Before the visit

Use this procedure as a preparation and handover template. An unchecked item remains open. This published procedure is not certification or evidence of past compliance.

ORGANISATION / SITE

VISIT DATE / REFERENCE

PRIMARY CONTACT / PHONE

APPROVAL CONTACT / METHOD

01 Verify the vehicle and its history

UNIT ID / LICENCE PLATE

MAKE / MODEL / YEAR

VIN OR VEHICLE REFERENCE

LAST KNOWN ODOMETER (KM) / DATE

- ☐ Identity matches the service request
- ☐ Service history reviewed or gap recorded
- ☐ Applicable schedule / requirements checked
- ☐ Known issues and previous findings reviewed

02 Agree the scope and access

- ☐ Requested tasks and exclusions are clear
- ☐ Vehicle location and access are confirmed
- ☐ Service window and availability are agreed
- ☐ Required specification / parts are identified

REQUESTED SCOPE, EXCLUSIONS AND OPEN ITEMS

At the vehicle

Confirm the details before starting. Record authorised work as it happens and seek further approval when the scope changes.

VISIT / UNIT REFERENCE

DATE / TECHNICIAN

03 Confirm and obtain approval

- ☐ Vehicle identity and odometer confirmed
- ☐ Visible concerns / history gaps recorded
- ☐ Scope, exclusions and approval confirmed
- ☐ Site access and work conditions assessed

ODOMETER AT VISIT (KM)

APPROVED BY / TIME / METHOD

APPROVAL REFERENCE, LIMITS AND SCOPE CHANGES

04 Record the work and materials

Task performed / status	Part, product or specification	Quantity / unit	Record / time

For additional work: record the finding, obtain approval and update the scope before proceeding.

Close the loop

Make the outcome understandable for the fleet contact. Record outstanding work and the next step, including the basis for any interval or recommendation.

VISIT / UNIT REFERENCE

COMPLETION DATE / TIME

05 Document the findings

Finding / supporting record	Action taken or outstanding item	Next step / owner

06 Complete the handover

- ☐ Completed and deferred tasks identified
- ☐ Odometer and service date recorded
- ☐ Work record / invoice reference provided
- ☐ Parts / products and quantities recorded
- ☐ Findings and scope changes explained
- ☐ Next step and responsible person agreed

NEXT STEP / DUE DATE OR KM

BASIS: SCHEDULE, FINDING OR AGREED FOLLOW-UP

RECORD SHARED WITH / DATE

WORK ORDER / INVOICE / ATTACHMENT REFERENCE