

POLICY

M2 Records

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REV	Date	Status / Description of Changes
01	05/08/2019	Updating all laws/regulations dates to the current standard. Adjusting template, for a more clear layout.
02	14/08/2020	Updated Template Minor changes
03	07/12/2020	Minor adjustment to template
04	01/11/2021	Minor adjustment to template, laws/regulations checked

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Requirement

To manage and retain all requisite records.

Policy

The company ensures that fleet management records are available to provide evidence of fleet management activities and that all information is current, accessible, legible and retained for the required durations.

Procedure

1. The company will set up filing systems either digitally or analogue using the headers set out below
2. All analogue records will be filed according to relevant files
3. Any scanned or digital records will be filed on the Company server/cloud storage
4. All documents will be named and dated prior to being filed
5. The Company will retain records according to the below scales:
 - 12 months for drivers' hours records
 - 24 months for working time records
 - 15 months for statutory annual vehicle tests (after their expiry date)
 - 14 weeks for vehicle nil defects records or until the next vehicle safety inspection
 - 15 months for records relating to vehicle safety inspections, defects and maintenance All other records relevant to the FORS Standard must be retained until the next FORS audit.

Filling Systems

Main Planner Spreadsheet

A Spread sheet will be employed to record:

- HGV Forward Planner
- VAN Forward Planner
- Maintenance log
- Driver Information
- Skills Training Matrix

Company Files

- Operator Licence
- Maintenance agreement
- Insurance documents
- Vehicle Authorisations
- License/TC Correspondence
- DVSA Correspondence
- Applications
- Self-service & OCRS login details
- Company Card
- Audits
- Archive
- OCRS score and updates
- Fines
- Incidents
- Insurance Claims
- Breakdowns
- Roadside Stops
- Complaints

Vehicle Files

- Keep vehicle files separate in a filing cabinet or a ring binder by vehicle registration
- Create a content sheet for the file
- Clearly mark each section by the document(s) header using either plastic folders or card separator
- Keep all records in date order
- MOT Cert and test sheet
- V5 registration
- Plating Certificate

Maintenance files

- PMI service sheets
- Brake testing sheets
- Tachograph Calibration Certificate
- LEZ Test Certificates
- Vehicle defect report sheets
- Supplier invoices/receipts
- Ancillary equipment/machinery certificate (Tail lift etc)

Driver Files

- You will need two sections – Personal and Official
- Create a content sheet for the file
- Clearly mark each section by the document(s) header using either plastic folders or card separator
- Keep all records in date order
- Application form
- Induction form
- Training records – Driver CPC certificates
- Driving Licence - must be checked/copied and held on file

Miscellaneous files

Any other documents relating to the vehicle such as suppliers data, weighbridge tickets, windscreen, tyres, recovery, warranty and other relevant paperwork for each vehicle.

Thomas Barrett – Director

