

**FLEET MANAGEMENT  
POLICY / PROCEDURE**

**SUBJECT: FLEET MANAGEMENT PARTS ROOM**

**APPROVED:** Marilyn L. Rawlings  
**MARILYN L. RAWLINGS, FLEET MANAGER**

**DISTRIBUTION:**  
**FLEET MANAGEMENT**

**PURPOSE:**

To purchase, store and issue quality parts necessary for the timely maintenance and repair of Lee County's fleet of vehicles and other rolling stock.

**PROCEDURE:**

The issue of parts from the Fleet Management Parts Room will require an official copy of the mechanic's work order or a parts room material request form properly approved by the appropriate Lee County authority.

**SECURITY**

The parts room doors shall remain locked at all times. The parts room security shutter will be closed and locked at the end of each day.

**PERSONNEL**

- A. No unauthorized personnel are allowed in the parts room.  
Authorized staff includes:
  - 1. Parts Manager
  - 2. Sr. Supply Specialist
  - 3. Supervisor(s) of Above Staff
- B. The parts room staff may need assistance occasionally from other Fleet Management staff that would need to enter the parts room. That assistance, however, will be limited to short periods of time and shall be upon the request of the parts room staff.
- C. Parts room hours are Monday through Friday, 7:00 a.m. to 5:00 p.m.

**ORDERING PARTS**

- A. All parts will be ordered from pre-approved suppliers to whom a Lee County Purchase Order has been issued. Copies of all open purchase orders will be given to the parts manager and kept on file in the parts room.

- B. No parts may be ordered without a valid Lee County purchase order number. The Parts Manager must give prior approval before ordering part using the VISA.
- C. All vendors outside the local Lee County calling area will be contacted by using a toll free number. No long distance calls will be made until all other local sources have been tried. Prior approval for long distance calls must be received from the Parts Manager and documented on the Telephone log with the name of the vendor, location, phone number, work order number and reason for the call.
- D. It is the responsibility of the parts room staff to monitor the invoice amounts by vendor in order to guarantee that purchase order amounts are not exceeded. Once the total of all invoices to any one vendor nears the total of the purchase order, the Parts Manager should notify the appropriate fiscal staff to increase the purchase order accordingly.
- E. All vendors shall be reminded of the facility hours and delivery location when parts orders are placed.
- F. All ordering of parts for departments MUST go through the Fleet Management parts room staff. No direct departmental ordering of vehicle parts is allowed.
- G. All Two day Air, Next Day Air and overnight delivery charges will receive prior approval from an authorized supervisor in the requesting department. The department will be charged by Fleet for all special freight charges, unless approved by user department or the Fleet Superintendent. All parts will be delivered by the vendor or sent by freight truck.

#### **PERSONAL USE**

- A. Parts for Fleet Management staff's personal use are not to be ordered through the Fleet parts room, even if delivered on a cash/COD basis and paid for by the employee.
- B. Employees of the Fleet Management facility are not to utilize discounted part prices at any part vendor when purchasing parts for personal use without prior approval from supervisor.

#### **PARTS DELIVERY**

- A. All parts delivered to the Lee County Fleet Management facility will be received at the rear counter of the parts room, which may be accessed from the rear of the facility.
- B. All delivered parts are to be verified against the packing slip or invoice at the time of delivery and signed by the receiver.
- C. All part invoices shall be verified for accuracy, posted, signed by the parts room manager, and forwarded to the Finance for payment within one week of receipt.
- D. Whenever a vendor arrives on site to deliver parts, he/she should be directed to the back of the facility to the parts room door and counter. No deliveries of parts will be accepted at any other location in the facility.

- E. Only parts room employees or their designee are authorized to accept delivery of vehicle parts.**
- F. No merchandise is to be accepted that cannot be matched to a Lee County Purchase Order.**
- G. In the case of emergencies or vendors who do not provide delivery, the parts room staff will pick up the parts. If only one parts person is on duty, other arrangements must be made with the parts room staff on duty or the supervisor.**

#### **PARTS PICK-UP**

- A. Fleet Mechanics**
  - 1. All fleet mechanics are to pick up necessary parts at the main parts counter of the facility. In order for parts to be released, the mechanic must provide an official copy of the vehicle work order, which includes the vehicle asset number, and vehicle year, make and model. Additional information may also be required for special order parts.**
  - 2. At no time will parts be released to a mechanic without the proper paperwork, including the work order number and the proper supervisor's approval (if necessary).**
- B. Lee County Departments**
  - 1. All employees of other Lee County departments must pick up their parts at the rear counter of the parts room. In order for parts to be released:**
  - 2. Whenever possible, departments should call 24 hours ahead to ensure that the required parts are in stock. This is extremely important when picking up large quantities of merchandise, which could leave the parts room stock in an unnecessarily low condition.**
  - 3. Special order parts must be called in at least 24 hours ahead of time. Upon arrival the parts room staff will notify the department for pick-up. Any merchandise not picked up within 72 hours after notification will be returned to the vendor for credit or billed to the department and put into stock. Exceptions will be made only upon prior arrangement with the Parts Manager.**
  - 4. At no time will parts be released to an employee without the proper paperwork and authorizing signatures.**

#### **POSTING OF PARTS IN FASTER SYSTEM**

- A. All parts received at the Fleet Management facility must be logged into the FASTER system by the parts room staff or designee.**
- B. Cyclical physical counts shall be taken of stock on hand for comparison to the book inventory posted in the FASTER system.**
- C. Summary reports of inventory movement will be presented to Fleet Manager each month.**

- D. Exception reports of high values and/or critical parts usage will be presented to Fleet Manager each month.**
- E. A complete physical inventory will be taken annually in conjunction with the County's fiscal year end closeout.**
- F. Inventory adjustments should be made after thorough investigation of discrepancies and with prior approval from fiscal staff and Fleet Manager.**

#### **PARTS INVENTORY**

- A. The Parts Manager will supply the Fleet Manager with a print out of the parts room inventory on a yearly basis. The report is due October 1st of each calendar year.**
- B. Cyclical inventory will be performed weekly or monthly, at the discretion of the Parts Manager.**
- C. The inventory will be performed by the Supply Specialist and supervised by the Parts Manager.**
- D. The inventory is to be verified and re-counted as needed by the Parts Manager.**

#### **PAYING PART INVOICES**

- A. New vendors are notified of parts room hours, delivery procedures, etc. Vendors must submit original invoices directly to the Finance Department for payment with a copy to Fleet for our files.**
- B. The Fleet Parts Manager or designee will post invoices in tracking system, stamp the invoice "POSTED" and sign the invoice before forwarding the invoice to Finance for payment. No payments will be made from packing slips or duplicate invoices. All parts invoices must be sent to Finance within 48 hours of receipt.**

**Revised : May 2011**