	POLICY NUMBER PM-001
POLICY TITLE: Fleet Equipment Return Policy and Procedure	
APPROVED: 6/2/2021	DATE OF REVISION: 6/2/2022
AUTOR: O.Kalinin APPROVER: O.Popovych, T.Popovych, T.Giorgadze	Pages - 5

Fleet Equipment Management Policy and Procedure

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General Overview


The Employees who are involved in fleet inventory management must remember that all equipment is a Company property entrusted to the department for legitimate and prudent use. Drivers, and Owners Operators are responsible for the Fleet Equipment they are using. This includes timely preventive maintenance as well as the proper and safe use of the equipment.

This policy refers to the receipt, tracking and disposal of all Company-owned Fleet Equipment Inventory.

It is Company's policy to ensure inventory duties are properly segregated to prohibit the same employee who authorized a purchase of property or material from verifying delivery of the product and adding it to inventory.

Scope

This policy applies to all Fleet Equipment Inventory owned by The Company. Primary responsibility for adherence rests with Terminals, Divisions, and Offices of The Company. Day-to-day responsibility for adherence to this policy rests with the Property Manager (as determined by the Board). The items set

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forth in this policy are minimum requirements. Nothing in this document prohibits additional requirements being imposed should the Board deem it necessary.

Fiscal Analysis


The Company's financial investment in its inventory is substantial. Adherence to this policy will improve asset tracking and accountability, as well as aid in reducing the funds used to make unnecessary purchases.

I. Fleet Equipment Inventory – General Information

Fleet Equipment is Company owned motorized and non-motorized equipment primarily used to provide function and support to business needs of the Company. All Fleet Equipment is tracked in the Enterprise Information Management System (HELIX) from the time it is received until the item is disposed. Disposed equipment remains in Helix indefinitely.

II. Fleet Equipment Included and Entered into Inventory

- A. Purchased Fleet Equipment, regardless of cost, must be received into the HELIX at the actual purchase price.
 1. Any hardware, subassemblies and permanently affixed or permanently assigned attachments specific to a sole piece of equipment will be captured as a part of the modified unit. These items will be included in the cost of the unit.
 2. Attachments that are not permanently affixed and are capable of being transferred to another piece of equipment shall be given a separate equipment number and the cost segregated accordingly.
- B. Partially fabricated Fleet Equipment (where the Company forces permanently modify an existing piece of equipment for departmental needs) shall be received into the HELIX at the initial purchase price and a modification work order will be opened to capture the additional fabrication costs.
 1. Upon completion of the Fleet Equipment modification, the equipment modification repair order will be closed; in this way, all material costs and labor costs are applied to the equipment total value.
- C. Total fabrication of a piece of Fleet Equipment (where Company forces completely assemble an equipment asset) shall be received into the HELIX. An equipment number shall be assigned and a fabrication repair order is opened.

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1. Upon completion of the Fleet Equipment fabrication, the fabrication repair order will be closed; in this way, all material costs and labor costs are applied to the equipment total value.
- D. Rental / Leased equipment (not Company owned equipment) is not received into the HELIX; however, any consumable inventory (e.g. lubricants, stock material) and labor used to service the equipment must be recorded accurately in HELIX.

III. Fleet Equipment Inventory Numbers


- A. Upon receipt into the HELIX, all Fleet Equipment is assigned a digit asset number within an equipment category.
 1. An asset number is given automatically by accessing HELIX and completing the equipment acquisition form.
 2. The Property Management Department is responsible for entering all relevant equipment purchase information into the HELIX.
- B. Upon receipt of the asset number, the Warehouse Operator will need to enter specific information into the HELIX (e.g. service intervals, assigned drivers etc)

IV. Inventory Record Activities

- A. To ensure Company's Fleet Equipment inventory is adequately tracked and current values reported, each Terminal Manager and Central Office shall utilize HELIX to maintain a perpetual inventory.
 1. Once Fleet Equipment is received into the HELIX, it is the responsibility of the Property Manager to assure all equipment usage (repair orders, transfers, labor, parts and disposal) is recorded accurately.
- B. Each Terminal and Central Office location must perform a physical inventory certification and reconciliation annually at the direction of the Finance Department. This will consist of running a report via the HELIX, reviewing the data and conducting a physical count to certify that what is in the HELIX is currently on inventory.
 1. Supporting documentation to the certification must remain on file at the Terminal or Central Office location for four (4) years plus the current year.

V. Disposal

- A. Once a Terminal or Central Office determines an asset is no longer useful to the Department, it becomes surplus inventory. This determination shall be made by the Terminal or Central Office Warehouse Operators, with the final determination being made by the Property Manager. This will ensure that the Fleet Equipment is meeting one of

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three basic criteria: active, obsolete, worn-out or surplus (with the exception of stolen or traded-in Fleet Equipment).

- B. When illegal activity and/or wrongdoing by an employee or contractor is suspected, it should be reported to the Property Manager and the Operations VP.
- C. Fleet Equipment classified as Stolen, regardless of cost, must have the following steps taken by the responsible person:
 1. Contact your immediate Supervisor, Driver Coordinator in case you are the Driver or Owner operator or inform a Terminal / Property Manager for further direction. You may be requested to file a State Highway Patrol Report by contacting your local State Highway Patrol post.

VI. Modes of Disposal for Fleet Equipment

- A. Interdepartmental Transfers. The Company shall transfer excess equipment to other Terminals within the Department as needed.
- B. Public Sale, offered to the general public via an auction. Auction Announcements must also be published on the Company's primary website. It is a Property Manager's responsibility to publish notice of the auction on the Company primary website.
- C. Trade-in. When it is found to be economical for the Company to trade-in fleet equipment for a newer, updated piece of equipment the trade-in must be disposed in the HELIX at the time of the trade-in.


Fleet Release and Return Procedure

The Property Manager in cooperation with Fleet Manager and Operations Director shall design the process of Fleet Equipment release and return, collect all necessary approvals and publish it on the Company internal web page including all relevant information, instructions and forms.

Fleet Release and Return Procedures are an established way of fleet equipment releasing and returning and are an integral part of the Fleet Equipment Management Policy.

The List of Equipment shall be created based on the Fleet and Operation Departments requirements and recommendations and should be used as a template for the HELIX standard List of Equipment report. This report shall be retrieved from the HELIX and used as a Checklist during the Inventory, Fleet equipment Release and Fleet Equipment Return processes.

All units shall pass through the inventory check before releasing or returning Fleet Equipment. The inventory shall be conducted by the Warehouse Operator at the Terminal or empty warehouse trailer bay

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in presence of the Driver or Owner Operator. Fleet Equipment Release or Return shall be scheduled by the Driver Coordinator and agreed with the Warehouse Operator well in advance.

ADDENDUMS

[Fleet Equipment Release Process Flow](#)

[Fleet Equipment Return Process Flow](#)

[Fleet Audit, Operations part](#)

[Fleet Audit, Fleet part](#)

[Dormant report, System solution to track Units](#)