

FLEET MANAGEMENT

The function of acquiring (either by purchase, leasing or chartering), managing, maintaining, repairing and disposing of vehicles. Vehicles are any means of conveyance owned or used by the organisation to transport people or items. Excludes vehicles acquired to support the Defence combat function, but includes all other special purpose vehicles.

Accidents

The activities involved in dealing with mishaps causing injury or damage. Includes damage or injury to the organisation's property or member of staff incurred while coming to, at, or leaving work, or to the general public or visitors whilst on the organisation's premises. Also includes measures to prevent accidents occurring.

Class No	Description of records	Disposal action
1292 ■■■■■■■■	Records detailing accidents/incidents involving Commonwealth vehicles. Includes: <ul style="list-style-type: none"> • vehicle accident reports; • investigation reports; • documents authorising the use of the vehicle; • records of driver/operator/pilot licences and certificates of competencies; • logs of vehicle operations; and • booking schedules and other evidence supporting the use of the vehicle. 	Destroy 7 years after accident/incident

[For lodgement of a claim for damages to a Commonwealth vehicle or third party vehicle or property, use FLEET MANAGEMENT - Claims.

For accident reports where there is an injury to an employee, use COMPENSATION - Cases. For accident reports where there is an injury to a member of the public who submits a claim for compensation, use COMPENSATION - Claims.

For accident reports where an employee was involved in an accident but where no compensation claim was lodged, use PERSONNEL - Accidents.

For accident reports sent to the lead agency (currently Comcare) covering deaths, serious personal injury, incapacity and dangerous occurrences for both employees and members of the public, use OH&S - Accidents.

For legal action resulting from an accident, use LEGAL SERVICES - Litigation.]

Acquisition

The process of gaining ownership or use of property and other items or the provision of services required in the conduct of business through purchase or requisitions..

Class No	Description of Records	Disposal Action
N/A	<i>[For the acquisition of vehicles for Commonwealth use and goods and services required to support the fleet management function (eg vehicle accessories and fuel), use the PROCUREMENT function.]</i>	N/A

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Agreements

The processes associated with the establishment, maintenance, review and negotiation of agreements.

For records relating to the tendering process and contracts, use PROCUREMENT - Tendering.

For managing contract arrangements, use PROCUREMENT - Contracting-out.

Class No	Description of records	Disposal action
1295 ■■■■■■■■■■	Final version of agreements and Memoranda of Understanding made to support the fleet management function.	Destroy 7 years after expiry or other termination of agreement
1296 ■■■■■■■■■■	Records documenting negotiation, establishment, maintenance and review of agreements.	Destroy 7 years after expiry or other termination of agreement

Allowances

The activities involved in arranging and managing money paid to employees in addition to salary to cover expenses incurred in the course of employment, eg travelling allowances.

Class No	Description of records	Disposal action
1297 ■■■■■■■■■■	Records documenting applications for allowances to employees for use of private vehicles for official business.	Destroy 7 years after action completed

[For the payment of allowances to employees, use FINANCIAL MANAGEMENT - Salaries.]

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Arrangements

The activities involved in arranging for a journey or trip. Includes preparing travel itineraries, authorisations, entitlements, etc. Also includes arrangements made for delivery of equipment or goods and the usage made of facilities, vehicles, equipment and space.

Class No	Description of records	Disposal action
1298 ■■■■■■■■■■	Records documenting arrangements for using Commonwealth vehicles. Includes: <ul style="list-style-type: none">• booking schedules;• trip instructions (eg sailing directions);• travel itineraries and programs;• records documenting a check of appropriate authorisations (eg validity of driver/operator/pilot licences and certificate of competencies); and• trip logs.	Destroy 2 years after action completed

[For records detailing use arrangements for vehicles involved in accidents, use FLEET MANAGEMENT - Accidents.]

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Authorisation

The process of delegating power to authorise an action and the seeking and granting permission to undertake a requested action.

Class No	Description of records	Disposal action
1299 ■■■■■■■■	Delegations of powers to agency staff to authorise administrative action relating to the fleet management function.	Destroy 7 years after delegation expires
1300 ■■■■■■■■	Requests and approvals for the use of vehicles involving financial arrangements. Includes permission for: <ul style="list-style-type: none"> • use of private vehicles for official business; • maintenance and repairs; and • private use of fuel card and arrangements for reimbursement. <p><i>[For records supporting authorisation if the vehicle is involved in an accident, use FLEET MANAGEMENT - Accidents.]</i></p>	Destroy 7 years after action completed
1301 ■■■■■■■■	Requests and approvals authorising the use of vehicles not involving financial arrangements. Includes giving permission: <ul style="list-style-type: none"> • to carry non-Commonwealth passengers; • for home garaging of vehicles; • for Executive Officers to use vehicles while on leave; and • for learner drivers to drive a vehicle. <p><i>[For records supporting authorisation if the vehicle is involved in an accident, use FLEET MANAGEMENT - Accidents.]</i></p>	Destroy 1 year after authority expires
1302 ■■■■■■■■	Copies of endorsed vehicle-related invoices passed to the delegate for payment. <p><i>[For the payment of the invoices, use FINANCIAL MANAGEMENT - Accounting and/or FINANCIAL MANAGEMENT -Payment.]</i></p>	Destroy when reference ceases

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Claims

The process of administering and managing payments demanded in accordance with an insurance policy as compensation for injury, death, or denial of rights of a person, or damage to or destruction of property. Includes disputes over rights and ownership, and recompense sought for stolen or lost property.

Class No	Description of records	Disposal action
1303 ■■■■■■■■■■	Records documenting insurance claims. Includes copies of claims, reports and related correspondence.	Destroy 7 years after action completed

Committees

The activities associated with the managing of committees and task forces. Includes the committee's establishment, appointment of members, terms of reference, proceedings, minutes of meetings, reports, agenda etc.

Class No	Description of records	Disposal action
1304 ■■■■■■■■■■	Records of internal and external committees formed to consider matters relating to the fleet management function. Includes: <ul style="list-style-type: none"> • documents establishing the committee; • final versions of minutes; • reports; • recommendations; and • supporting documents such as briefing papers and discussion papers. 	Destroy 2 years after action completed
1305 ■■■■■■■■■■	Working papers documenting the administration of committees which consider matters relating to the fleet management function. Includes: <ul style="list-style-type: none"> • agenda; • notices of meetings; and • draft minutes. 	Destroy when reference ceases

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Compliance

The activities associated with complying with mandatory or optional accountability, fiscal, legal, regulatory or quality standards or requirements to which the organisation is subject. Includes compliance with legislation and with national and international standards, such as the ISO 9000 series.

Other activities within this function may also be relevant to the Compliance activity.

Class No	Description of records	Disposal action
1306 ■■■■■■■■	Records documenting agency compliance with mandatory or optional standards or with statutory requirements relating to the fleet management function.	Destroy 7 years after action completed
1307 ■■■■■■■■	Records documenting the registration of agency vehicles. Includes inspections and renewal papers.	Destroy when registration is renewed or expires
1308 ■■■■■■■■	Records documenting the calculation of Fringe Benefit Tax (FBT) liabilities.	Destroy 5 years after action completed

[For managing FBT arrangements attached to individual employee's salary packages, use PERSONNEL - Salaries.

[For the processes involved in managing financial transactions associated with meeting agency FBT obligations, use FINANCIAL MANAGEMENT - Accounting.]

Contracting-out

The activities involved in managing the performance of work or the provision of goods and services by an external contractor, vendor or consultant, or by using external bureau services. Includes outsourcing.

For information on records issues relating to outsourcing and contracting-out see General Disposal Authority 25.

Class No	Description of Records	Disposal Action
N/A	<i>[For records documenting contract management relating to the fleet management function, use PROCUREMENT – Contracting-out.]</i>	N/A

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Disposal

The process of disposing of property no longer required by the organisation, by sale, transfer, termination of lease, auction, donation or destruction. Includes destruction or transfer to archives, and the program of activities to facilitate the orderly transfer of semi-active and inactive records from current office space into storage.

Class No	Description of records	Disposal action
1310 ■■■■■■■■	Records documenting the disposal of Commonwealth owned vehicles. Includes: <ul style="list-style-type: none">• independent valuation;• certification of work undertaken on a vehicle prior to disposal;• written quotes;• auction records; and• routine forms and correspondence documenting the disposal of vehicles.	Destroy 7 years after disposal of vehicle
1311 ■■■■■■■■	Records documenting the return of leased vehicles. Includes: <ul style="list-style-type: none">• written notices and correspondence with leasing companies;• handover reports;• notification that the agency or its nominee wishes to purchase vehicle; and• arrangements for the restoration of the vehicle to the original condition.	Destroy 3 years after disposal of vehicle

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Infringements

The activities associated with handling breaches of rules. Includes driving or traffic infringements and infringements of the organisation's intellectual property.

Class No	Description of records	Disposal action
1312 ■■■■■■■■	Records documenting breaches of the agency's rules and/or driving, traffic, aeronautical or marine laws. Includes copy of infringement notice, correspondence with relevant authority and other supporting documentation.	Destroy 1 year after action completed

[For cases where legal support is sought, use LEGAL SERVICES - Infringements.

For cases that proceed to litigation, use LEGAL SERVICES - Litigation.

For disciplinary action arising from infringements by employees, use PERSONNEL - Discipline.]

Insurance

The process of taking out premiums to cover loss or damage to property or premises, and to cover customers and staff against injury or death resulting from incidents on the organisation's premises or whilst engaged during employment.

For insurance claims lodged, use FLEET MANAGEMENT - Claims.

For managing financial transactions supporting insurance activities, use FINANCIAL MANAGEMENT - Accounting and/or FINANCIAL MANAGEMENT - Payments.

Class No	Description of records	Disposal action
1313 ■■■■■■■■	Vehicle insurance policies.	Destroy 7 years after policy expires
1314 ■■■■■■■■	Records documenting the annual renewal of insurance policies.	Destroy 1 year after action completed

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Leasing

The activities involved in leasing items, equipment, accommodation, premises or real estate from another organisation. Includes the process of chartering.

Class No	Description of Records	Disposal Action
N/A	[For the leasing of vehicles, including the short term hire of vehicles, use PROCUREMENT – Leasing.]	N/A

Maintenance

The activities associated with the upkeep, repair, servicing, modification and preservation of internal/external conditions of premises, equipment, vehicles etc.

For the payment of accounts relating to maintenance activities, use FINANCIAL MANAGEMENT - Accounting and Payment.

Class No	Description of records	Disposal action
1317 ■■■■■■■■	Records documenting the maintenance, repair and modification of Commonwealth owned vehicles. Includes maintenance record books/logs.	Transfer to the new owner after sale or destroy 6 months after the write-off of the vehicle. (See instruction on the transfer of custody and ownership of Commonwealth records in Introduction)
1318 ■■■■■■■■	Records documenting the maintenance and servicing of leased vehicles. Includes maintenance record books/logs.	Transfer to leasing company after lease expires or is terminated. (See instruction on the transfer of custody and ownership of Commonwealth records in Introduction)

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Meetings

The activities associated with ad hoc gatherings held to formulate, discuss, update or resolve issues and matters pertaining to the management of the section, department, or organisation as a whole. Includes arrangements, agenda, taking of minutes etc. Excludes committee meetings.

Class No	Description of records	Disposal action
1319 ■■■■■■■■	Final version of minutes and supporting documents tabled at meetings held to support the fleet management function. Includes meetings with external agencies.	Destroy 2 years after action completed
1320 ■■■■■■■■	Working papers documenting the conduct and administration of meetings held to support the fleet management function. Includes agenda, notices of meetings and draft minutes.	Destroy when reference ceases

Policy

The activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the organisation's operating procedures are determined.

Class No	Description of records	Disposal action
1321 ■■■■■■■■	Records documenting the development and establishment of the agency's fleet management policies. Includes: <ul style="list-style-type: none"> • policy proposals; • research papers; • results of consultations; • supporting reports; • major drafts; and • final policy documents. 	Destroy 7 years after policy is superseded
1322 ■■■■■■■■	Records documenting comments made on the development of government-wide fleet management policies.	Destroy 2 years after promulgation of the new policy
1323 ■■■■■■■■	Working papers documenting the development of all fleet management policies.	Destroy 2 year after promulgation of the new policy
1324 ■■■■■■■■	Copies of policy documents and supporting papers.	Destroy when reference ceases

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Procedures

Standard methods of operating laid down by an organisation according to formulated policy.

Class No	Description of records	Disposal action
1325 ■■■■■■■■	Master set of agency manuals, handbooks, directives etc detailing procedures supporting the fleet management function.	Destroy 7 years after procedures are superseded
1326 ■■■■■■■■	Records documenting the development of agency procedures supporting the fleet management function.	Destroy 2 years after production of procedures
1327 ■■■■■■■■	Copies of manuals, handbooks, directives etc.	Destroy when reference ceases

Reporting

The processes associated with initiating or providing a formal response to a situation or request (either internal, external or as a requirement of corporate policies), and to provide formal statements or findings of the results of the examination or investigation. Includes agenda, briefing, business, discussion papers, proposals, reports, reviews and returns.

Class No	Description of records	Disposal action
1328 ■■■■■■■■	Final versions of formal reports and reports made to external agencies relating to the fleet management function.	Destroy 5 years after action completed
1329 ■■■■■■■■	Final versions of periodic internal reports on general administrative matters used to monitor and document recurring activities to support the fleet management function. Includes reporting on accidents/incidents and theft involving Commonwealth vehicles.	Destroy 3 years after action completed
1330 ■■■■■■■■	Working papers documenting the development of all reports. Includes drafts and comments received.	Destroy when reference ceases
1331 ■■■■■■■■	Copies of financial management reports.	Destroy when reference ceases

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Tendering

The activities involved in receiving and assessing tenders, of making offers and finalising contract arrangements for the supply, sale or purchase of goods and services.

Class No	Description of Records	Disposal Actions
N/A	<i>[For tendering carried out to support a contracting process for leasing vehicles, use PROCUREMENT – Tendering.]</i>	N/A