HELP DESK NOTES

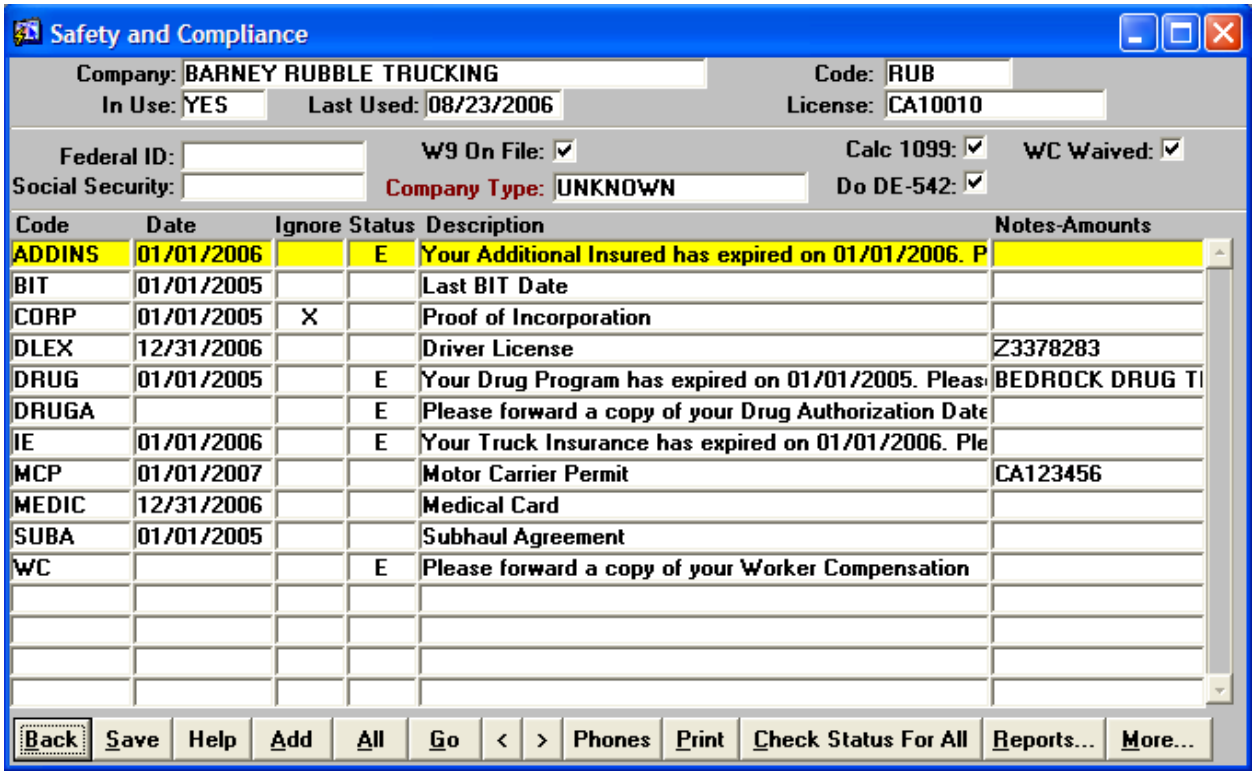
SAFETY-COMPLIANCE 0

MORE OPTIONS 1
SAFETY-COMPLIANCE REPORTS 2
Certification of Compliance 2
Driver Safety Meeting Sign In Sheet 2
Drug Authorization Date Report 2
Drug Date Expiration Report For Independent Contractors 2
Drug Programs For Independent Contractors 2
Insurance Expiration Dates For Independent Contractors 2
Preview This Notice 2
Safety Info For Current Independent Contractors 2
Safety Information For I.C.s Due Statements 2
Safety Notices That Need Printed 3
Shop Safety Meeting Sign In Sheet 3
State Compensation Insurance Fund (Worker Comp) 3
Sub haul Agreement 3
Worker's Compensation Waiver 3

Safety-Compliance

One of the least favorite tasks, yet the most important is the duty of ensuring your Independent Contractors (Subhaulers) have up to date proof of insurance and other information on file. Since time is often short, wading through files and organizing who needs what is often put aside and could place your company in jeopardy.

The Safety and Compliance Screen provides an expedient method of entering and reviewing pertinent information on your Independent Contractors. When the screen is entered, all independent contractors are queued up alphabetically with the first one appearing. You may scroll through the companies by pressing the up and down arrows or go directly to a company by using the [**Go**] button.



The [**Back**] button exits the Safety and Compliance Screen. Press [**Save**] to commit any changes that have been made. Use the [**<**] and [**>**] buttons to scroll through the information. To position the file to a certain Independent Contractor, press [**Go**]. Note that after pressing [**Go**], the file is locked on the one Independent Contractor. To resume scrolling, press the [**All**] button.

Click on [**Print Notice**] to print a notification letter for the company on the screen. An entry is made on the Independent Contractor's history tab that a notification has been printed. [**Check Status For All**] Click on this button to check the status for all Independent Contractors. The **[Reports…]** and **[More…]** buttons contain additional options.

The [**Help**] button provides help for first-time users. The **[Add]** button is used to add an additional item to check for the I.C. displayed on the screen. Click on the **[Print Notice]** button to print the notification sheet for the I.C. displayed on the screen.

More options

Select the [**More…**] button to use the following options.

Custom Settings

There are currently two styles of notification letters. One prints with your company logo at the top. This option allows you to select the preferred style.

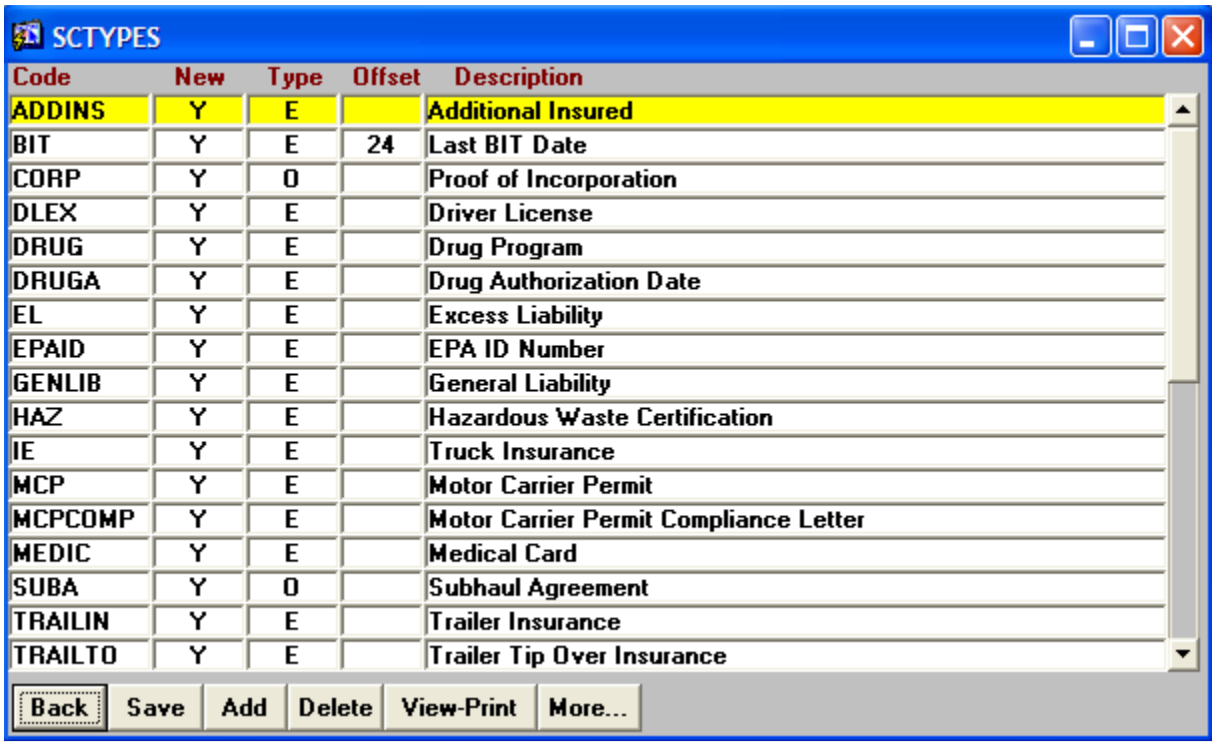
Fill All I.C.s With Missing Codes

This option examines each I.C. and fills the items to track with any that exists in the codes table that are not listed under each I.C.

Fill This I.C. With Missing Codes

This option examines the I.C. displayed on the screen and fills the items to track with any that exists in the codes table that are not listed under the I.C.

Safety-Compliance Codes



The safety-compliance items to check are user-specified. If you have something new to check, click on the [Add] button and give it a code. Enter "Y" in the *New* column if all new companies are to be given the item to check. The types of codes are:

E: the item has an expiration date.

O: the item simply needs to be noted that it is in the office.

I: the item is for information only. The item appears on the safety-compliance notice that gets printed as well as on the subhaul statements.

Safety-Compliance Reports

Certification of Compliance

This option prints a fill in the blank form for your Independent Contractors to sign and return to you that states they will notify your company in the event their motor carrier permit is suspended, revoked or otherwise rendered invalid.

Driver Safety Meeting Sign In Sheet

This report produces a sign in sheet for all of your active drivers.

Drug Authorization Date Report

Have your Independent Contractors sign a letter authorizing your company to call their drug consortium to be sure they are still enrolled. This report checks the date the authorization was signed and received.

Drug Date Expiration Report For Independent Contractors

This report lists all active Independent Contractors, then groups them by the companies that have an expired drug date, that will expire in 30 days, will expire in 60 days, then the others.

Drug Programs For Independent Contractors

This report lists all active Independent Contractors and displays the drug expiration date and the drug program they are enrolled in.

Insurance Expiration Dates For Independent Contractors

This report analyzes all insurance dates per Independent Contractor and lists in expiration date order the following fields; expiration date, type of insurance and company name.

Preview This Notice

This report views the notice to the Independent Contractor of items that are a concern.

Safety Info For Current Independent Contractors

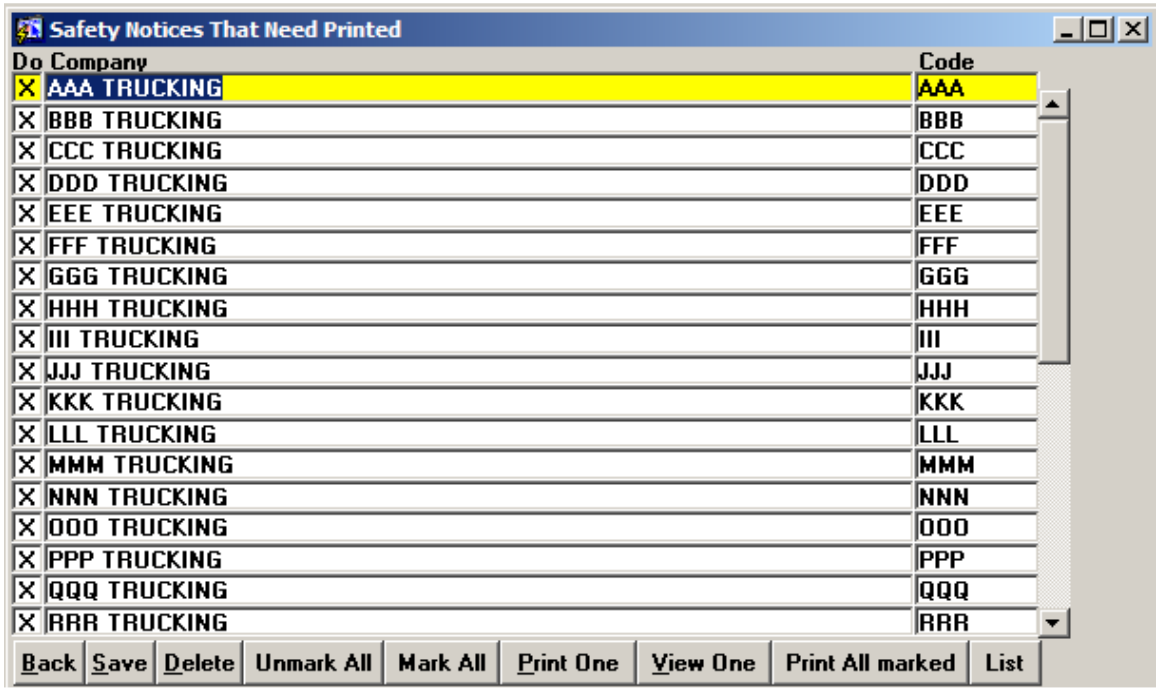
When this report is executed, a screen appears that prompts for the current as of date. When freight bills are entered, the last used date is updated for each Independent Contractor. Then, the following fields are displayed; company name, last used, insurance expires, insurance amount, drug date, motor carrier permit expiration date, driver license expiration date, medical card expiration date and the year the company incorporated.

Safety Information For I.C.s Due Statements

This report finds the Independent Contractors that are due a pay statement. Then the following information is displayed on a landscape report; Company Name, Subhaul Agreement Date, Insurance Expiration Date, Insurance Amount, Additional Insured Expiration Date, Drug Program Date, Motor Carrier Permit Expiration Date, Motor Carrier Compliance signed, Driver License Expiration Date, Medical Card Expiration Date, Worker Compensation Date or note of waiver and for incorporated companies, the year of incorporation.

Safety Notices That Need Printed

When this option is selected, a screen appears with all of the Independent Contractors that are missing required information, have an expired date, or a date that is about to expire.



Press the [**List**] button to print a listing. [**Print One**] prints a safety notice for the highlighted company. [**Print All Marked**] prints a safety notice for all companies that have an "X" in the Do column.

Shop Safety Meeting Sign In Sheet

If you have safety meetings for your shop personnel, print this report to have them sign in for attendance recording purposes.

State Compensation Insurance Fund (Worker Comp)

This report lists all active Independent Contractors and displays the drug expiration date

Sub haul Agreement

This report lists all active Independent Contractors and displays the drug expiration date

Worker's Compensation Waiver

This report lists all active Independent Contractors and displays the drug expiration date