

SCHEDULE NO. 35

FLEET AND EQUIPMENT RECORDS

General Description: Records documenting the operation of vehicles and equipment.

*No record may be destroyed under this Retention Schedule if it is pertinent to any current, pending or anticipated investigation, audit or legal proceeding. **The minimum retention periods specified in this schedule apply to the information contained within the record copy, regardless of the physical format of the record copy (paper, microfilm, electronic).** Each municipality must decide on the physical format for each type of record, ensuring authenticity, readability and accessibility for the entire retention period. **Duplicate Copies:** Retain duplicated copies until no longer needed but not longer than the record copy. <Amended 5/14>*

35.010 EQUIPMENT RECORDS IN GENERAL

Records pertaining to all types of equipment, mechanisms and systems and their maintenance, inspection and repair history, including fire and water detection alarm systems; heating, ventilation, air conditioning (HVAC) systems; disaster warning systems; elevators; sump pumps; power generators; boilers; measuring and weighing devices; tools; office equipment, recording systems; etc. Documentation includes warranties, operating manuals, calibration and testing records, inspections, vehicle registration certificates, titles, bills of sale, etc.

Retention: Until equipment is no longer under municipal control or life of equipment + 1 year and/or after audit, unless another retention period is required by law or specified elsewhere in this Retention Schedule

35.020 FUEL USE RECORDS

Records pertaining to fuel usage, including periodic fuel usage reports.

Retention: 2 years

35.030 MAINTENANCE AND SAFETY RECORDS – VEHICLES AND EQUIPMENT

A. Driver Vehicle Inspection Reports

Vehicle inspection reports and documentation of corrective actions taken to address defects or deficiencies noted during the inspection done by the driver prior to each operation of a commercial motor vehicle. Note: A legible copy of the last vehicle inspection report is to be carried in the vehicle.

Retention: 3 months [49 CFR 396.11]

B. Inspection and Maintenance Documentation

Records pertaining to maintenance and inspections performed for vehicles and equipment, including those records required by State and Federal regulations; includes manufacturer-issued manuals and warranties, inspection reports, vehicle maintenance histories and work orders providing the only available vehicle history. [General Reference: 49 CFR 396.21 requires annual inspection reports of commercial motor vehicles to be retained for 14 months after the inspection where the vehicle is housed or maintained.]

Retention: Until vehicle or equipment is no longer under municipal control or life of vehicle or equipment + 1 year

C. Work Orders

Documentation of requests and authorizations for vehicle and equipment work.

Retention: 2 years, unless work order provides the only available vehicle history, in which case it should be retained for life of vehicle or equipment + 1 year

Cross References

- Agreements and contracts – 40.030, Agreements and Contracts
- Auction records – 30.030.B, Disposition Records
- Communication systems – 55.010, Communication Systems Records
- Computer systems – 55.020, Computer System Records
- Correspondence and general documentation – 40.100, Correspondence and General Documentation
- Fire department apparatus – 100.050.B, Apparatus Inspection Records
- Insurance – 105.010, Insurance Records
- Inventories – 30.030.C, Inventories
- Policies and procedures – 40.220, Policies and Procedures Documentation
- Purchasing – 30.170, Purchasing Records
- Reports – 40.290, Reports
- Rules, regulations and standards – 40.310, Rules, Regulations and Standards