

FUEL TAX



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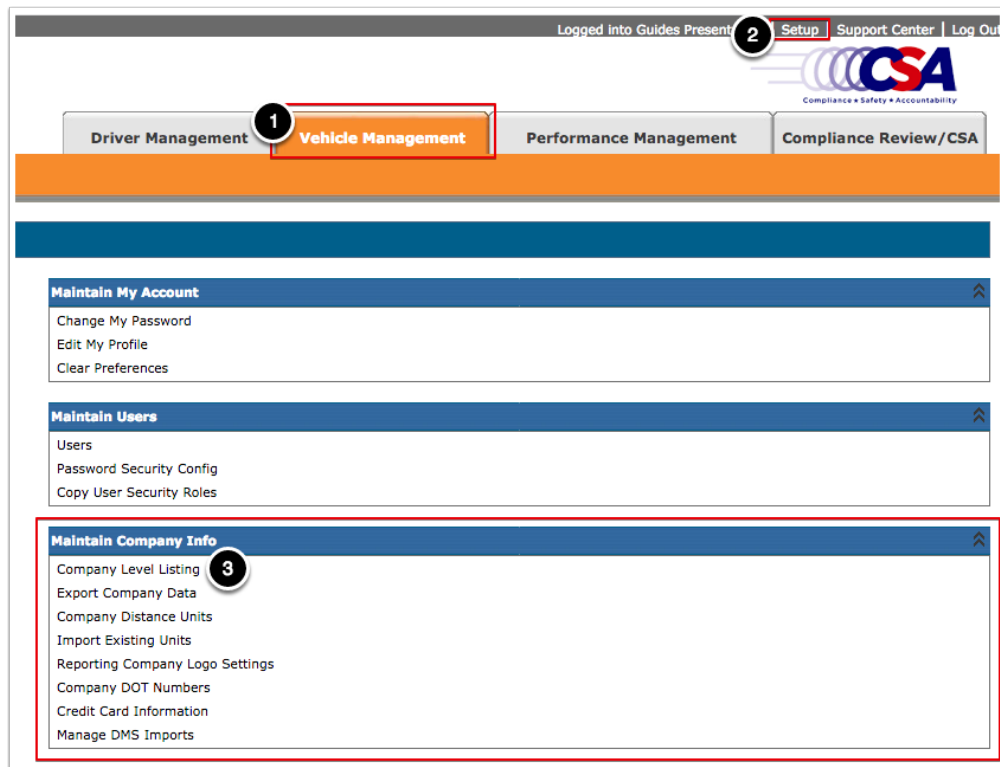
Setup

Vehicle Management > Setup

There are a number of settings the user should consider with regard to trip tracking - i.e., start and end odometers with each line entry, tracking costs associated with temporary permits or fuel, etc. These settings are adjusted by going to **Vehicle Management > Setup**. There are a few areas in Setup that should be addressed.

Company Level Listing

The first is at (1)Vehicle Management > (2)Setup > (3)Company Level Listing.



Once here, click on Edit Rules next to the company name.

Company Level Listing - BL Setup 1

Hierarchy Information

Modify your company hierarchy by building on the existing hierarchy below. To insert a new company level, click **Add Level**.

Cancel

BL Setup 1

Edit |

Edit Rules

 | Arrange

Add Level

Cancel

Scrolling down, there are two areas of interest: Fuel Tax Rules and Select the states that the unit reports mileage to.

Fuel Tax Rules

☒ Is IFTA Reportable?

☒ Is Included In Fleet MPG?

Select the states that the unit reports mileage to:

Select All

Unselect All

☐ KY - Kentucky

☐ NY - New York

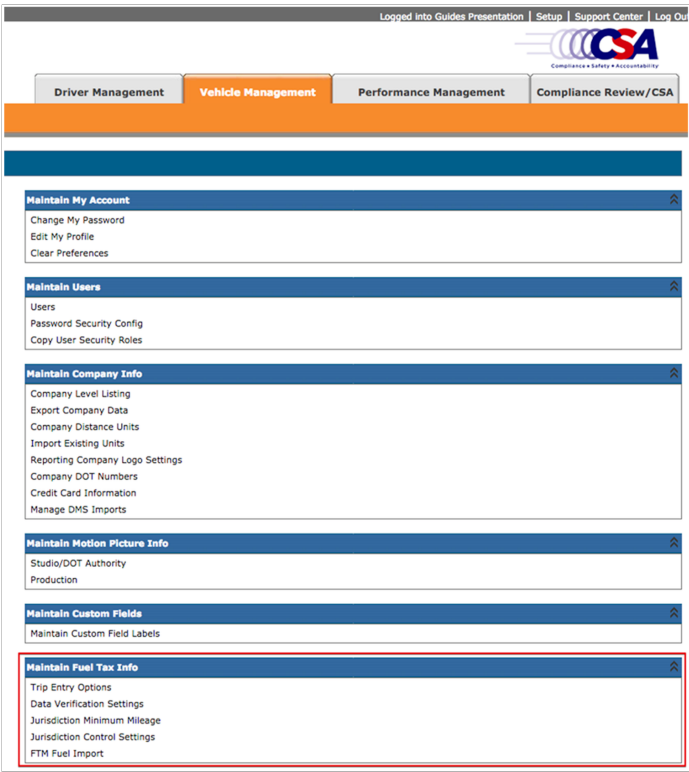
☐ NM - New Mexico

☐ OR - Oregon

If all vehicles of the appropriate vehicle types (more to come on this later) should be included in IFTA reporting, the Is IFTA Reportable box should be checked. Additionally, the vehicles that are IFTA reportable should be included in Fleet MPG. Therefore, either both boxes should be checked, or neither.

If any vehicles in the fleet travel through Kentucky, New York, New Mexico, or Oregon, then the respective check boxes should be selected under the header Select the states that the unit reports mileage to. This is due to the requirement to submit a mileage form separate from IFTA to those states.

The next area in setup that should be reviewed is the box titled **Maintain Fuel Tax Info**. The following will go through each of the areas within this section.



Trip Entry Options

Trip Entry Options allows the user to change certain input settings when adding a trip in Encompass.

View Trip Entry Options	
Settings Edit...	
Entry Options	
Start/End Odometers	Yes
Trip Line Odometers	Yes
Display Prev. Date & Odometer	Yes
Trip Line Dates	Yes
Toll Distance	Yes
Unladen Distance	Yes
Axle/Weight On Mileage Listing	Yes
Display Additional Fuel Field	Yes
Listings	
Fuel	Control
Mileage	Control
Trip Permit	Control

- **Start/End Odometers** - Enables/Disables fields to enter the start and end odometer readings for the entire trip.
- **Trip Line Odometers** - Enables/Disables the field to enter the odometer reading when they left the jurisdiction indicated on that trip line.
- **Display Prev. Date & Odometer** - Enables/Disables the date and ending odometer from the previous trip automatically filling in the date and start odometer of the current trip .
- **Trip Line Dates** must be set to **Yes** if manually entering in the trips or importing fuel from a fuel card.
- **Toll Distance** - Enables/Disables the field to enter **Toll Miles** for a jurisdiction on a trip line.
- **Unladen Distance** - This creates a checkbox on a trip line that, if it is checked, indicates that the mileage on that trip line was completed while unladen.
- **Axle/Weight On Mileage Listing** - Enables/Disables a field to enter number of axles and weight of the vehicle for an entered mileage listing.
- **Display Additional Fuel Field** - By default, each trip line has two fields for fuel to be entered. Having this set to **Yes** allows for three fields for fuel.
- If the user wants to add details for fuel purchases, trip permits, or mileage listings, the appropriate option at the bottom should be set to **Always**.

Data Verification Settings

Data Verification Settings are in place to help ensure the data that is entered is valid.

View Data Verification Settings

Settings

Edit...

⌵

Data Verification Options	
Jurisdiction to Jurisdiction Sequence	Yes
Minimum Distance Between Jurisdictions	Yes
Begin/End Trip Dates	Yes
Begin/End Trip Odometers	Yes
Minimum/Maximum MPG (or KPL)	Yes
Fuel Entered without Distance in Jurisdiction	Yes

- **Jurisdiction to Jurisdiction Sequence** - Enables/Disables the enforcement of the jurisdictions entered on a fuel tax trip be in geographical order - i.e. Wisconsin, Illinois, Missouri (not Illinois, Wisconsin, Missouri).
- **Minimum Distance Between Jurisdictions** - Enables/Disables a minimum mileage that can occur between two jurisdictions. These minimum mileage settings can be edited in **Jurisdiction Minimum Mileage** settings found in the next section.
- **Begin/End Trip Dates** - Enables/Disables start and end dates automatically populating based on the trips that have already been entered immediately before or after. As a validation, this checks that trips are entered with sequential dates.
- **Begin/End Trip Odometers** - Enables/Disables the enforcement that the end odometer of a trip must be the start odometer of the next trip.
- **Minimum/Maximum MPG (or KPL)** - Enables/Disables an alert from Encompass if the miles per gallon falls outside of the minimum/maximum MPG parameters provided by the **Unit Type**.
- **Fuel Entered without Distance in Jurisdiction** - Enables/Disables the ability to have a trip line with no odometer reading or miles and only fuel.

Jurisdiction Minimum Mileage

Jurisdiction Minimum Mileage determines what the minimum distance can be between jurisdictions. The enablement/disablement of this setting is in the Data Verification Settings > Minimum Distance Between Jurisdictions (see the prior section).

- The Minimum Mileage can be edited; the Default Minimum Mileage cannot.

View Jurisdiction Minimum Mileage

Select Jurisdiction From: Alabama

Select Jurisdiction To:

Jurisdiction Minimum Mileage		Edit...		
From	To	Through	Min Mileage	Default Min Mileage
Alabama	Arkansas	Mississippi	126	126
Alabama	Arkansas	Tennessee	132	132
Alabama	Florida	Georgia	19	19
Alabama	Georgia	Florida	1	1
Alabama	Georgia	Tennessee	1	1
Alabama	Kentucky	Tennessee	124	124
Alabama	Louisiana	Mississippi	72	72
Alabama	Mississippi	Tennessee	1	1
Alabama	Missouri	Tennessee	146	146
Alabama	North Carolina	Georgia	70	70
Alabama	North Carolina	Tennessee	76	76
Alabama	South Carolina	Georgia	152	152
Alabama	Tennessee	Georgia	4	4
Alabama	Tennessee	Mississippi	20	20
Alabama	Virginia	Tennessee	155	155

Jurisdiction Control Settings

Jurisdiction Control Settings show what the tax rates are for a given jurisdiction and work month. Additionally, this area is where **Bulk Fuel** can be enabled. To enable **Bulk Fuel**:

- Select the appropriate jurisdiction from the drop down at the top, then select **Edit** next to the **Listings & Bulk Fuel Tax Status** heading.
- Check the box under **Bulk** next to the appropriate fuel type and select the tax status of the gallons/liters being reported from the drop down.
- Click **Save**.

View Jurisdiction Control Settings

Select Jurisdiction: Alabama Tax Membership: IFTA

IFTA Tax Rates

Select Work Month: 8/2018

	United States		Canada	
Fuel Type	Tax Rate	Surtax	Tax Rate	Surtax
Diesel	0.1900	NA	0.0657	NA
Gas	0.1800	NA	0.0623	NA
LPG	0.1900	NA	0.0657	NA
Natural Gas (CNG)	0.0000	NA	0.0000	NA
Gasohol	0.1800	NA	0.0623	NA

Listings & Bulk Fuel Tax Status Edit...

Fuel Type	Fuel	Bulk	Miles	Bulk Fuel Tax Status
Diesel	No	Yes	No	Tax Paid
Gas	Yes	No	No	Tax Not Paid
LPG	Yes	No	No	Tax Not Paid
Natural Gas (CNG)	No		No	None
Gasohol	No		No	None

Account Number:
Toll: None

Edit Jurisdiction Control Settings

Save Cancel

Alabama Control Settings

Fuel	Bulk	Miles	Bulk Fuel Tax Status
Diesel	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Tax Paid
Gas	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Tax Not Paid
LPG	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Tax Not Paid
Natural Gas (CNG)	<input type="checkbox"/>	<input type="checkbox"/>	None
Gasohol	<input type="checkbox"/>	<input type="checkbox"/>	None

Account Number:

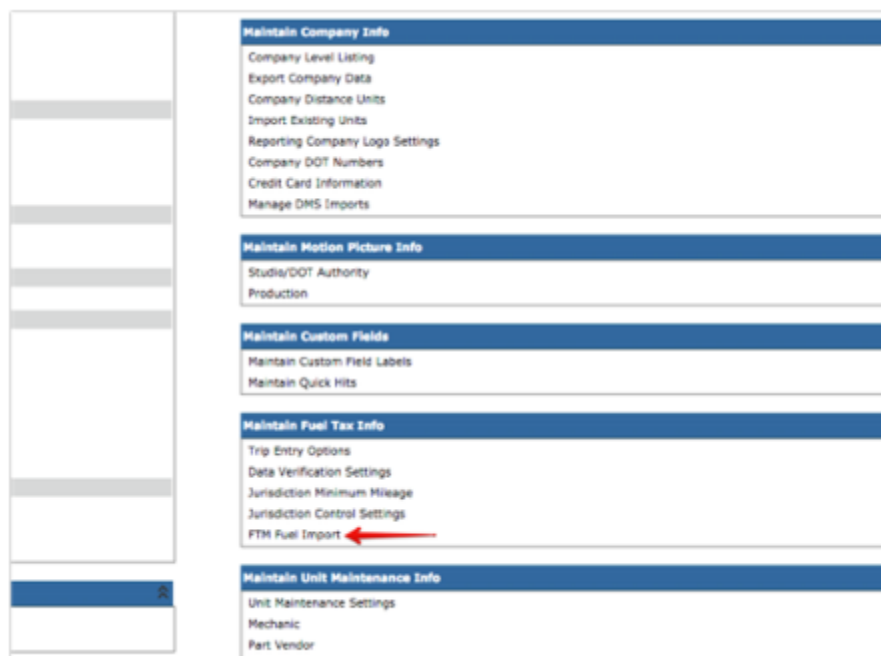
Save Cancel

FTM Fuel Import

In order for the import to work, the data file provided by the fuel card provider must meet these requirements:

- Fixed length text file. Excel spreadsheets, CSV files, or tab-delimited files will not work.
- All fuel purchases must be set to the same time zone in the file.
- Unit Codes must be identical between Encompass and the data file.
- Dates and times cannot include any punctuation (Ex: 08222018 = good, 08/22/2018 = bad).
- Data must include
 - Unit Code
 - Date of Purchase
 - Time of Purchase
 - City of Purchase
 - State of Purchase
- Unit number MUST be identified on each fuel transaction (only having the driver will not be sufficient).








Once a data file meeting these requirements is received from the fuel card provider, a schema specific to the fuel import file must be established via **Vehicle Management > Maintain Fuel Tax Info > FTM Fuel Import > Add New...**



After obtaining the import file and creating the schema, or for help setting up the import, contact Encompass Client Services at 1-800-327-1342.

Vehicle Management > Units

In order for Encompass to properly track trips and report out data, the Units must be set up correctly. First, the Unit must be considered a Commercial Motor Vehicle, or CMV, in Encompass. This is done by the **Unit Type** field in the Unit file.

General Information	
Unit Code	Truck 1
Description	
Location	
Primary VIN	
Secondary VIN	
Unit Type	Truck-Tractor   
Make	(Not Specified)  
Model	
Model Year	
Acquisition Date	
Activation Date	8/23/2018 
Disposition Date	
Operational Status	
Towed Unit Type	
Company Level	Guides Presentation 
Purchase Price	
Fleet	

To classify the unit as a CMV, one of the following Unit Types must be selected:

- EH - Equipment Hauler
- RT - Road Tractor
- TK - Truck
- TK - Truck (single)
- TR - Tractor
- TT - Truck Tractor
- W - Wrecker

When one of these Unit Types are selected, a number of fields become required on the unit file. They are indicated in **red**.

State Information	Unit Specifications	Weights Information
License State <input type="text"/>	Distance Unit <input type="text" value="Miles/Gallons"/>	Unladen Weight <input type="text"/>
License Plate Number <input type="text"/>	Number of Axles <input type="text" value="(Not Specified)"/>	Weight (Other) <input type="text"/>
Plate Expiration Date <input type="text"/>	Fuel Type <input type="text" value="(Not Specified)"/>	Permitting Weight <input type="text" value="(Not Specified)"/>
Title State <input type="text"/>	Beginning Odometer <input type="text"/>	Gross Weight <input type="text"/>
Title Number <input type="text"/>	Current Odometer <input type="text"/>	Combined Gross Weight <input type="text"/>
County (unit resides in) <input type="text"/>	Date of Last Odometer Reading <input type="text"/>	
Apportioned Tag Number <input type="text"/>	Beginning Hour Meter <input type="text"/>	
Tag Expiration Date <input type="text"/>	Current Hour Meter <input type="text"/>	
IFTA Base Jurisdiction <input type="text" value="Wisconsin"/>	Date of Hour Meter Reading <input type="text"/>	
	Default MPG <input type="text"/>	
	Capacity <input type="text"/>	
	Is Reefer Equipped? <input type="checkbox"/>	
	Is PTO Equipped? <input type="checkbox"/>	
	Number of Cylinders <input type="text"/>	
	Has Glider Kit? <input type="checkbox"/>	
	Is Lift Axle Equipped? <input type="checkbox"/>	
	Is 2-Axle Truck With 5th Wheel? <input type="checkbox"/>	
	Is Intra State Unit? <input type="checkbox"/>	
	Is Unit Hauling Logs? <input type="checkbox"/>	
	Is Unit Hauling Household Goods? <input type="checkbox"/>	

- IFTA Base Jurisdiction - Where main business location is located
- Distance Unit - miles or kilometers
- Fuel Type - i.e., Diesel, Gas, etc.
- # of Axles
- Unladen Weight - Weight of ONLY the vehicle
- Gross Weight - Weight of the vehicle PLUS trailer
- Combined Gross Weight - Weight of the vehicle PLUS fully-loaded trailer, i.e., maximum weight

Note: Above the Save button on this screen, there are two options for Fuel Tax Entry which applies only to users that are manually entering in their trips. The settings here apply to this vehicle only. If these settings should be applied to the entire company, please see pages 6 and 7.

Fuel Tax Information

Start / End
Odometers

☒

Trip Line
Odometers

☒

Once these pieces of data are complete on the unit file, click Save.

Save

Cancel

Save & Add New

Once the vehicle information is saved, there are additional areas to look at. While in the View Unit screen, scroll down to the Rule Information section.

This section only needs to be edited if particular units operate differently than what is set in the Company Level settings.

View Unit - 1

Unit Information

Edit...

Code

1

Company Level

BL Setup 1

Description

Heavy Hauler

Location

Unit Type

Truck-Tractor

Permitting Weight

(Not Specified)

Gross Weight

30000

Combined Gross Weight

80000

Make

Peterbilt

of Axles

3

Model

Model Year

2014

Primary VIN

1BND99302NVK

Secondary VIN

Activation Date

9/10/2008

Acquisition Date

9/10/2008

Disposition Date

Disposition Reason

Beginning Odometer

Beginning Hour Meter

Current Odometer

327318

Current Hour Meter

Date of Last Odometer Reading

9/4/2018

Date of Last Hour Meter Reading

Purchase Price

Default MPG

IFTA Base Jurisdiction

Wisconsin

Distance Unit

Miles/Gallons

Fleet

Operational Status

License State

Plate Expiration Date

License Plate #

Title Number

Title State

Tag Expiration Date

Apportioned Tag

Rule Information

Edit...

Rule Type:

BL Setup 1

Is required to meet DOT qualifications?

Yes

Is IRP?

Yes

States Traveled:

Is IFTA Reportable?

Yes

Is Included In Fleet MPG?

Yes

States Mileage Reportability:

Max Acceptable Tachometer (RPM)

1800.0

Max Acceptable Speed (MPH)

65.0

Hard Brake Deceleration (MPH in 1 second)

7.0

Days Before Not Utilized

30

Average Idle Time per day of operation (Min)

30.0

Target Fuel Economy (MPG)

6.00

Is Unit Performance Reportable?

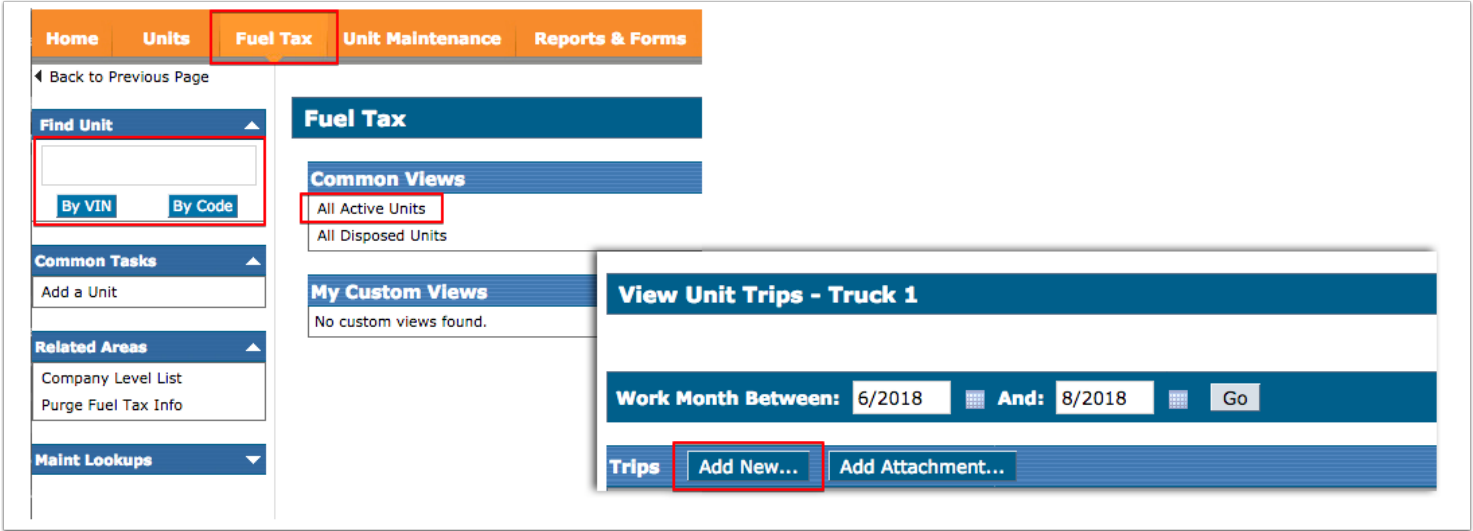
Yes

The check boxes Is IFTA Reportable and Is Included in Fleet MPG are the same as the ones found in Setup > Company Level Listing > Edit Rules (see page 5). **NOTE: This setting at the vehicle level supersedes the settings at the company level.** This means that if the check boxes for Is IFTA Reportable and Is Included in Fleet MPG are checked at the company level, but unchecked at the vehicle level, that particular vehicle will NOT be included in IFTA or Fleet MPG.

Manually Adding Fuel Tax Trips and Listings

Adding Fuel Tax Trip

From the Fuel Tax tab in Vehicle Management, find the unit the trip should be added to. This can be done by entering in the unit code or VIN in the search box on the left, or by clicking on All Active Units and finding the desired unit. Click on the unit code, and then click Add New...



Add a Trip

Add Trip - Truck 1

Shaded Fields are Required

Edit Listings

Save

Cancel

Save & Add New

Trip Information

Work Month

8/2018

Trip Number

Generate Trip Number

Odometer Start

Odometer End

Trip Incomplete

☐

Miles

0

Gallons

0

MPG

0.00

Under Trip Information (all fields marked in Red are required):

- **Work Month** is the month in which the trip occurs.
- **Trip Number** needs to be unique. **Generate Trip Number** can also be used to have the system create one.
- **Odometer Start** will show the previous odometer reading if this option is enabled in Trip Entry Options. If not, enter the starting odometer reading.
- Enter the **Ending Odometer**.
- **Trip Incomplete** check box is used when data has been entered but not the entire trip. This tells the system to not verify the data until that box is unchecked.
- **Miles**, **Gallons**, and **MPG** are automatically calculated based on the information entered in the trip lines below.

Manually Adding Fuel Tax Trips and Listings

Fuel Codes: Gallons/Liters & Receipted/Non Receipted/Tax Paid Bulk/Tax Not Paid Bulk/Bulk/Reefer. 1

ST/Prov	Date	Odometer	Nontoll	Toll	Total	E	Fuel #1	Fuel #2	Fuel #3	Ins	Del
	8/27/2018					<input type="checkbox"/>					
						<input type="checkbox"/>					
						<input type="checkbox"/>					
						<input type="checkbox"/>					
						<input type="checkbox"/>					
						<input type="checkbox"/>					
						<input type="checkbox"/>					
						<input type="checkbox"/>					
						<input type="checkbox"/>					
						<input type="checkbox"/>					

Data Verification

[Edit Listings](#) [Save](#) [Cancel](#) [Save & Add New](#)

Adding the trip lines:

- Select the appropriate **State/Province** code from the drop down menu in which the mileage was traveled.
- If the setting was enabled in the settings, the **Date** will automatically fill, otherwise enter the date in which the mileage occurred
- Enter the **Odometer** reading as it was when the vehicle started driving in that jurisdiction. **Nontoll** miles will automatically populate. If there are any **Toll** miles, those would be entered in the next column. The **Total** will then be automatically calculated.
- If the mileage was done while empty, or unladen, check the box under **E** to indicate this.
- **Fuel:** Any fuel purchased in the jurisdiction can be entered under **Fuel #1**, **Fuel #2**, and **Fuel #3**. See the **Fuel Codes** directly above the entry grid (1). The system defaults to **Gallons/Liters Receipted (GR/LR)**, but there are a number of other fuel codes that can be used. Each fuel code will contain **two letters**; first **G** or **L** depending on the unit of measurement being used (gallons or liters) and second, the type of fuel being purchased:
 - **R - Receipted:** Should be used if there is proof of purchase, i.e. a receipt.
 - **N - Non Receipted:** Should be used if there is no proof of purchase, i.e. no receipt (**Note:** Any fuel labeled as Non Receipted will NOT be included for IFTA tax credits but will be used to calculate Fleet MPG).
 - **P - Tax Paid Bulk:** Should be used for bulk fuel in which tax was already paid (**Note:** Any fuel labeled as Tax Paid Bulk will be included for IFTA tax credit).
 - **T - Tax Not Paid Bulk:** Should be used for bulk fuel in which tax has not been paid.
 - **B - Bulk:** This one isn't suggested for use - it is shorthand and will automatically change to **P** (Tax Paid Bulk) or **T** (Tax Not Paid Bulk) once the trip is saved. Use either **P** or **T** instead.
 - **F - Reefer:** Should be used if fuel is Reefer fuel and subject to rebate (**Note:** This would not be used for IFTA as Reefer fuel isn't subject to IFTA, but would be used for tracking purposes instead).
 - **Note:** This field is only for the amount of fuel purchased. See the following pages for instructions on how to add more detail regarding the fuel purchase.

Manually Adding Fuel Tax Trips and Listings

- If additional lines are needed, click **Ins** toward the right to insert a new line. If a line needs to be removed, click **Del** to remove the line.
- Click **Save** to finish, or **Save & Add New** to save the information and display a blank *Add Trip* screen.

When saved, the data is verified per the settings in **Data Verification Settings** under Setup. Any errors will show up in **Red**.

Adding Fuel Receipt to Fuel Tax Trip

Once fuel has been added to a fuel tax trip, details about the purchase can be added. To do this, click **Edit Listings** at either the top or the bottom of the **Edit Trip** page.

Edit Trip - Truck 1

Shaded Fields are Required

Edit ListingsSaveCancel

Trip Information

Work Month

8/2018

Trip Number

20180827

Odometer Start

0

Odometer End

200

Trip Incomplete

Miles

200

Gallons

100

MPG

2.00

Fuel Codes: Gallons/Liters & Receipted/Non Receipted/Tax Paid Bulk/Tax Not Paid Bulk/Bulk/RecFer.

ST/Prov	Date	Odometer	Nontoll	Toll	Total	E	Fuel #1	Fuel #2	Fuel #3		
WI	8/27/2018	50	50		50		100GR			Ins	Del
IL	8/27/2018	100	50		50					Ins	Del
IA	8/27/2018	180	80		80					Ins	Del
WI	8/27/2018	200	20		20					Ins	Del
										Ins	Del
										Ins	Del
										Ins	Del
										Ins	Del
										Ins	Del
										Ins	Del

Data Verification

Edit ListingsSaveCancel

Add Fuel Listing

Edit Trip LinesSaveCancel

Trip Number - 20180827

Fuel Listings

Line #	State	Fuel #	Fuel Amt	Entered As	Date	Vendor Name	City	Cost	Invoice #
1	WI	1	100G	Received	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Each field for the fuel listing is *required*.

- **Date** - Enter the date of the purchase or use the calendar next to the field to select the date of purchase
- **Vendor Name** - Enter the name of the fuel vendor
- **City** - Enter the city where the fuel purchase occurred
- **Cost** - Enter the *total cost* of the fuel purchase (NOT the price per gallon/liter)
- **Invoice #** - Enter the invoice number from the fuel receipt

Once these details have been entered, click **Save**.

Adding Trip Permit Listings

Temporary permits that have been purchased can be added to the trip. Many jurisdictions allow you to deduct the miles operated under, or the taxes paid on, a temporary permit or allow you to take credit for fuel purchases while operating under the permit.

To add this to the fuel tax trip in Encompass, click **Edit Listings** at either the top or the bottom of the **Edit Trip** page.

Edit Trip - Truck 1

Shaded Fields are Required

Edit ListingsSaveCancel

Trip Information

Work Month

8/2018

Trip Number

20180827

Odometer Start

0

Odometer End

200

Trip Incomplete

Miles

200

Gallons

0

MPG

0.00

Fuel Codes: Gallons/Liters & Receipted/Non Receipted/Tax Paid Bulk/Tax Not Paid Bulk/Bulk/ReeFer.

ST/Prov	Date	Odometer	Nontoll	Toll	Total	E	Fuel #1	Fuel #2	Fuel #3		
WI	8/27/2018	50	50		50					Ins	Del
IL	8/27/2018	100	50		50					Ins	Del
IA	8/27/2018	180	80		80					Ins	Del
WI	8/27/2018	200	20		20					Ins	Del
										Ins	Del
										Ins	Del
										Ins	Del
										Ins	Del
										Ins	Del
										Ins	Del

Data Verification

Edit ListingsSaveCancel

Trip Permit Listings

Trip Permit Listings										
Line #	State	Miles	Date	Permit Cost	Receipt #	Tax Fuel	Tax Mileage	Apply Fuel	Apply Mileage	
1	WI	50	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	
2	IL	50	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	
3	IA	80	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	
4	WI	20	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	

There will be a line for each trip line from the trip entry screen.

- **Date** - Enter the date or use the calendar next to the field
- **Permit Cost** - Enter the fee charged by the jurisdiction for the trip permit
- **Receipt #** - Enter the receipt number for the trip permit
- **Tax Fuel** - Applies to the jurisdictional fuel tax paid on the trip permit. If a specific tax was not paid, do not enter a value in this field
- **Tax Mileage** - Applies to jurisdictional mileage tax paid on the trip permit. If a specific tax was not paid, do not enter a value in this field
- **Apply Fuel** - Choose this if the trip permit enabled operations that are assessed a fuel tax
- **Apply Mileage** - Choose this if the trip permit enabled operations that are assessed a mileage tax

Once the details are entered, click **Save**.

Add Mileage Listings

Mileage listings may be required to be sent with tax reports in some jurisdictions. To add the mileage listing to a fuel tax trip, click **Edit Listings** at either the top or the bottom of the **Edit Trip** page.

Edit Trip - Truck 1

Shaded Fields are Required

Edit ListingsSaveCancel

Trip Information

Work Month8/2018

Trip Number20180827

Odometer Start0

Odometer End200

Trip Incomplete☐

Miles200

Gallons0

MPG0.00

Fuel Codes: Gallons/Liters & Receipted/Non Receipted/Tax Paid Bulk/Tax Not Paid Bulk/Bulk/ReeFer.

ST/Prov	Date	Odometer	Nontoll	Toll	Total	E	Fuel #1	Fuel #2	Fuel #3		
WI	8/27/2018	50	50		50	<input type="checkbox"/>				Ins	Del
IL	8/27/2018	100	50		50	<input type="checkbox"/>				Ins	Del
IA	8/27/2018	180	80		80	<input type="checkbox"/>				Ins	Del
WI	8/27/2018	200	20		20	<input type="checkbox"/>				Ins	Del
						<input type="checkbox"/>				Ins	Del
						<input type="checkbox"/>				Ins	Del
						<input type="checkbox"/>				Ins	Del
						<input type="checkbox"/>				Ins	Del
						<input type="checkbox"/>				Ins	Del
						<input type="checkbox"/>				Ins	Del

Data Verification

Edit ListingsSaveCancel

Mileage Listings

Line #	State	Miles	Date	Entry City	Exit City	Highways	Axles	Gross Weight
1	WI	50	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2	IL	50	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3	IA	80	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
4	WI	20	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[Edit Trip Lines](#) [Save](#) [Cancel](#)

There will be a line for each trip line from the trip entry screen.

- **Date** - The trip line date is displayed. If this date is not correct, enter the new date or use the calendar next to the field
- **Entry City** - Enter the city closest to the entry point of the trip line jurisdiction
- **Exit City** - Enter the city closest to the exit point of the trip line jurisdiction
- **Highways** - Enter the major highways operated on in the jurisdiction
- **Number of Passengers** - Enter the total number of passengers for this trip line (Displayed only if the vehicle type for this unit is **Charter Bus**, or **Non Charter Bus**)
- **Axles** - Enter the total number of axles in the combination for this trip line
- **Gross Weight** - Enter the combined gross weight for the unit on this trip line (maximum weight of vehicle with truck and trailer fully loaded)

Once the details are entered, click **Save**.

Fuel Tax Trips and Fuel Purchases from Keller Mobile

Fuel Tax Trips and Fuel Purchases in Encompass Submitted from Keller Mobile

When Keller Mobile and the ELD is used with Encompass, fuel tax trips can automatically be generated from the GPS data that the ELD collects. When Encompass generates a trip from Keller Mobile, the trip will look like the image below.

- The trip number will always be in the format YYYYMMDD-1 (see image below).
- Trips do not show up in Encompass in real time, nor when the driver submits their logs. Instead, this process runs overnight for Encompass to show the previous day(s).

20180904-1	09/18	75	55	No	BL Setup 1	Edit	Del
------------	-------	----	----	----	------------	------	-----

While trips don't show up immediately when the driver submits their logs, the information is sent to Encompass from Keller Mobile. If fuel tax data is missing for a unit, the first thing to check is whether or not the driver is/was connected to the ELD and whether or not they have internet connection.

Click on the trip number to see the trip details. Additionally, if the driver entered a fuel receipt with all necessary and correct information, the fuel will show up on the trip under **Fuel Listings**.

Unit Information Edit...

Code: 1 Company Level: BL Setup 1

IFTA Base Jurisdiction: Vehicle Type: (Not Specified)

Fuel Type: (Not Specified)

Trip Information Edit...

Trip Number: 20180904-1 Miles: 75

Work Month: 09/18 Gallons: 55

Trip Incomplete: No MPG: 1.36

Trip Line Information Edit...

ST/Prov	Odom	Non Toll	Toll	Total	Permit	Mileage
WI	327243	75	0	75	No	No

Fuel Listings

ST/Prov	Trip Line #	Fuel #	Amount	Date
WI	1	1	55GN	9/7/2018

Trip Permit Listings

ST/Prov	Trip Line #	Date	Tax Fuel	Tax Mileage	Miles Apply Fuel	Miles Apply Mileage
---------	-------------	------	----------	-------------	------------------	---------------------

Mileage Listings

ST/Prov	Trip Line #	Date	Entry City	Exit City	Highways
---------	-------------	------	------------	-----------	----------

Trip Notes Add New...

Name	Date
------	------

Trip Attachments Add New...

Attachment Name	Date
-----------------	------

Fuel Tax Trips and Fuel Purchases from Keller Mobile

To make sure that all wanted details are accurate or have been added for the fuel purchase, the detail can be reviewed by clicking on **Edit** next to the **Trip Line Information** heading. Then, on the following screen, click **Edit Listing** on either the top or the bottom of the page. Enter in any missing information on the Fuel Listings line, and click **Save**.

Edit ListingsSaveCancel

Trip Information

Work Month

9/2018

Trip Number

20180904-1

Odometer Start

327243

Odometer End

327318

Trip Incomplete

☐

Miles

75

Gallons

55

MPG

1.36

Fuel Codes: Gallons/Liters & Receipted/Non Receipted/Tax Paid Bulk/Tax Not Paid Bulk/ReeFer.

ST/Prov	Odometer	Nontoll	Toll	Total	Fuel #1	Fuel #2		
WI	327243	75		75	55GN		Ins	Del
							Ins	Del
							Ins	Del
							Ins	Del
							Ins	Del
							Ins	Del
							Ins	Del
							Ins	Del
							Ins	Del
							Ins	Del

Data Verification

Edit ListingsSaveCancel

Edit Trip - 1

Edit Trip LinesSaveCancel

Trip Number - 20180904-1

Fuel Listings

Line #	State	Fuel #	Fuel Amt	Entered As	Date	Vendor Name	City	Cost	Invoice #
1	WI	1	55G	Non-Receipted	9/7/2018			\$5.00	

Trip Permit Listings

Line #	State	Miles	Date	Permit Cost	Receipt #	Tax Fuel	Tax Mileage	Apply Fuel	Apply Mileage
--------	-------	-------	------	-------------	-----------	----------	-------------	------------	---------------

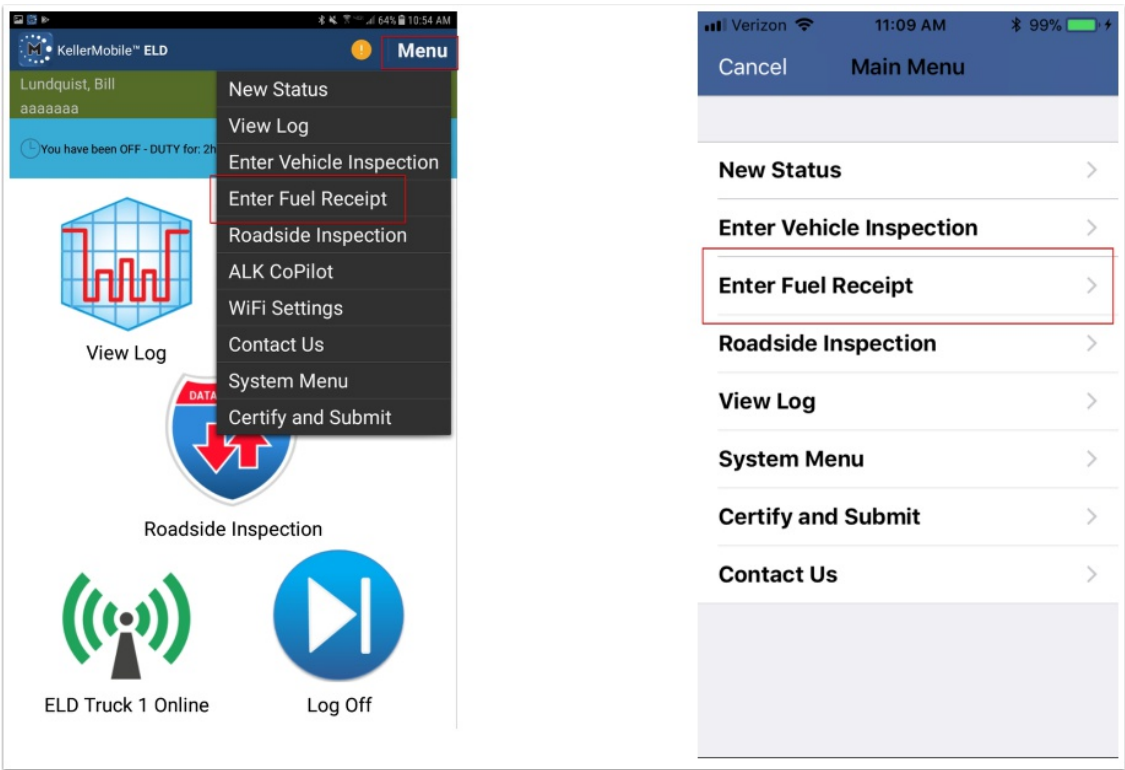
Mileage Listings

Line #	State	Miles	Date	Entry City	Exit City	Highways
--------	-------	-------	------	------------	-----------	----------

Edit Trip LinesSaveCancel

Entering Fuel in Keller Mobile & Assigning Fuel Receipts in Encompass

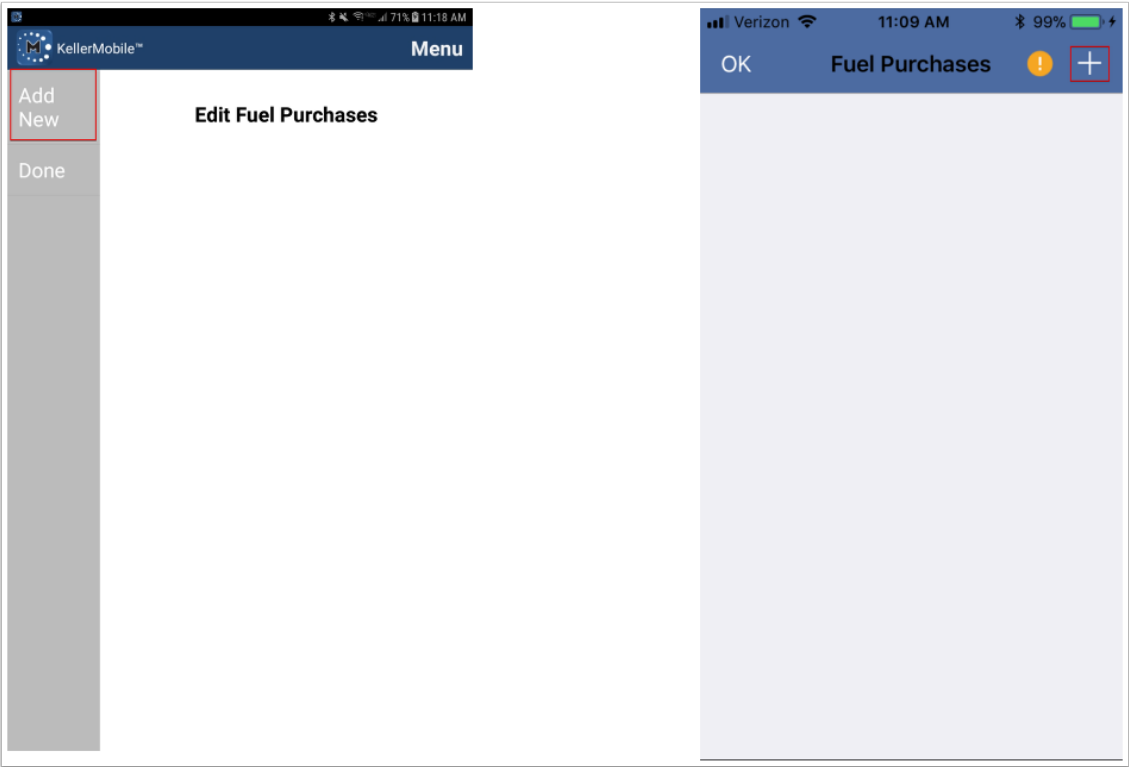
To enter a fuel receipt in the mobile app, go to **Menu > Enter Fuel Receipt**.



Fuel Tax Trips and Fuel Purchases from Keller Mobile

This screen will display any existing fuel purchases that have not been submitted to Encompass yet. This screen is also where a new fuel receipt can be added.

On Android™ devices, select **Add New** on the left hand side to add a new fuel receipt; on iPhone® and iPad® devices, select the **Plus Sign** on the upper right hand side.



Enter the amount of fuel that was purchased. If the value should be in liters as opposed to gallons, tap on Gallons and change it to Liters.

Note: The value entered here should not contain decimals. Gallons/Liters should be rounded to the nearest whole number.

Enter the two state abbreviation of the state in which the fuel was purchased (ex: WI)

If Keller Mobile is connected to the ELD, the **Vehicle Number** should automatically populate the tractor number. If the ELD is **disconnected** from the Keller Mobile™ app, this field should be blank in which the driver will need to enter in the Vehicle Number. **Important:** If the driver needs to manually enter in the vehicle number, it must match exactly what the vehicle number is, otherwise it will come into Encompass as an **Unassigned Fuel Purchase** (see page 35 of this guide on how to handle these).

Press OK.

KellerMobile™Menu

Add Fuel Purchase

Amount of Fuel

Gallons

State Code

Vehicle Number

Truck 1

OK

Cancel

123

456Next

789.

0

Verizon11:09 AM99%

CancelAdd Fuel PurchaseOK

Amount of Fuel

RequiredGallons >

State Code

Required

Vehicle Number

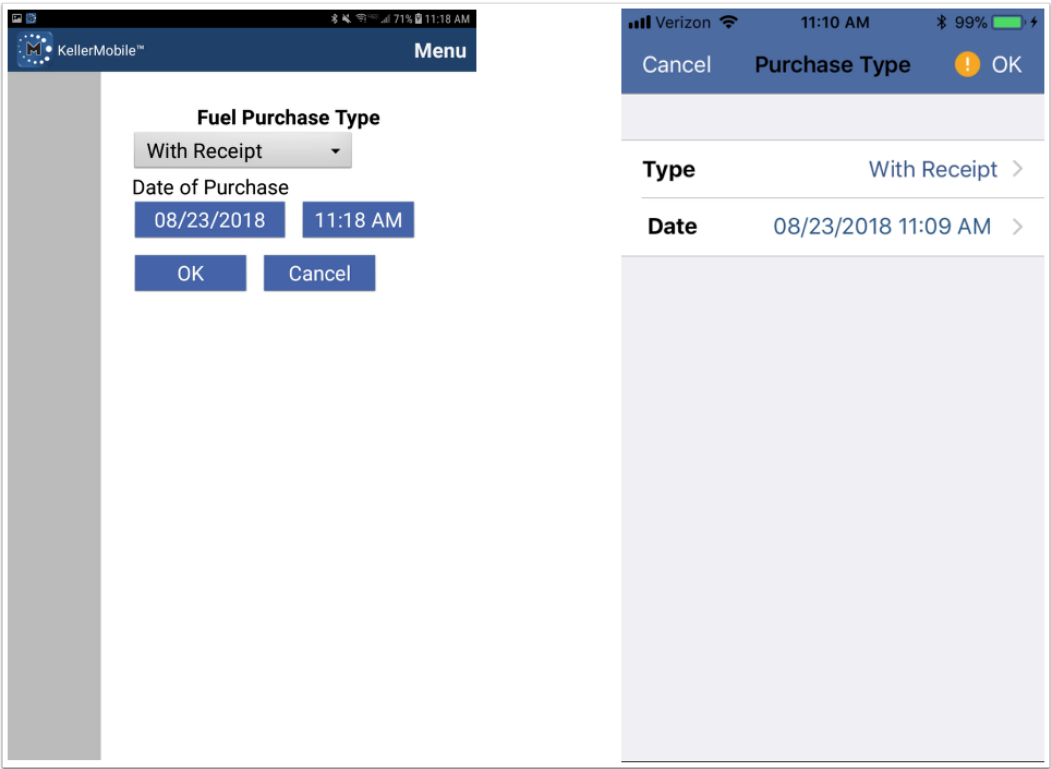
Truck 1

Select the appropriate **purchase type**.

- **With Receipt** should be selected if there is proof of purchase, i.e. a receipt
- **Without Receipt** should be selected if there is no proof of purchase, i.e. no receipt
- **Bulk** should be selected for bulk fuel in which the tax has already been paid
- **Tax Not Paid Bulk** should be selected for bulk fuel in which the tax has not yet been paid
- **Reefer** should be selected if the purchase was for reefer fuel

If the driver is entering in the fuel purchase some time after the purchase has been made, they can change the date and time here to reflect when the purchase was actually made. If the driver is entering the fuel receipt at the time of purchase, the date and time will accurately reflect the time of purchase.

Press OK.



Fuel Tax Trips and Fuel Purchases from Keller Mobile

Enter the **Purchase Price**. This price should be the full amount of the purchase, not the price per gallon/liter.

Enter in the **Fuel Vendor**.

Enter the **Invoice Number**. This would be the transaction identifier on the receipt.

Press **OK** to save the purchase.

KellerMobile™Menu

Fuel Purchase Receipt

Purchase Price

80.46

Fuel Vendor

mobil

Invoice Number

4077

OKCancel

Verizon11:12 AM100%

CancelPurchase Receipt!OK

Purchase Price

80.00

Fuel Vendor

kwik trip

Invoice Number

8675309

Once saved, the fuel purchase will remain in the Keller Mobile™ app until the next time the driver logs out and submits their logs, at which time the fuel purchase will be sent to Encompass.

Fuel Tax Trips and Fuel Purchases from Keller Mobile

If the Tractor Number is missing or entered incorrectly when the driver is entering the fuel receipt in Keller Mobile, it will come into Encompass as an **Unassigned Fuel Purchase**. The unassigned fuel purchases will show as an alert on the **Vehicle Management** home page. To assign the fuel purchase, click on the alert.

Priority Alerts
1 Unit Not Qualified
Customize This Section...

Messages
August 2018 New features now available! Click here for details

Company Statistics
100% Of Units Are Currently In Service
0 Out Of Service Days Per Unit Averaged In The Last 12 Months
1 Active Units
0 Disposed Units
0 Plated Vehicles - Total
0 Plated Vehicles Currently Out of Service
1 Vehicles Not Plated
0% Plated Vehicles with Outstanding Permits
Customize This Section...

Unit Alerts
9 Unassigned ELDs
Customize This Section...

Unit Service Alerts
1 Unit Not Qualified
Customize This Section...

Permitting Alerts
Customize This Section...

Title, License & Registration Alerts
Customize This Section...

Fuel Tax Alerts
1 Keller Mobile Unassigned Fuel Purchase
Customize This Section...

Performance Charts
Customize This Section...

Unit Maintenance Alerts
1 Unassigned DVIR-Towed Unit
Customize This Section...

Parts Inventory Alerts
Customize This Section...

The following screen will show any unassigned fuel purchases and their details. Click on the **Unit Code** to assign the fuel purchase to a trip.

Fuel Tax						
Select View: Keller Mobile Unassigned Fuel Purchase Go Customize... Print						
Unit Code	Provided Company Name	Purchase Time Stamp	Vendor State	Fuel Amount	Unit Of Measure	Fuel Cost
588	BL Setup 1	9/7/2018 8:03:00 AM	WI	55.00000	Gallons	0.0000
1 - 1						

First, the appropriate unit must be selected. Click on the Select Unit button.

Unassigned Fuel Purchase

Shaded Fields are Required

Fuel Purchase Information

Provided Unit Code	saa
Provided Company	BL Setup 1
PurchaseTimeStamp	9/7/2018 8:03:00 AM
Fuel Amount	55.00000 Gallons
Fuel Cost	0.0000
Fuel Classification	Received Not Acceptable
Vendor State/Prov	WI
Vendor Name	-
Invoice Number	

Unit Selection

Selected Unit Code	Select Unit
Selected Company	

Enter the correct unit code in the Selected Unit Code field, or, click on the magnifying glass to the right of the text box to select the correct unit. When the magnifying glass is clicked, a new window will be opened. Click on the appropriate Unit Code in the far left column. If this list is long, the user can also search by typing the unit code in the Filter Unit Code box and clicking Go. Once the correct unit is entered in the Selected Unit Code field, click Save.

Fuel Purchase - Select Unit

Shaded Fields are Required

Save Cancel

Choose a unit for the fuel purchase.

Provided Unit Code

saa

Selected Unit Code

Save Cancel

Filter Unit Code:

Go

Unit Code	Unit Desc.	Reporting Level
1	description	BL Setup 1

Next, the correct fuel tax trip needs to be selected. Click Select Trip under Trip Selection.

Unassigned Fuel Purchase

Shaded Fields are Required

Fuel Purchase Information

Provided Unit Code	saa
Provided Company	BL Setup 1
PurchaseTimeStamp	9/7/2018 8:03:00 AM
Fuel Amount	55.00000 Gallons
Fuel Cost	0.0000
Fuel Classification	Receipted Not Acceptable
Vendor State/Prov	WI
Vendor Name	-
Invoice Number	

Unit Selection

Selected Unit Code	1	Select Unit
Selected Company	BL Setup 1	

Trip Selection

Selected Trip Number	Select Trip
----------------------	-------------

If the trip number is known, it can be entered in the Selected Trip Number field. Otherwise, click on the magnifying glass like in the previous step to select the appropriate trip. Once the correct trip number is in the Selected Trip Number field, click Save.

Fuel Purchase - Select Trip

Shaded Fields are Required

Save

Cancel

Choose a trip for the fuel purchase.

Selected Trip Number

Save

Cancel

Finally, the appropriate trip line for the designated trip needs to be selected. This will determine which jurisdiction the fuel is associated with on the trip. Click **Select Trip Line** trip line selection.

Unassigned Fuel Purchase

Shaded Fields are Required

Fuel Purchase Information

Provided Unit Code	saa
Provided Company	BL Setup 1
PurchaseTimeStamp	9/7/2018 8:03:00 AM
Fuel Amount	55.00000 Gallons
Fuel Cost	0.0000
Fuel Classification	Receipted Not Acceptable
Vendor State/Prov	WI
Vendor Name	-
Invoice Number	

Unit Selection

Selected Unit Code	1	Select Unit
Selected Company	BL Setup 1	

Trip Selection

Selected Trip Number	20180904-1	Select Trip
----------------------	------------	-------------

Trip Line Selection

Select the trip line and the fuel purchase will be processed.

Select Trip Line

Click on the magnifying glass to the right of the **Selected Jurisdiction** box. In the new window, select the appropriate trip line that the fuel purchase should be associated with. Once the **Selected Jurisdiction** box has the correct two character jurisdiction code, click **Save**.

Fuel Purchase - Select Trip Line


Shaded Fields are Required

Save

Cancel

Choose a trip line for the selected trip.

Selected Jurisdiction



Click save to attach the fuel purchase to the selected trip and trip line.

Save

Cancel

The user should then receive the following confirmation that the fuel purchase has been assigned.

Fuel Tax

Fuel Purchase information was successfully stored.

To confirm that the fuel has been assigned to the appropriate trip, go to **Vehicle Management > Fuel Tax**. Either search for the unit on the left hand side, or click on **All Active Units**. Click on the correct unit number to see the list of trips for the unit. In the **Gal** column, the associated trip should now display the total gallons including what was just added. If the trip number is clicked to go into the details of the trip, the fuel purchase can also be seen under **Fuel Listings**.

Work Month Between: 7/2018 And: 9/2018 Go

Trips

Add New...

Add Attachment...

	Work Month	MI	Gal	Incomplete	Company
20180806-1	08/18	1851	0	No	BL
20180822-1	08/18	46	0	No	BL
20180823-1	08/18	12	0	No	BL
20180904-1	09/18	75	55	No	BL

Unit Information

Edit...

Code: 1 Company Level: BL Setup 1

IFTA Base Jurisdiction: Vehicle Type: (Not Specified)

Fuel Type: (Not Specified)

Trip Information

Edit...

Trip Number: 20180904-1 Miles: 75

Work Month: 09/18 Gallons: 55

Trip Incomplete: No MPG: 1.36

Trip Line Information

Edit...

ST/Prov	Odom	Non Toll	Toll	Total	Permit	Mileage
WI	327243	75	0	75	No	No

Fuel Listings

ST/Prov	Trip Line #	Fuel #	Amount	Date
WI	1	1	55GN	9/7/2018

Trip Permit Listings

ST/Prov	Trip Line #	Date	Tax Fuel	Tax Mileage	Miles Apply Fuel	Miles Apply Mileage
---------	-------------	------	----------	-------------	------------------	---------------------

Mileage Listings

ST/Prov	Trip Line #	Date	Entry City	Exit City	Highways
---------	-------------	------	------------	-----------	----------

Trip Notes

Add New...

Name	Date
------	------

Trip Attachments

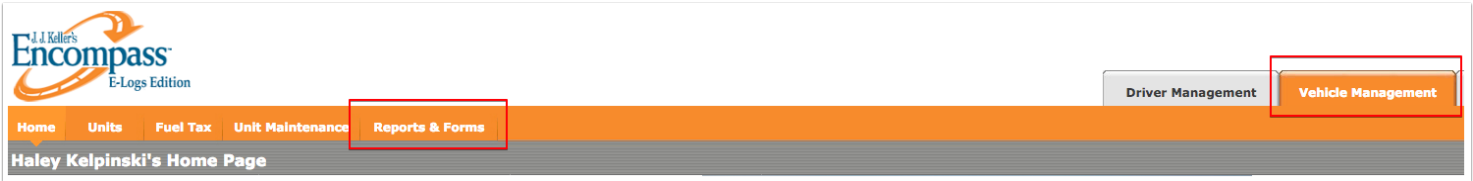
Add New...

Attachment Name	Date
-----------------	------

Reporting

Commonly Used Reports

To find these reports, go to Vehicle Management > Reports & Forms.



The reports and forms specific to fuel tax will be found on the right side under Fuel Tax Reports and Fuel Tax Forms.

Fuel Tax Reports

[Bulk Fuel Report](#)

[Fuel Listings](#)

[IFTA Audit Report](#)

[IFTA Tax Report](#)

[IRP Mileage](#)

[Mileage Listings](#)

[Permit Listings](#)

[Reefer Fuel Tax Report](#)

[Schedule A](#)

[State & Province Tax Report](#)

[Trip Count Summary](#)

[Trip Information](#)

[Unit List](#)

[Unit Mileage Report](#)

[Unit Tax Report](#)

[Unladen Mileage Report](#)

[User Control Information](#)

Fuel Tax Forms

[IFTA Form](#)

[Mileage Form](#)

For more information as to what each of these reports provide, click **Show Report Descriptions** on the left hand side. This will add descriptions beneath each title of the report or form.

The screenshot shows a web application interface for Fuel Tax Reports. On the left is a sidebar with a top navigation bar containing 'Home', 'Units', and 'Fuel'. Below this is a 'Back to Previous Page' link and a 'Reports' section with a list of report categories: 'Unit and Company Reports', 'Fuel Tax Reports', 'Fuel Tax Forms', and 'Unit Maintenance Reports'. A checkbox labeled 'Show Report Descriptions' is checked and highlighted with a red box. The main content area on the right is titled 'Fuel Tax Reports' and contains several report entries, each with a title and a description:

- Bulk Fuel Report**: This report lists the bulk fuel withdrawals for the selection and sort options you have chosen.
- Fuel Listings**: This report lists the fuel purchases made at retail locations for the selection and sort options you have chosen.
- IFTA Audit Report**: IFTA Audit Report
- IFTA Tax Report**: This report calculates the fuel taxes that are due on the International Fuel Tax Agreement(IFTA) tax report, according to the sort and selection options you have chosen.
- IRP Mileage**: This report summarizes the distances traveled in each jurisdiction and calculates the percentage of operations in each jurisdiction according to the sort and selection options you have chosen. This information is needed to complete your International Registration Plan(IRP) Schedule B. Usually, you will run this report for the Schedule B mileage year of July 1 through June 30 of the preceding registration year.
- Mileage Listings**: This report lists the unit, date, entry/exit points, and highways operated for each trip line jurisdiction(if mileage listings are required or optionally selected) according to the selection and sort options you have chosen.

Listed below are the more commonly used reports and forms

Unit Tax Report - calculates the fuel and/or mileage taxes that are due for the jurisdiction or jurisdictions in which the unit traveled, according to the sort and selection options the user chooses. This is used to tell what taxes are due for each unit instead of the overall company.

IRP Mileage Report - summarizes the distances traveled in each jurisdiction and calculates the percentage of operations in each jurisdiction according to the sort and selection options the user selects. This information is needed to complete the International Registration Plan (IRP) Schedule B. Usually, this report is run for the Schedule B mileage year of July 1 through June 30 of the preceding registration year (this will include disposed units).

IFTA Tax Report - calculates the fuel taxes that are due on the International Fuel Tax Agreement (IFTA) tax report, according to the sort and selection options chosen (this report includes disposed units)

IFTA Form - This form is used to submit IFTA. Either print out this report or copy the information into a new form online for the state (this report includes disposed units).

IFTA Audit Report - This report can be used when going through an IFTA Audit. The report provides the unit code, company name, trip number, start and end odometer, start and end latitudes and longitudes, End City/State, miles, and the Jurisdiction (this report includes disposed units).

Mileage Form - This form generates the actual mileage tax report for the jurisdictions that require one, according to the sort and selection the user has chosen. These jurisdictions are New York, New Mexico, Kentucky, and Oregon (this report includes disposed units).

Fuel Listings - This report lists the fuel purchases that have fuel receipts entered. If fuel is added but no receipt entered for it, it would not show in this report.

State & Province Tax Report - This report calculates the fuel and/or mileage taxes that are due for the jurisdictions according to the sort and selection options you have chosen.

Trip Information Report - This report lists each individual trip. This includes the miles in each state and fuel if entered.

Unit Mileage Report - This report summarizes the total distance and fuel purchase information, and calculates the miles per gallon for the unit. Summary information is also listed for reporting levels and the company.