OKLAHOMA
Office of Management
& Enterprise Services

# State of Oklahoma Fleet Card Policy and Procedures

JUNE 2026

# Contents

# 1 Overview

This document is intended to specifically address policies and procedures pertaining to the use of the state fleet card by designated individuals who are purchasing goods and services for a state-owned vehicle necessary for conducting official state business.

## 1.1 Purchasing authority and compliance requirements

All fleet card purchases must comply with applicable state laws, administrative rules, statewide purchasing policies, and the requirements of this manual. Possession of a fleet card does not grant purchasing authority beyond what is otherwise authorized by statute, rule, agency delegation or this policy.

All fleet card purchases shall be made in accordance with applicable state laws, statutes, rules, policies and procedures, including but not limited to:

- Oklahoma Central Purchasing Act, 74 O.S. §§ 85.1 et seq.
- OMES Central Purchasing Administrative Rules, OAC 260:115
- Oklahoma Purchasing Manual
- Statewide Accounting Manual

### 1.1.1 Single transaction limits

Fleet card purchases are subject to agency-specific single transaction limits established in accordance with the Oklahoma Central Purchasing Act, 74 O.S. § 85.7. When determining whether a purchase exceeds a threshold, the total value of the acquisition shall be considered rather than the value of individual transactions used to complete the purchase.

Unless otherwise authorized, the standard single transaction limit is $10,000. Certain agencies may be authorized to conduct acquisitions up to $25,000 under the fair and reasonable acquisition provisions of the Oklahoma Central Purchasing Act.

The single transaction limit applies to the total value of an individual acquisition and is separate from the agency's overall fleet card credit limit. A transaction limit restricts the amount that may be spent on a single purchase, while the credit limit establishes the total spending capacity available during a billing cycle.

### 1.1.2 Prohibition on split purchasing

Agencies and cardholders shall not divide, fragment or structure an acquisition into multiple transactions for the purpose of avoiding applicable purchasing thresholds, approvals, competitive bid requirements or procurement procedures. This practice, commonly referred to as split purchasing, is prohibited by the Oklahoma Central Purchasing Act and may result in corrective action or other remedies authorized by law.

### 1.1.3 Statewide contract purchases

The single transaction limits described above do not apply to purchases made through Oklahoma statewide contracts that are specifically authorized for fleet card use under this policy. Fleet cards may only be used in conjunction with the statewide contracts identified in this manual for authorized state-owned-vehicle-related purchases, repairs, maintenance, parts, tires and other approved vehicle-related goods and services.

The existence of a statewide contract does not, by itself, authorize use of the fleet card as a method of payment. Statewide contracts not expressly identified in this manual as eligible for fleet card purchases shall not be used with the fleet card unless specifically authorized by OMES Central Purchasing.

Authorized statewide contracts may be utilized for any dollar amount, provided the purchase complies with the terms and conditions of the applicable contract and all other State Fleet Card Program requirements.

For acquisitions that exceed an agency's authorized open-market purchasing authority and are not being made through an authorized statewide contract, the agency must obtain an approved exception prior to initiating the purchase. Additional guidance regarding exception requests is provided in Section 4, Procedural Exceptions.

## 1.2 Agency fleet card administrator responsibilities

Each participating agency shall designate one agency fleet card administrator to serve as the primary point of contact for the State Fleet Card Program. The agency fleet card administrator is responsible for the day-to-day administration, oversight and compliance of the agency's fleet card account(s) and serves as the liaison between the agency, the card issuer, and Office of Management and Enterprise Services (OMES) Central Purchasing.

Agency fleet card administrators are required to read the State of Oklahoma Fleet Card Policy and Procedures at least annually. Agency fleet card administrators are required to submit the State of Oklahoma Fleet Card Policy and Procedures Acknowledgment within 60 days of each statewide policy update.

### 1.2.1 Administrative contact management

Agencies must promptly report any changes to fleet card administrative personnel. To add, remove or update an agency fleet card administrator, the current administrator or their manager must complete and email the State Agency Fleet Card Administration Change form to OMES Central Purchasing. Maintaining current administrator information ensures that account access, notifications, reporting and program communications are provided only to authorized personnel.

### 1.2.2 Account and card management

Agency fleet card administrators are responsible for the ongoing management of all agency fleet card accounts, including:

- Requesting, ordering and replacing fleet cards.
- Establishing and maintaining authorized user accounts.
- Assigning, resetting and administering authorized user PINs.
- Activating, suspending and deactivating authorized users and cards as necessary.
- Updating account information and vehicle assignments.
- Reporting lost, stolen, compromised or misused cards.
- Ensuring fleet cards are recovered, canceled or reassigned when vehicles are disposed of, transferred, replaced or removed from service.

Administrators must ensure that fleet cards are issued only to authorized personnel and that card access remains appropriate for assigned job duties.

### 1.2.3 Card user authorization and training

Before a PIN is issued to an authorized user and any purchases are made, the authorized user must complete and sign the required authorization form(s) based on vehicle ownership.

- Authorized users driving vehicles leased through OMES Fleet Management must complete and sign OMES Form FM015C Driver Responsibility Certification.
- Authorized users driving agency-owned vehicles must complete and sign the OMES Form FM015CO Driver Responsibility Certification (Owning Agency).
- Authorized users driving both agency-owned and leased vehicles must complete and sign both forms.

The agency fleet card administrator shall:

- Verify completion of all required forms and agency internal training.
- Maintain the original signed agreement(s) in the agency's records.

- Upload the signed agreement(s) to the driver's profile in Fleetio (if agency uses Fleetio) and email it to OMES Fleet Management.
- Monitor and track user agreements to ensure they are renewed every two years.
- Ensure authorized users are informed of all fleet card policies, procedures, restrictions and reporting requirements.

Administrators are responsible for ensuring that authorized users understand their responsibilities and use their PINS and vehicle fleet cards in accordance with applicable laws, statewide policies and agency procedures.

#### 1.2.4 Compliance monitoring and record management

Agency fleet card administrators are responsible for maintaining adequate documentation to support Fleet Card transactions and program compliance. At a minimum, administrators shall:

- Maintain fleet card logs, employee agreements, exception approvals, receipts, invoices and other supporting documentation.
- Review transactions for compliance with fleet card policies and agency procedures.
- Monitor for unauthorized, unusual, excessive or potentially fraudulent activity.
- Ensure corrective action is taken when policy violations occur.
- Cooperate with audits, reviews and investigations related to fleet card activity.

Administrators should periodically review user access, account settings and transaction activity to ensure appropriate internal controls remain in place.

#### 1.2.5 Program oversight and audit authority

OMES Central Purchasing maintains statewide oversight of the State Fleet Card Program and reserves the right to review, audit and monitor agency participation at any time. Upon request, agencies must provide copies of fleet-related forms, signed employee agreements, receipts, invoices, transaction records, exception documentation and any other records necessary to verify compliance with program requirements.

Failure to maintain required documentation or comply with fleet card policies may result in corrective action, including the suspension or revocation of fleet card privileges.

### 1.3 Fleet card security and tax exemptions

As a fleet card fraud prevention measure, a clerk or service provider is not permitted to make a copy of the fleet card under any circumstances. If a merchant requests proof of state sales tax exemption, the driver must provide the clerk or service provider with a copy of the Sales Tax Exemption letter.

#### 1.3.1 State sales tax

The State of Oklahoma's sales tax exemption applies to qualifying purchases and includes applicable state and local sales taxes. Drivers should review receipts to ensure that no sales tax has been assessed in error. The State of Oklahoma and its agencies are exempt from Oklahoma sales tax. If sales tax is incorrectly charged on a transaction, the driver must request that the merchant remove the tax or issue a refund before leaving the facility.

If the sales tax issue cannot be resolved at the point of sale, the agency is responsible for contacting the merchant directly to obtain a credit invoice. The credit will then be processed in a future billing cycle.

#### 1.3.2 Conditions of participation

Federal motor fuel excise tax is separate from state sales tax. The State of Oklahoma and its agencies are exempt from federal motor fuel excise taxes on fuel purchases.

To ensure this tax exemption is applied, drivers must fuel at Level III fuel sites whenever possible. Although a receipt printed at a Level III pump may display fuel tax, the federal motor fuel excise tax is credited back through the Fleet card billing process and does not require agency action.

If a driver must purchase fuel at a non-Level III location, refer to Section 4, Procedural Exceptions. In these situations, the federal motor fuel excise tax will be charged at the time of purchase and will not be automatically credited. To recover these taxes, the agency is responsible for filing a refund claim directly with the IRS using IRS Form 8849.

## 2 Authorized uses of the fleet card

The fleet card is assigned to a specific vehicle for operational costs of that vehicle only. For all authorized purchases, suppliers must be informed of the State of Oklahoma's sales tax-exempt status prior to payment. Agencies are responsible for ensuring that Oklahoma sales tax is not charged and for obtaining any necessary credits or refunds when sales tax is assessed in error.

### 2.1 Fuel

Fleet Cards may only be used to purchase fuel for the assigned vehicle. Drivers are required to fuel at Level III fuel sites to maintain the State's federal motor fuel excise tax exemption. Fuel purchases at non-Level III locations are prohibited unless authorized under an approved exception as outlined in Section 4, Procedural Exceptions.

Drivers must purchase fuel in the following order of preference:

1. Alternative fuel – Vehicles capable of using alternative fuels must be fueled with the appropriate alternative fuel (e.g., E-10, E-85, CNG, LPG) whenever available at a Level III fuel site.
2. Regular unleaded fuel – If an appropriate alternative fuel is unavailable drivers must purchase regular unleaded gasoline at a Level III fuel site.
3. Prohibited fuel grades – Mid-grade, plus and premium fuel purchases are prohibited unless specifically required by the vehicle manufacturer.

Drivers can identify Level III fueling stations by consulting the OMES Fleet Management Driver Resources page, calling the customer service number on the back of the fleet card or swiping the card before fueling. If the driver is not prompted to enter a PIN and odometer reading, the location is not a Level III fuel site.

If a driver has trouble completing a fuel transaction at the pump, they should contact their agency fleet card administrator or the customer service number on the back of the fleet card for assistance before attempting an alternative payment method or fueling location. Drivers should not bypass Level III fueling requirements without an approved exception. Any fueling transaction conducted outside of standard procedures must comply with the requirements outlined in Section 4, Procedural Exceptions.

### 2.2 Tires and related services

All tire purchases and tire-related services for state-owned vehicles must be procured through Statewide Contract SW0024M and paid for using the fleet card. This requirement applies to the purchase, installation, repair, balancing, rotation, disposal, road hazard services and any other tire-related goods or services available under the contract. Agencies must utilize the SW0024M contracted suppliers whenever the needed goods or services are available through the contract.

The use of non-contracted tire service providers is prohibited unless emergency circumstances prevent the use of a contracted provider. When emergency circumstances require service from a noncontracted provider, the agency must document why an SW0024M supplier could not be utilized and maintain supporting documentation in accordance with applicable purchasing requirements. Refer to each supplier’s contract page for their contact information.

### 2.3 Maintenance and repair

The fleet card is authorized for the purchase of vehicle maintenance services, repair services, mechanical parts, batteries, fluids and other fleet-related supplies necessary for the operation and maintenance of state-owned vehicles.

#### 2.3.1 Vehicle maintenance and repair services

Statewide Contract SW0767 is available and highly recommended for vehicle maintenance and repair services. Agencies are encouraged to utilize the contractors awarded under SW0767 for diagnostic services, preventive maintenance, inspections, labor, mechanical repairs and other covered vehicle repair services.

The maintenance and repair services may include parts, batteries, components, fluids, fleet-related supplies and other materials necessary to complete authorized repairs. When such items are provided as part of a repair service performed under SW0767, a separate purchase through another statewide contract is not required.

Acquisitions for maintenance and repair services conducted outside of SW0767 are permitted and must be made in accordance with the open-market purchasing authority and dollar thresholds established under the Oklahoma Central Purchasing Act. The agency must ensure and document internal file records demonstrating that the pricing obtained is fair and reasonable. Refer to each supplier's contract page for their contact information.

#### 2.3.2 Vehicle parts and fleet-related supplies

Statewide Contract SW0307M shall be used when an agency purchases vehicle parts, batteries, fluids, filters, belts, hoses and other fleet-related supplies directly rather than as part of a maintenance or repair service performed by a third party.

Agencies are required to utilize the designated SW0307M suppliers for these purchases. Refer to each supplier's contract page for their contact information.

### 2.4 Car washes

Agencies are responsible for developing, implementing, and maintaining written internal policies governing the purchase of car wash services using fleet cards. Because vehicle washing needs may vary by agency operations, each agency shall determine when car wash services are necessary and establish appropriate controls to ensure purchases are reasonable, necessary and directly related to the operation and maintenance of state-owned vehicles.

Agencies leasing vehicles through OMES Fleet Management must adhere to the car wash guidelines established in OMES FM Policy F001: Fleet Card. Under Section 5.3 of that policy, car wash purchases for OMES leased vehicles are restricted to one car wash per month, not to exceed $25. Any detailing services require prior authorization from the agency fleet card administrator and notification of approval must be emailed to OMES Fleet Management at fmd.service@omes.ok.gov.

At a minimum, agency policies must address:

1. Authorized use: Define the circumstances under which car wash services may be purchased and identify any limitations on frequency, cost, vehicle type or service level.
2. Approval requirements: Establish approval and oversight procedures, including any preapproval requirements and the personnel authorized to approve car wash expenditures.
3. Documentation and record retention: Require retention of receipts and supporting documentation sufficient to demonstrate the business purpose of the purchase and the vehicle for which the service was obtained.
4. Compliance monitoring: Establish processes for reviewing transactions to ensure compliance with agency policy and to identify unauthorized or excessive use.

Agencies must incorporate these requirements into their internal purchasing procedures and communicate them to all authorized card users and other personnel responsible for fleet card oversight. Card users are responsible for complying with both statewide fleet card requirements and their agency's internal car wash policy.

Car wash purchases that do not comply with the agency's written policy or cannot be reasonably justified as necessary for the operation, maintenance, safety, appearance or mission-related use of the assigned vehicle are prohibited.

### 2.5 Emergencies

Emergency roadside assistance services and mechanical repairs are authorized on the fleet card when a contract supplier is unavailable or the vehicle cannot safely reach a state service center. In emergency situations, the safety of the driver, passengers and the public takes precedence over normal operating procedures. Drivers are authorized to take reasonable actions and incur necessary expenses to move the vehicle to a safe location, obtain emergency assistance or address conditions that present an immediate safety risk. Once the emergency has been resolved, all emergency expenditures must be reported to the agency fleet card administrator as soon as practicable to document the circumstances following the incident.

## 3 Prohibited use of the fleet card

The fleet card is restricted to authorized purchases directly related to the operation, fueling, maintenance, repair and safety of the assigned state vehicle, and purchases; purchases outside these purposes are prohibited. The following uses are specifically prohibited:

### 3.1 Convenience store and retail purchases

Fleet cards may only be used for authorized vehicle-related purchases. The purchase of food, snacks, beverages, tobacco products, personal items, over-the-counter medications, gift cards, lottery tickets or any other convenience store or retail merchandise is prohibited. Drivers must always pay for fuel and other authorized vehicle expenses at the pump whenever possible. If there are problems with paying at the pump, call your agency fleet card administrator or the number on the back of the fleet card for assistance.

### 3.2 Inventory, bulk purchases, and stock materials

Fleet cards shall not be used to purchase inventory, stock materials or supplies for future use. All purchases must be for an immediate and specific application to the assigned vehicle. The card may not be used to stock agency garages, maintenance shops, storage facilities, or service vehicles with parts, fluids, filters, batteries, tires or other consumable items intended for later use on multiple vehicles. When these types of purchases are necessary, a P-card or purchase order may be used.

### 3.3 Travel, lodging and employee expenses

Fleet cards shall not be used to pay employee travel expenses or any costs unrelated to the operation of the assigned vehicle. Prohibited purchases include but are not limited to lodging, meals, personal transportation, parking fees, tolls, airfare, registration fees, entertainment expenses and other costs that should be paid through authorized state travel reimbursement or purchasing processes.

### 3.4 Cross-vehicle equipment purchases

Each fleet card is assigned to a specific vehicle and may only be used for expenses directly associated with that vehicle. Fleet cards shall not be used to purchase fuel, maintenance services, repair parts, accessories, supplies or any other goods or services for another vehicle, piece of equipment, generator, fuel container or asset.

Drivers and agency personnel are prohibited from sharing fleet cards between vehicles or using a fleet card assigned to one vehicle to support the operation, maintenance or repair of another vehicle. Each transaction must correspond to the vehicle identified in the fleet management system and associated with the fleet card used for the purchase.

### 3.5 Other unauthorized purchases

Any purchase that is not expressly authorized by this policy or does not have a clear and direct connection to the operation, fueling, maintenance, repair or safety of the assigned vehicle is prohibited. Questions regarding the appropriateness of a purchase should be directed to the agency fleet card administrator before completing the transaction whenever practicable.

## 4 Exceptions

The State Fleet Card Program is designed to operate under standardized statewide procedures and controls. Exceptions to these requirements are intended to address unique operational circumstances where strict compliance is impractical or would unreasonably interfere with agency operations. Exceptions are not intended to circumvent state purchasing laws, statewide contracts, established internal controls or the requirements of this manual.

All exception requests must be submitted and approved prior to the transaction or activity requiring the exception unless otherwise provided by this policy. Approval of one exception does not establish precedent for future requests.

**Emergency purchases authorized under Section 2.5 are not considered procedural exceptions and are not subject to the advance approval requirements contained in this section. Agencies shall document emergency expenditures and maintain supporting records in accordance with the requirements of this policy.**

### 4.1 General exception requirements

All requests for an exception to fleet card policy must be submitted by the agency fleet card administrator using the Request for Exception to Fleet Card Policy form for review and determination by the state purchasing director or designee.

At a minimum, each request must include:

1. A detailed description of the requested exception.
2. A clear business justification demonstrating operational necessity.
3. The specific policy or procedure to which an exception is requested.
4. The anticipated duration of the exception, including beginning and ending dates.
5. Any supporting documentation necessary to evaluate the request.

Approved exceptions must be maintained in the agency's fleet card records and retained by the OMES Central Purchasing compliance representative. Agencies shall maintain documentation demonstrating compliance with any conditions imposed as part of the approval.

### 4.2 Purchases exceeding an agency’s single transaction authority

An agency requiring an open-market purchase that exceeds its authorized fleet card single transaction limit must obtain an approved exception before initiating the purchase.

Upon approval, the agency fleet card administrator may temporarily adjust the applicable transaction controls to complete the authorized purchase. Following completion of the transaction, the agency must provide supporting documentation, including the final receipt or invoice, via email to the OMES Central Purchasing compliance representative.

Under no circumstances may an exception be granted for an open-market acquisition exceeding $25,000. Any acquisition exceeding $25,000 that is not made through an authorized statewide contract must be procured in accordance with the competitive bid requirements of the Oklahoma Central Purchasing Act.

### 4.3 Non-Level III fueling locations

Agencies operating in remote, rural, or specialized field environments where Level III fuel sites are verified as unavailable, inaccessible, or operationally impractical after checking the OMES Fleet Management Driver Resources Fueling Stations page may request an exception to the Level III fueling requirement.

Approved exceptions may be granted for a specific vehicle, geographic area, operational unit, project or period of time. Agencies must demonstrate why compliance with the Level III requirement is not feasible and identify any alternative controls that will be implemented to monitor fuel purchases.

Absent an approved exception, fuel purchases at non-Level III locations are prohibited.

### 4.4 Additional exceptions

The state purchasing director may consider other exception requests on a case-by-case basis when an agency demonstrates a legitimate business need and provides adequate justification. Examples may include unique operational requirements, extended field operations, geographically remote assignments or other circumstances that make compliance with a specific fleet card procedure impractical.

Approval may include specific limitations, conditions, reporting requirements, expiration dates, spending restrictions or other controls deemed necessary to protect the integrity of the State Fleet Card Program.

The state purchasing director reserves the right to deny, modify, suspend or revoke any exception at any time.

## 5 Fleet card declines: Frequently asked questions and troubleshooting steps

### 5.1 What should I do if a Level II station pump rejects my card or doesn’t prompt for my PIN and odometer reading?

1. Ask the station attendant to point out which specific pumps are set up for Level III data.
2. Try moving your vehicle to a different pump to see if it accepts the card.
3. If no other pumps work and no other Level III station is nearby, contact your agency fleet card administrator for help.

### 5.2 What if the pump terminal itself is broken or out of service?

1. Ask the station attendant if they have a fully operational pump.
2. If no other pumps work, move to another Level III gas station or call the customer service number on the back of your fleet card for assistance in locating the nearest operational Level III station.

### 5.3 Can I pay the cashier inside the gas station for fuel?

No. Routine inside fuel purchases are prohibited, and the fleet card will automatically decline. All routine fuel purchases must be completed directly at the pump at authorized Level III stations.

### 5.4 Why did my card suddenly get locked after a few unsuccessful swipes?

If you have multiple failed swipes or incorrect data entries in a single day, Comdata will trigger an automatic fraud alert and temporarily block the card for security. **If this happens, the driver must contact their agency fleet card administrator to verify the activity and request a card release.**

### 5.5 Why did my card decline at a repair or maintenance shop?

Specific merchant types are blocked from processing transactions on the fleet card. If a vendor attempts to run a charge under a blocked MCC, the card will decline. (Refer to the list of Blocked MCC Groups.)

1. Request that the service station clerk run the transaction under a different applicable maintenance or repair category code.
2. If the clerk is unable to change it, contact your agency fleet card administrator for assistance.

### 5.6 What else could cause my card to decline?

**Single transaction limits:** Depending on your specific agency setup, your fleet card has strict single transaction cap. Standard limits are established at either $10,000 or $25,000 (for select authorized agencies), and any purchase exceeding your agency's designated threshold will automatically decline.

**Custom spend profiles:** Agency fleet card administrators have the authority to assign cards to customized spend profiles to enforce stricter usage rules (e.g., limiting a card to a maximum of 25 transactions per day) which will cause a decline once reached.

If you suspect a decline is due to a transaction cap or a profile limit restriction, contact your agency fleet card administrator immediately for assistance.