



California Transit Insurance Pool Vehicle Database User Guide

The CaITIP Vehicle Database can be used for 2 purposes. They are as follows:

- *Vehicle Schedule Maintenance*
- *Requesting Certificates of Coverage/Insurance*

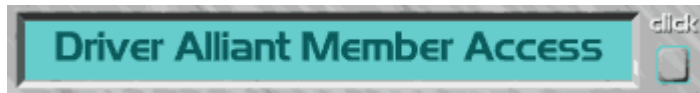
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driver→alliant
INSURANCE SERVICES

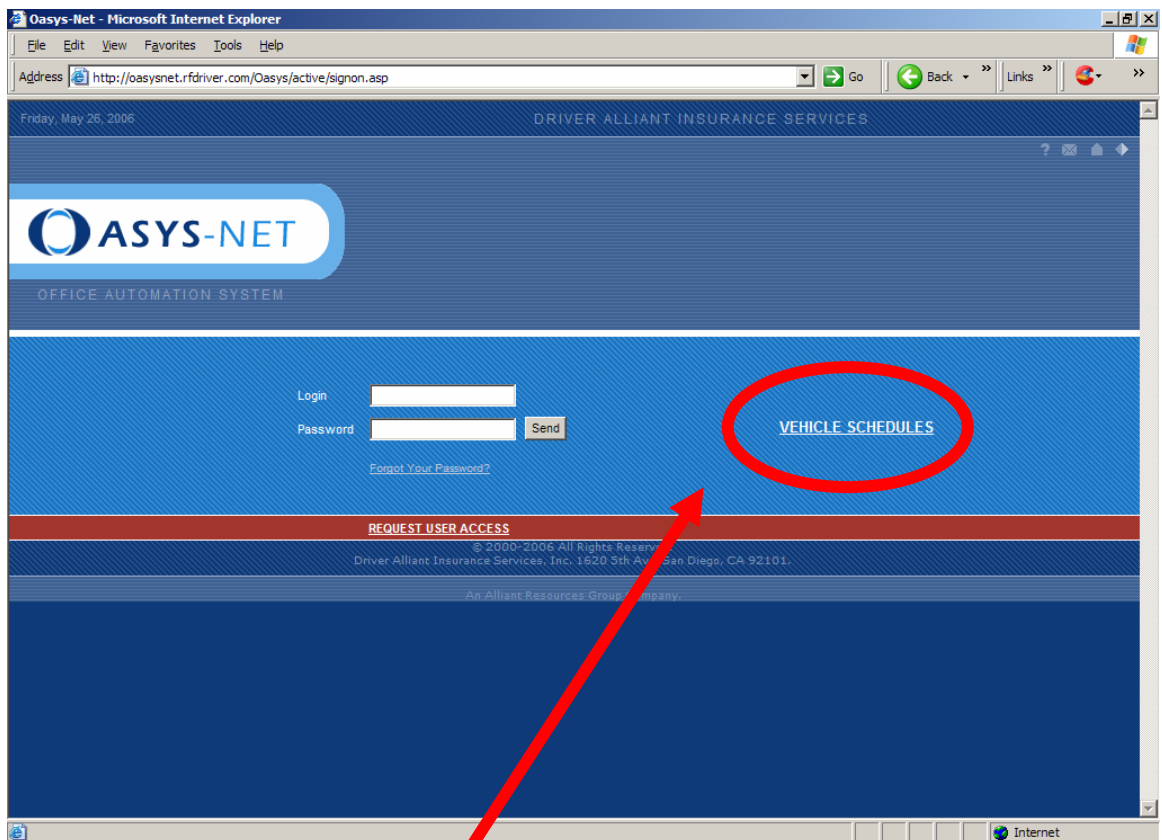
600 Montgomery Street, 9th Floor
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I. Accessing the System

- A. Enter the CalTIP's internet address into your Internet Explorer (IE) browser: <http://www.caltip.org/> . Look for, and click on, the following link at the top of the page:



- B. From there, you will arrive at Driver Alliant's Oasys-net home page. Select the option for *Vehicle Schedules*. (See red circled area below.)



Click Here

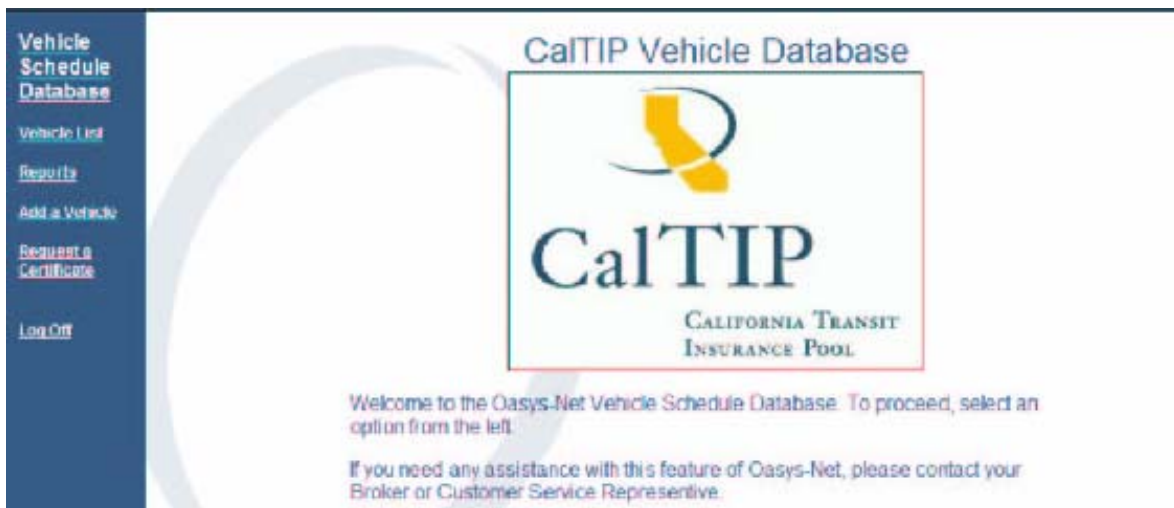
C. You will be presented with the server login page as follows:



The image shows a 'Server Login' form on a yellow background. At the top, it says 'Server Login' in bold black text. Below that, it says 'Please enter your Username and Password'. There are two input fields: 'Username' and 'Password'. Below the 'Password' field is a blue 'Login' button.

D. Enter your username and password as provided by either CalTIP or Driver Alliant. If you do not have a username or password, use your back button and select the *Request User Access* option from the Oasys-Net home page.

Once logged in, you will see the Vehicle home page as shown below:



The image shows the 'CalTIP Vehicle Database' home page. On the left is a dark blue sidebar with white text links: 'Vehicle Schedule Database', 'Vehicle List', 'Reports', 'Add a Vehicle', 'Request a Certificate', and 'Log Off'. The main content area has a light blue background with a large, faint circular graphic. At the top right, it says 'CalTIP Vehicle Database'. Below that is a logo for 'CalTIP CALIFORNIA TRANSIT INSURANCE POOL'. The logo features a yellow outline of California with a blue swoosh. Below the logo, it says 'Welcome to the Oasys-Net Vehicle Schedule Database. To proceed, select an option from the left.' and 'If you need any assistance with this feature of Oasys-Net, please contact your Broker or Customer Service Representative.'

II. Modifying a Vehicle

- A. Use the *Vehicles List* option to display the list of vehicles for the member(s):

The screenshot shows a web application interface for a 'Vehicle Schedule Database'. On the left is a navigation menu with options: 'Vehicle List' (highlighted with a red circle), 'Reports', 'Add a Vehicle', 'Request a Certificate', and 'Log Off'. The main area displays a table of vehicles for member 'Amador Arcata'. The table has columns for Member Name, Vehicle Number, Vehicle, VIN, and Deleted. Navigation buttons for '<<PREVIOUS', 'NEXT>>', '+->EXPAND', and '-COLLAPSE' are present at the top and bottom of the table.

Member Name	Vehicle Number	Vehicle	VIN	Deleted
Amador Arcata	008	1987 GILLIG PHANTOM	81540	
	009	1987 GILLIG PHANTOM	81541	
	011	1991 ELDORADO MST2400	04265	
	012	1991 ELDORADO MST2400	04264	
	014	1995 GILLIG PHANTOM	85420	
	015	1995 GILLIG PHANTOM	85421	
	123456	2002 Volvo Bus	123156	
	99234234	2002 Volvo Van	48566	

- B. Click on the appropriate vehicle to open it for editing. The vehicle details page will display:

The screenshot shows the 'Vehicle Details' page with tabs for 'Vehicle Details', 'Comments', and 'History'. The 'Vehicle Information' section contains the following fields:

- *JPA / Program Name: CalTIP
- Agency Vehicle Number: 2K7
- Type: Bus
- Year: 2000
- Make: ORION
- Model: BUS
- Seating: 43
- VIN: 501426
- *Delete Date: [Calendar icon]
- *Butte County
- Department: [Text box]
- Usage: Fixed Route
- Status: Revenue
- Odometer Miles: 30,820
- **Cost New: \$60,000
- **Actual Cash Value: \$24,000
- Coverage: None
- **Deductible Level: \$5,000
- Do you provide the Primary Automobile Liability Coverage for this Vehicle? Yes No
- *Change Effective Date: [Calendar icon]

Buttons: Delete, Save, Cancel

* Required Fields **Required for Vehicles with Physical Damage Coverage

Driver Alliant Insurance Services, Inc. 1620 5th Ave. San Diego, CA 92101 an Alliant Resources Group Company.

- C. Execute required changes;

Note:

- *Several fields have drop-down lists to find the appropriate setting. Other fields are text or numeric;*
- *Date fields include a calendar icon. Click this icon to access a calendar for date selections;*
- *Any change to the record will enforce a Change Effective Date value to be entered prior to saving the document.*

- D. When complete, press the *Save* button to accept your change.

III. Creating (Adding) a Vehicle

- A. Use the option to *Add a Vehicle* from the Vehicle home page menu;
- B. Complete all required fields;
- C. Press the *Save* button to accept your new vehicle.

IV. Deleting a Vehicle

- A. Use the option for *Vehicle List* from the Vehicle home page menu;
- B. Select the vehicle to be deleted;
- C. Enter a deletion date for this vehicle;
- D. Click the *Delete* button.

Note - The vehicle will display in the Vehicle List report as deleted.

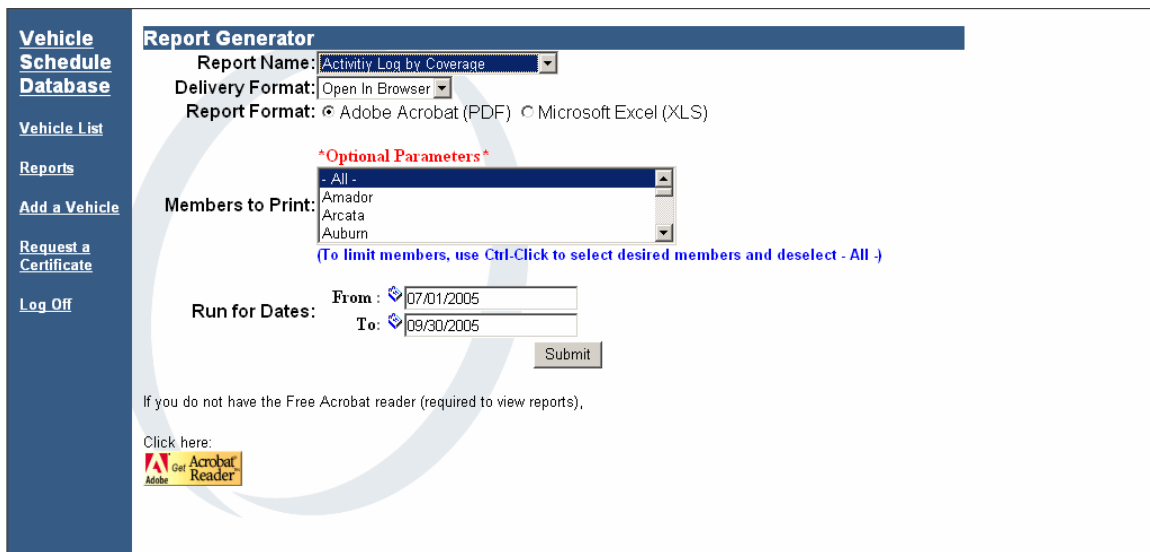
Un-Deleting a Vehicle - If you have inadvertently deleted a vehicle you can “un-delete” it as follows.

1. Use the option for *Vehicle List*. Select the vehicle to be un-deleted;
2. Press the *Un Delete Vehicle* button.

V. Reports


The reports system allows you to download a variety of reports in either Adobe PDF or Microsoft Excel format. You will need a copy of Acrobat installed prior to downloading the PDF reports.

- A. Select the option for *Reports* from the Vehicle home page menu. You will see the following screen:



The screenshot shows a web interface for a 'Report Generator'. On the left is a blue sidebar with navigation links: 'Vehicle Schedule Database', 'Vehicle List', 'Reports', 'Add a Vehicle', 'Request a Certificate', and 'Log Off'. The main content area has a title bar 'Report Generator' and the following fields:

- Report Name:** A dropdown menu currently showing 'Activity Log by Coverage'.
- Delivery Format:** A dropdown menu currently showing 'Open In Browser'.
- Report Format:** Radio buttons for 'Adobe Acrobat (PDF)' (selected) and 'Microsoft Excel (XLS)'.
- *Optional Parameters***: A section with a dropdown menu for 'Members to Print' showing 'Amador', 'Arcata', and 'Auburn'. Below it is a note: '(To limit members, use Ctrl-Click to select desired members and deselect - All -)'. The current selection is '- All -'.
- Run for Dates:** Two date input fields. 'From:' is set to '07/01/2005' and 'To:' is set to '09/30/2005'. A 'Submit' button is located below these fields.

At the bottom of the main area, there is a note: 'If you do not have the Free Acrobat reader (required to view reports), Click here: '.

- B. **REPORT NAME** - Use the drop down to select the appropriate report to export;
- C. **DELIVERY FORMAT** – Select open in browser (saving is permitted) or E-Mail Report (your e- mail address will automatically pre-fill) Please note that you can change the email address if you wish the report to go to another address;
- D. **REPORT FORMAT** – Adobe Acrobat or Microsoft Excel;
- E. Press the *Submit* button to process the report. Each report will take several seconds to process, please be patient.

VI. Requesting a Certificate of Insurance and/or Coverage

To request a certificate of insurance and/or coverage, follow the *Accessing the System* steps above and click on *Request a Certificate* from the **vehicle home page**. Complete required fields and press the “Submit button. Your request will be directed to Driver Alliant staff.

Note: For certificate requests that require “additional insured” status, a copy of the contract evidencing the requirement should be faxed to Driver Alliant staff at 415.402.0773, attention Brian White.

If you have any questions regarding the database, please contact:

Brian White
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600 Montgomery Street, 9th Floor
San Francisco, CA 94111
(415) 403-1420 – Telephone
(415) 402-0773 – Facsimile