

Review Vehicle Documentation

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Permissions


You will require the following permissions:

- My Team's Duty of Care Documents

Review Vehicle Documentation


1. Navigate from the Home page to My Team's Duty of Care Documents.
2. Click on My Team's Vehicle Documents (Awaiting Review). This will display a list of all of the vehicle documents that you are an approver for.

My Team's Vehicle Documents (Awaiting Review)							
Vehicle Document							
My Team's Vehicle Documents (Awaiting Review)							
		(VehicleEmployee ID) Employee Full Name ▲	(VehicleEmployee ID) Username	(Vehicle) Registration Number	Document type	Expiry date	Status
		Alex Earle	Alex	YX06XCS	Breakdown Cover	01/03/2022	Awaiting Review
		Alex Earle	Alex	YX06XCS	Insurance	01/03/2022	Awaiting Review

Note: A vehicle document and any associated review records can be deleted by clicking .

The tabs at the top of this article will provide you with more detail about how to review the different types of vehicle documentation.

Breakdown Cover

1. Click on the  icon adjacent to the Breakdown Cover document which requires approval. This will display the Review Form which outlines the details of the vehicle, owner and document.
2. Complete the following fields:

Feature	Description
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Feature	Description
Status*	The reviewed status of the vehicle's breakdown cover. Select whether the status should be set as 'OK' or 'Failed'.
Reviewer notes	Enter relevant notes. This is useful to help the claimant understand why their status may have been set as failed.

3. Click **Save** to confirm the document review.


Note: When a claimant has uploaded a new Duty of Care document, the approver will receive a system generated email advising of this and prompting them to take action. Also, due to the hierarchical structure within your system, an approver's line manager(s) also has full functionality over all Duty of Care documentation.

Additional Information

- If a claimant edits and saves a duty of care document after it has already been approved, the current document review is invalidated and an email will be sent requesting a new review. The claimant will be unable to claim mileage until the review has been completed and marked as "Reviewed - OK".

Note: If an approver edits a duty of care document after it has already been approved, the email to request a review will not be sent, as the modification has been made by the reviewer.

Insurance

1. Click on the  icon adjacent to the Insurance document which requires approval. This will display the Review Form which outlines the details of the vehicle, owner and document.
2. Check that all fields and uploaded documents are in line with your organisation's policies. The vehicle details can be checked by visiting <https://www.vehicleenquiry.service.gov.uk>.
 - Use the information from the Overview section to complete the following fields:

Feature	Description
Status*	The reviewed status of the vehicle's insurance. Select whether the status should be set as 'OK' or 'Failed'.

Feature	Description
Reviewed by*	Enter the name of the user carrying out the review.
Reviewer notes	Enter relevant notes. This is useful to help the claimant understand why their status may have been set as failed.

3. Click **Save** to confirm the document review.


Note: When a claimant has uploaded a new Duty of Care document, the approver will receive a system generated email prompting them to take action.

Additional Information

- If a claimant edits and saves a duty of care document after it has already been approved, the current document review is invalidated and an email will be sent requesting a new review. The claimant will be unable to claim mileage until the review has been completed and marked as "Reviewed - OK".

Note: If an approver edits a duty of care document after it has already been approved, the email to request a review will not be sent, as the modification has been made by the reviewer.

MOT

1. Click on the  icon adjacent to the MOT document which requires approval. This will display the Review Form which outlines the details of the vehicle, owner and document.
2. Click on the vehicle enquiry link (<https://www.vehicleenquiry.service.gov.uk>) to confirm the vehicle's MOT status. You will be required to enter the following information:
 - Registration Number
 - Vehicle Make
3. Use the information from the Overview section and link above to complete the following fields:

Feature	Description
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Feature	Description
Status*	The reviewed status of the vehicle's MOT. Select whether the status should be set as 'OK' or 'Failed'. Note: If Vehicle Check is enabled, MOT documents will be automatically recorded when a vehicle is added and will not require review. The document status will appear as 'Automatic Lookup' within 'My Team's Vehicle Documents (All)'.
Reviewed by*	Enter the name of the user carrying out the review.
Reviewer notes	Enter relevant notes. This is useful to help the claimant understand why their status may have been set as failed.

4. Click **Save** to confirm the document review.

Note: When a claimant has uploaded a new Duty of Care document, the approver will receive a system generated email advising of this and prompting them to take action. Also, due to the hierarchical structure within your system, an approver's line manager(s) also has full functionality over all Duty of Care documentation.

Additional Information

- If a claimant edits and saves a duty of care document after it has already been approved, the current document review is invalidated and an email will be sent requesting a new review. The claimant will be unable to claim mileage until the review has been completed and marked as "Reviewed - OK".

Note: If an approver edits a duty of care document after it has already been approved, the email to request a review will not be sent, as the modification has been made by the reviewer. Also note that if the reviewer is different, it may invalidate the document. It will need to be set to 'Reviewed - OK' again.


Due to the COVID-19 pandemic, the Government has decided that from 30th March 2020, MOT due dates for cars, motorcycles and light vans will be extended by 6 months to help prevent the spread of coronavirus. It is important that reviewers edit and extend the MOT date by 6 months for MOT that will expire **on or after 30/03/2020**. This applies to companies who do not have

Automatic Lookup enabled.

Start date*	15/05/2020		Expiry date*	15/04/2021	
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In the example above, the reviewer must set the 'Expiry Date' to 15/10/2020 by clicking the field and selecting the date.

Service

1. Click on the  icon adjacent to the Service document which requires approval. This will display the Review Form which outlines the details of the vehicle, owner and document.
2. Check that all fields and uploaded documents are correct, in line with your organisation's policies. The vehicle details can be checked by visiting <https://www.vehicleenquiry.service.gov.uk>.
3. Use the information from the Overview section to complete the following fields:

Feature	Description
Status*	The reviewed status of the vehicle's service document. Select whether the status should be set as 'OK' or 'Failed'.
Reviewed by*	Enter the name of the user carrying out the review.
Reviewer notes	Enter relevant notes. This is useful to help the claimant understand why their status may have been set as failed.

4. Click **Save** to confirm the document review.

Note: When a claimant has uploaded a new Duty of Care document, the approver will receive a system generated email advising of this and prompting them to take action. Also, due to the hierarchical structure within your system, an approver's line manager(s) also has full functionality over all Duty of Care documentation.


Additional Information

- If a claimant edits and saves a duty of care document after it has already been approved, the current document review is invalidated and an email will be sent requesting a new review. The claimant will be unable to claim mileage until the review has been completed

and marked as "Reviewed - OK".

Note: If an approver edits a duty of care document after it has already been approved, the email to request a review will not be sent, as the modification has been made by the reviewer.

Tax

1. Click on the  icon adjacent to the Tax document which requires approval. This will display the Review Form which outlines the details of the vehicle, owner and document.
2. Click on the vehicle enquiry link (<https://www.vehicleenquiry.service.gov.uk>) to confirm the vehicle's MOT status. You will be required to enter the following information:
 - o Registration Number
 - o Vehicle Make
3. Use the information from the Overview section and link above to complete the following fields:

Feature	Description
Status*	<p>The reviewed status of the vehicle's tax document. Select whether the status should be set as 'OK' or 'Failed'.</p> <p>Note: If Vehicle Check is enabled, Tax documents will be automatically recorded when a vehicle is added and will not require review. The document status will appear as 'Automatic Lookup' within 'My Team's Vehicle Documents (All)'.</p>
Reviewed by*	Enter the name of the user carrying out the review.
Reviewer notes	Enter relevant notes. This is useful to help the claimant understand why their status may have been set as failed.

4. Click **Save** to confirm the document review.

Note: When a claimant has uploaded a new Duty of Care document, the approver will receive a system generated email advising of this and prompting them to take action. Also, due to the hierarchical structure within your system, an approver's line manager(s) also has full functionality over all Duty of Care documentation.

Additional Information

- If a claimant edits and saves a duty of care document after it has already been approved, the current document review is invalidated and an email will be sent requesting a new review. The claimant will be unable to claim mileage until the review has been completed and marked as "Reviewed - OK".

Note: If an approver edits a duty of care document after it has already been approved, the email to request a review will not be sent, as the modification has been made by the reviewer.
