuel Type:** This is the type of alternative fuel that the vehicle is capable of using. Select one from the list. (Mandatory)

**Fuel Configuration:** There are four options for this field. (Mandatory).

Dedicated: a vehicle designed and engineered to operate solely on an alternative fuel.

Dual/Bi-fuel: a vehicle that can operate on two different fuels either separately (bi-fuel) or as a mixture (dual).

Flexible fuel: a vehicle that has a single fuel storage and combustion system that can be fueled with either a blended alcohol fuel, a traditional fuel, or any combination of the fuels.

Fuel Cell: a vehicle engineered to operate on fuel cell technology.

**Conversion Mode:** This field is used to indicate who converted the vehicle to alternative fuels. (Mandatory)

- (1) the vehicle was designed to operate on an alternative fuel by the original equipment manufacturer (OEM);
- (2) the vehicle was converted by other than present owner (Pcon); or
- (3) the vehicle was self-converted by the present owner (Scon).

**Weight Class:** This field is used to indicate whether or not the vehicle can be considered a light duty vehicle. A vehicle that weighs 8,500 pounds (Gross Vehicle Weight Rating - GVWR) or less is considered light duty. Vehicles that weigh more than 8,500 pounds GVWR are non-light duty vehicles. Select one from the list. (Mandatory)

**Zip Code:** This field is used to indicate the zip code of where the vehicle is garaged. If the fleet does not know the specific locations of a vehicle, enter the same zip code that was entered for the fleet. (Please provide if the information is available).

## **FLEET MANAGER/POINT OF CONTACT AND FLEET INFORMATION**

If you are already registered to use this or the previous web site as a Point of Contact/Fleet Manager for a fleet, you can edit your Point of Contact/Fleet Manager information (including your user name and password) by clicking the "Edit Fleet Manager Info" button in the top section of the annual report form described above. You can edit your fleet's demographic information by clicking on the "Edit Fleet" button in the top section of the annual report form. This brings up the fleet information form.

If you are currently registered as a Point of Contact/Fleet Manager for a fleet and you want to add a new fleet for which you will be the Point of Contact/Fleet Manager, click on the link, [Click here](#), in the Registered POCs Adding a New Fleet section of the Reporting Forms and Instructions page found at <http://www.eere.energy.gov/vehiclesandfuels/epact/state/reporting.shtml>.

If you have never registered to use this or the previous web site, and the fleet for which you want to report has never previously reported either online or otherwise, you can both register yourself as the POC and register the fleet as a covered fleet by clicking on the link, [Register a New Fleet](#), in the New Fleets section of the Reporting Forms and Instructions page found at <http://www.eere.energy.gov/vehiclesandfuels/epact/state/reporting.shtml>.

### **Fleet Manager/Point of Contact Information**

The following is a description of each field on the Fleet Manager information form. Those fields with a red asterisk next to the names are required fields - something must be entered before the form can be submitted.

**ID Number:** number automatically assigned by the database

**POC Name:** name of the fleet manager or other contact person at your organization. If DOE has any questions concerning this report, the POC will be contacted. (Mandatory)

**POC Address1, City, State, Zip:** address of the fleet's point of contact. (Mandatory).

**POC Phone:** Phone number for the fleet manager or other point of contact. (Mandatory).

**POC E-mail:** E-mail address of the fleet's point of contact. Although not mandatory, your email address is useful if you forget your user name or password. In this case, you can click a link on the login page that will automatically email your user name and password to this email address.

**POC Fax:** Fax number for the fleet's point of contact.

**User Name:** user name you need to gain access online to your fleet's data and forms. When you first enter your Fleet Manager data into the database (i.e., when the database record is initially created), this field is automatically populated. After that, you can change your user name using the Fleet Manager Info form available through the annual report form. (Mandatory)

**Password:** password you need to gain access online to your fleet's data and forms. The password must be 5 or more characters in length. (Mandatory)

### **Fleet Information**

The following is a description of each field on the Fleet information form. Those fields with a red asterisk next to the names are required fields - something must be entered before the form can be submitted.

**ID Number:** number automatically assigned to the fleet by the database.

**Fleet Name:** Company name, State Agency name or other identifier of the fleet submitting the report. This name should be reasonably descriptive; e.g., Providence Gas Distribution Fleet, Tennessee Department of Transportation). See following sections for more information. (Mandatory)

**Address1:** street address of the fleet. (Mandatory)

**Address2, Address3:** 2 additional lines to describe the fleet's street address.

**City, State, Zip Code:** additional fields needed to describe the fleet's address. (Mandatory)

**Fleet Type:** category of fleet to which your fleet belongs; four options are possible (Mandatory):

**State government organization**

**Alternative fuel provider**, which is a fuel provider whose principal business is producing, storing, refining, processing, transporting, distributing, importing or selling (wholesale or retail) any alternative fuel (other than electricity); or generating, transmitting, importing, or selling (wholesale or retail) electricity; or if that fuel provider produces, imports, or produces and imports (in combination), an average of 50,000 barrels per day or more of petroleum; and 30% or more of its gross annual revenues are derived from producing alternative fuels. A fuel provider is not covered if it is a fuel provider whose principal business is that of transforming alternative fuel into products that are NOT alternative fuels; or it is a fuel provider whose principal business is that of using alternative fuel as a feedstock or fuel in the manufacture of products that are NOT alternative fuels.

**Electric Utility Delay** has been approved (by DOE) for electric utility delay status. This is a fuel provider whose principal business is generating, transmitting, importing, or selling electricity, who intends to comply with this regulation by acquiring electric motor vehicles and had notified DOE by January 1, 1996 of its intention. These fleets have the option of delaying scheduled acquisitions until January 1, 1998.

**Biodiesel fuel provider** is a fuel provider whose "principal business" is producing, storing, refining, processing, transporting, distributing, importing or selling (wholesale or retail) biodiesel fuel where the term "principal business" means the largest sales-related gross revenue producing activity. If an organization derives a plurality of gross revenue from sales-related biodiesel fuels activity, then the organization's principal business is biodiesel fuels.

**Parent Organization:** Name of the parent company for fuel provider fleets or State for state fleets (e.g., AAA Gas Co., State of Tennessee), if applicable. See following sections for more information.

**Publicize Credit Balance:** Yes if you want your fleet name and phone number included on the publicly accessible list of those fleets possessing a positive banked credit balance.

**Internal Identifier:** A fleet identifier for your use.

### **Explanation of Fleet Name versus Parent Organization**

#### Parents and Subsidiaries/Affiliates

The responsible reporting party for the Program is the parent or holding company. The Program allows the parent company to choose to report for itself and all its subsidiary organizations, or to have each subsidiary report independently.

If the parent company reports for itself and all subsidiary organizations, the parent company should note this in the remarks section and identify the subsidiaries for which it is reporting. Conversely, if the parent company reports for itself only, the parent company is asked to ensure that each subsidiary, which has reporting requirements, reports independently.

To aid the Department in determining the parent/subsidiary relationship, reports should identify the parent company as the **Parent Organization Name** and the subsidiary company as the **Fleet Name** on the form.

#### States and State Agencies

The responsible reporting party for the Program is the State. The Program allows each State to choose to report for itself and all its agencies; or to have a central agency report for the majority of State vehicles and have the remaining agencies report independently; or to have each State agency report independently.

If the State reports for itself and all its agencies, the State should note this in the remarks section and identify the agencies for which it is reporting.

If a central agency is reporting for the majority of State vehicles, the central agency is asked to identify the agencies for which it is reporting and to identify the other State agencies for which reports are expected to be forthcoming.

If State agencies will be submitting reports independently, the State is asked to ensure that each agency that has reporting requirements submits a report of their AFV acquisitions.

To aid the Department in determining the parent/subsidiary relationship, reports should identify the State as the **Parent Organization Name** (e.g., State of Tennessee) and the state agency as the **Fleet Name** on the form (e.g., Tennessee Department of Transportation).