

ENCOMPASS® - DRIVER QUALIFICATION



Table of Contents

- Update Driver Qualification File 3
 - Finding Employee and Viewing Driver Qualification File4
 - Driver Qualification Information Section8
 - License Information.....11
 - Driver Equipment Information.....14
- Prequalification Checklist 16
 - About the Prequalification Checklist17
 - Edit Full Checklist18
 - Edit Individual Checklist Items21
 - Adding an Attachment23
 - Adding Ad Hoc Checklist Items24
- Maintenance Checklist 26
 - About the Maintenance Checklist.....27
 - Edit Full Maintenance Checklist28
 - Edit Individual Checklist Items30
 - Qualified Driver View.....32
 - Adding an Ad Hoc Checklist Item.....33
- Reports & Forms 35
 - Common Reports & Forms.....36

Update Driver Qualification File

Finding Employee and Viewing Driver Qualification File

General Overview

Once basic information for the Employee has been added, their driver qualification files are ready to be processed. The **Driver Qualification** tab contains important information in regards to driver qualification, license information, driver equipment information, pre-qualification & maintenance checklist items, and safety performance history information.

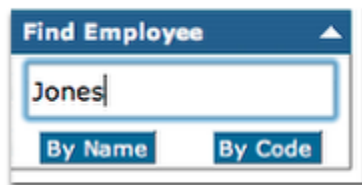
Tip: Searching by Name

When searching by name or by code, only a portion of the name or code is needed. Here are some examples:

- Type the value "Allen," the system results could be: Robert Allen and Allen Clark.
- Type the value "Nort", the system results could be: Samuel Norten, Norton Billings, and Janet North.
- Type the value "12" into the Employee Code search, the system results could be: 12765, 5312 and 991287.

Note: When using the Find Employee search method, a keyboard shortcut can be used by using the TAB key instead of the mouse. Tab once and enter By Name and Tab twice and enter By Code.

To find an employee by name



1. From the **Employee** tab, locate the **Find Employee** feature on the left side of the screen.
2. Enter a name, or portion of a name, in the text box. Click **By Name** to run the search and display the results.

-OR-

To find an employee by employee code

1. Enter an employee code, or a portion of a code, in the text box.
2. Click the **By Code** button to run the search and display the results.

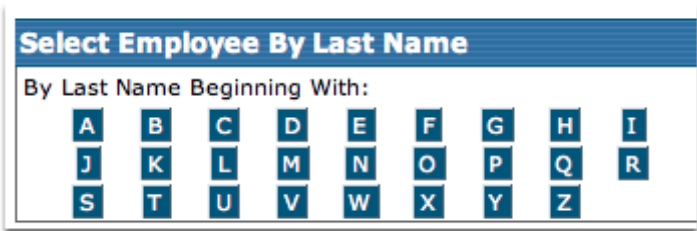
To View Employees using Common Views



There are several common views:

- 1. **All Employees List** - This list contains active and inactive employees. It does not include "terminated."
- 2. **Drivers Currently Not Qualified** - This contains employees with the Not Qualified checkbox checked (meaning "Not Qualified"). It also will contain employees with expired qualification items needed for qualification.
- 3. **Employees With Expired Qualification Items** - This list contains employees with expired maintenance checklist items. This includes any and all expired maintenance checklist items (not just those needed for qualification).
- 4. **Employees with DQ Files Expiring in 30/60 Days** - These alerts contain employees with items coming due in 30 or 60 days. It also contains the employees with expired items.

To View All Employees under Rolodex



Click on a *Letter* under Select Employee By Last Name.

Note: This listing will be ONLY active employees. There will be no inactive or terminated employees in these views.

Tip: Select View

DRIVER MANAGEMENT

VEHICLE MANAGEMENT

PERFORMANCE MANAGEMENT

Home

Employees

Driver Qualification

Alcohol & Drug

Accident/Incident

Traffic

5 Page

▲

By Code

▲

Driver Qualification

[Add New Employee](#)

Select View:

Drivers Currently Not Qualified

Go

Customize...

Print

Employee Name ▲	Employee Code
D2, CA	CD2
Doe, John	ID101

When viewing a list of employees, the results can be changed by using the Select View: option.

Tip: Sort by Column

Driver Qualification

[Add New Employee](#)

Select View:

All Employees DQ

Go

Customize...

Print

Employee Name ▲	Employee Code	Company Level
Abraham, Jacob	433540-23	Jeff's Encompass
Anderson, Pamela	PAnderson	Southern
Anniston, Jen	JAnniston	Nothern - W Parking Lot
BRIDGES, JEFF	JBRIDGES	Admin
Christie, Julie	JChristie	Northern
Clooney, George	GClooney	Northern
Confidential, Ann	AConfid	Jeff's Encompass
CustomField, Mike	CustField	Jeff's Encompass
DeleteMe, John	DelMe	Jeff's Encompass

To Sort by a particular column, click on the Column Heading -- e.g. Employee Name.

Getting to their Driver Qualification File

Once the proper employee has been found, click on their name to view their Driver Qualification file.

Driver Qualification

Add New Employee

Select View: Drivers Currently Not Qualified Go Customize... Print

Employee Name ▲	Employee Code	Company Level
Doe, John ←	JD101	Guides Presentation

The Driver Qualification File page will look something like this:

View Driver Qualification - John Doe

Personal Information Edit...

Driver Qualification Information Edit...

Date Initially Qualified:

Currently Qualified? No

Disqualified on:

Comments:

Is on Probation? No

Probation Period: -

Probation Comments:

Has Restrictions? No

Restriction Period: -

Restriction Comments:

License Information Edit...

License WI XXXX-XXXX-XXXX-02 Expiration Date 10/10/2020

License Class CDL - C

Endorsements Endorsement: Combo Haz Mat / Tank

Endorsement: Double/Trip Trailer

Endorsement: Hazardous Materials

Notes 4/11/2019 (DU): General Note

Driver Equipment Information Edit...

Authority (Not Specified)

Dispatch Range (Not Specified)

Powered Units

Towed Units

Prequalification Checklist Edit Full List... Add Attachment... Add New...

Maintenance Checklist Edit Full List... Add Attachment... Add New...

MVR Scoring Add New...

MVR Date	Review Date	Score	Rating
----------	-------------	-------	--------

Driver Qualification Information Section

The top of the Driver Qualification view page will show an area that can be expanded to see the personal information of the driver. This is pulled from the Employees tab. The double black arrows can be clicked to expand or collapse this section.

The next section is the Driver Qualification Information.

- **Date Initially Qualified** - The date that the employee was first qualified.
- **Currently Qualified?** - On the Edit screen, this is a check box. Check the **Not Qualified** box if the employee is not qualified. Add the not qualified date and relevant notes if applicable.
- **Is on Probation?** - Enter the start and end date of the probation period and relevant notes if applicable.
- **Has Restrictions?** - Enter the start and end date of the restrictions period and relevant notes if applicable.

View Driver Qualification - John Doe

Personal Information

Edit...

⌵

Driver Qualification Information

Edit...

⌴

Date Initially Qualified:

Currently Qualified?

No

Disqualified on:

Comments:

Is on Probation?

No

Probation Period:

-

Probation Comments:

Has Restrictions?

No

Restriction Period:

-

Restriction Comments:

Currently Qualified

The Encompass system always defaults this flag to **No**. Even when it appears all is in order and every item is completed, this flag might still be **No**. The system takes a very conservative approach to qualification requiring the user to determine when a driver is qualified or not.


Within the Maintenance Checklist, however, the system administrator can set specific checklist items to be required for qualification. This means the item must be completed (not set to null and no overdue) for the system to see it as done. When the system sees all required items are completed, there will be a prompt on the screen to **qualify** the driver. The system will not determine this for the user.



i *Note: Once any maintenance item required for qualification is overdue, Encompass will then flip the **Currently Qualified** flag back to **No**.*

Currently Qualified?	No
Disqualified on:	
Comments:	


Probation and Restrictions

Both of these areas are here for informational purposes and are temporary in nature. They do not play into qualification, alerts or other functional aspects. If an employee is on probation, the system will not alert the user when the probation is over.

 **Warning:** If the user puts any notes in these areas while the employee is on probation or restricted, the notes and dates are deleted when the driver is taken off of probation or restriction.

Is on Probation?	No 
Probation Period:	-
Probation Comments:	
Has Restrictions?	No 
Restriction Period:	-
Restriction Comments:	

Tips and Tricks

 It's best to use this area carefully. Use the checklist items to help determine if the driver is qualified as opposed to just manually changing **Currently Qualified?** to **Yes**.

If the user chooses to use the **Probation** and **Restriction** areas, be aware that the notes will be wiped out the moment the employee is taken off of **Probation** or **Restriction**. It may be best to save the notes elsewhere (i.e., **Employee Tab**) before changing the flag.

Note: Many users have tried to keep track of their qualified drivers by using the flag alone, ignoring all of the required maintenance checklist items. After qualifying their drivers (sometimes hundreds of them), the next day the drivers will all be switched to **Not Qualified**. This happens because the system determines the required maintenance checklist items are null or overdue and changes the **Currently Qualified** flag to **No**.

License Information

There are two main places where driver's License Information can be added: Employee Tab and Driver Qualification Tab. This section will address the Driver Qualification Tab.

The License Information section shows up directly after the Qualification Information. To update the License Information, click the Edit button.

License Information		Edit...	⬆
License	Expiration Date		
License Class	(Not Specified)		
Endorsements			
Notes			

Fill in or modify the fields:

- 1. **State** - Use the drop-down provided to select the state.
- 2. **Expiration Date** (format as mm/dd/yyyy or mm-dd-yyyy or use the calendar) - Enter the next date it's due.
- 3. **Class** - Use the drop-down provided. *Note: This field is setup by an Administrator. If the user is an administrator, there will be an icon to the right of the field with a red plus sign. This list can be manipulated if that icon is clicked.*
- 4. **License Number** - Type in the license as it appears on the license. This is important if the system is being used to order Motor Vehicle Reports via a third party.
- 5. **Endorsements** - Here, multiple checkboxes can be selected as the driver could have multiple endorsements. If there is an endorsement item missing from this list, it can be edited via **Setup > License Endorsement Type** (under Maintain Lookups in the left column on the setup page) by an administrator.
- 6. **Notes** - Although the notes area is large, it's best if short, informational phrases are used. These notes show up on a few reports, but the notes can cut off at a certain point. The shorter the notes, the better.

Click **Save** once all necessary information is entered.

Edit License Info - John Doe

Shaded Fields are Required

Save
Cancel

1

State

WI

2

Expiration Date

10/10/2020

3

Class

CDL - C

4

License Number

A215-2164-3215-02

5

Endorsements

☒ Endorsement: Combo Haz Mat / Tank
☒ Endorsement: Double/Trip Trailer
☒ Endorsement: Hazardous Materials
☐ Endorsement: Passenger Vehicle
☐ Endorsement: Tank Vehicle
☐ Restriction: Air Brake

6

Notes

4/11/2019 (DU): General Note

Save
Cancel

This is the resulting view:

License Information				Edit...	
License	WI	XXXX-XXXX-XXXX-02	Expiration Date	10/10/2020	
License Class	CDL - C				
Endorsements	Endorsement: Combo Haz Mat / Tank Endorsement: Double/Trip Trailer Endorsement: Hazardous Materials				
Notes	4/11/2019 (DU): General Note				

License Masking

Notice that when the license information is saved, the license number is masked to only show the last 2 digits. The system does this to protect **Personally Identifiable Information (PII)** in accordance with the **Fair Credit Reporting Act (FCRA)**. The full number can still be obtained and is still shown on certain reports, however. The following **Reports and Forms** will offer the option of printing the full values:

Forms

- Driver's Application for Employment (applicants and employees)
- Medical Exam Report
- Medical Exam Certificate
- Motor Vehicle Driver's Certification of Compliance with Driver License Requirement
- Motor Vehicle Driver's Certificate of Violations
- Motor Vehicle Driver's Certification of Violations/Annual Review of Driving Record
- Record of Road Test
- Request for Check of Driving Record

Reports

- Request for Motor Vehicle Report

Driver Equipment Information

This area tracks the driver's authority, dispatch range, and the types of equipment the driver is allowed to operate - e.g., powered and towed units. It should be mentioned that the values here are setup by an Administrator via **Setup** in the Driver Qualification section of the **Maintains Lookups** box.

This area can be really helpful to dispatchers and operations. When each driver has this information entered, the **Employee Authorization Information** report can be run to help dispatchers find drivers with specific skills and capabilities quickly.

This area is located directly below the **Driver License Information** section. Click **Edit** to add or change information listed here.

Driver Equipment Information		Edit...	⬆
Authority	(Not Specified)		
Dispatch Range	(Not Specified)		
Powered Units			
Towed Units			

Select the necessary information:

- 1. **Authority** - Interstate vs. Intrastate
- 2. **Dispatch Range** - 100 Air Mile range, 48 states, 48 States & Canada, etc.
- 3. **Powered Units** - This listing might be setup by vehicle weight and/or type. In the example below, both are included.
- 4. **Towed Units** - This listing might be setup by size or type as well.

Click **Save** once all necessary items are selected.

Edit Equipment - John Doe

Save

Cancel

1

Authority

Interstate

2

Dispatch Range

48 States & Canada

3

Powered Units

☐ < 16 passenger capacity

☐ > or = 16 passenger capacity

☒ 10,001 - 26,000# GVWR or GCWR

☐ Bus

☒ More than 26,000# GVWR or GCWR

☒ Tractor

☒ Truck

☐ Under 10,001# GVWR or GCWR

4

Towed Units

☐ (Not Specified)

☐ 20' Intermodal

☐ 28' Van

☐ 40' Intermodal

☐ 48' Van

☐ 53' Van

☒ Doubles

☒ Flatbed

☒ Full Trailer

☐ Pole Trailer

☐ Reefer

☒ Semi-Trailer

☐ Tanker

☐ Triples

Save

Cancel

The resulting view:

Driver Equipment Information		Edit...	
Authority	Interstate		
Dispatch Range	48 States & Canada		
Powered Units	10,001 - 26,000# GVWR or GCWR		
	More than 26,000# GVWR or GCWR		
	Tractor		
	Truck		
Towed Units	Doubles		
	Flatbed		
	Full Trailer		
	Semi-Trailer		

Prequalification Checklist

About the Prequalification Checklist

The Prequalification Checklist is designed to help in obtaining, completing, and recording DOT and company-specific information when an employee is first hired.

There are two options available when editing this information:

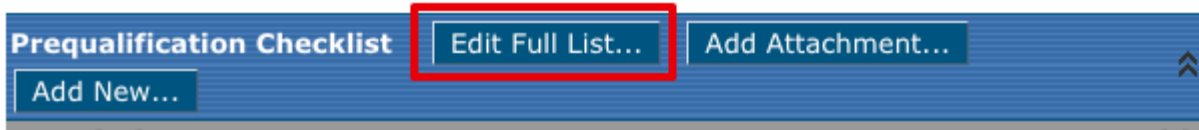
- Edit the entire list at once, which will *not* allow for specific notes to be entered.
- Edit an item individually, which *will* allow for specific notes to be entered.

This area is located directly beneath the Driver Equipment sections. The items shown here are some typical items collected during the hiring process. Since this is configurable, system administrators can choose other items to be included in this list.

Prequalification Checklist			
Add New...		Edit Full List...	Add Attachment...
Description	Date	Status	Multi
Employment Application (391.21)			
Motor Vehicle Report Current State (391.23)			
Motor Vehicle Report Previous States			Add
Previous Employer Verification (391.23)			Add
Medical Exam Certificate (391.43)			
Road Test (391.31)			
Certificate of Road Test (391.31)			
Copy of Operator's License (391.11)			
Skill Performance Evaluation (391.49)			
Entry-Level Driver Training (380.503)			
Entry-Level Driver Training Certificate (380.505)			

Edit Full Checklist

To update the entire list, or multiple items at once, click the **Edit Full List...** button at the top.



The Edit Prequalification List screen will be shown. Fill in the items per the following:

1. **Checklist Item** - The item itself is not editable; this is simply the name of the item.
2. **N/A** - Check **N/A** if the item is not applicable to the employee. If checked, the system will no longer see the item as applicable and will ignore it. *Note: There may be items that have this box shaded out. This means that the administrator has made this item required.*
3. **Date** - Enter the date (mm/dd/yyyy or mm-dd-yyyy format) of process or completion. Either type in the date or use the calendar option next to the field.
4. **Status** - After the date is entered, the status may default to a value for the user. This would be a default value setup by the administrator. If the item remains as **Not Specified**, use the drop-down to select a value -- i.e., Completed, Received, or Issued.

Edit DQ Prequalification List - John Doe

Save
Cancel

1 Name	2 N/A	3 Date	4 Status
Employment Application (391.21)	<input type="checkbox"/>	<input type="text"/>	(Not Specified)
Motor Vehicle Report Current State (391.23)	<input type="checkbox"/>	<input type="text"/>	(Not Specified)
Motor Vehicle Report Previous States	<input type="checkbox"/>	<input type="text"/>	(Not Specified)
Previous Employer Verification (391.23)	<input type="checkbox"/>	<input type="text"/>	(Not Specified)
Medical Exam Certificate (391.43)	<input type="checkbox"/>	<input type="text"/>	(Not Specified)
Road Test (391.31)	<input type="checkbox"/>	<input type="text"/>	(Not Specified)
Certificate of Road Test (391.31)	<input type="checkbox"/>	<input type="text"/>	(Not Specified)
Copy of Operator's License (391.11)	<input type="checkbox"/>	<input type="text"/>	(Not Specified)
Skill Performance Evaluation (391.49)	<input type="checkbox"/>	<input type="text"/>	(Not Specified)
Entry-Level Driver Training (380.503)	<input type="checkbox"/>	<input type="text"/>	(Not Specified)
Entry-Level Driver Training Certificate (380.505)	<input type="checkbox"/>	<input type="text"/>	(Not Specified)

Save
Cancel
Delete All Prequalification Information

Prequalification Checklist

Here's what the list may look like filled out:

Edit DQ Prequalification List - John Doe

SaveCancel

Name	N/A	Date	Status
Employment Application (391.21)	<input type="checkbox"/>	4/1/2019	Completed
Motor Vehicle Report Current State (391.23)	<input type="checkbox"/>	4/5/2019	Received
Motor Vehicle Report Previous States	<input checked="" type="checkbox"/>		(Not Specified)
Previous Employer Verification (391.23)	<input type="checkbox"/>	4/3/2019	Completed
Medical Exam Certificate (391.43)	<input type="checkbox"/>	4/4/2019	Received
Road Test (391.31)	<input checked="" type="checkbox"/>		(Not Specified)
Certificate of Road Test (391.31)	<input checked="" type="checkbox"/>		Issued
Copy of Operator's License (391.11)	<input type="checkbox"/>	4/1/2019	Received
Skill Performance Evaluation (391.49)	<input type="checkbox"/>	4/10/2019	Received
Entry-Level Driver Training (380.503)	<input checked="" type="checkbox"/>		(Not Specified)
Entry-Level Driver Training Certificate (380.505)	<input checked="" type="checkbox"/>		(Not Specified)

SaveCancel

Delete All Prequalification Information

Once all necessary information is entered, click Save.

SaveCancel

Delete All Prequalification Information

Prequalification Checklist

The checklist on the Driver Qualification File page then should look something like this:

Prequalification Checklist			
Add New...		Edit Full List...	Add Attachment...
Description	Date	Status	Multi
Employment Application (391.21)	4/1/2019	Completed	
Motor Vehicle Report Current State (391.23)	4/5/2019	Received	
Motor Vehicle Report Previous States	N/A	(Not Specified)	Add
Previous Employer Verification (391.23)	4/3/2019	Completed	Add
Medical Exam Certificate (391.43)	4/4/2019	Received	
Road Test (391.31)	N/A	(Not Specified)	
Certificate of Road Test (391.31)	N/A	(Not Specified)	
Copy of Operator's License (391.11)	4/1/2019	Received	
Skill Performance Evaluation (391.49)	4/10/2019	Received	
Entry-Level Driver Training (380.503)	N/A	(Not Specified)	
Entry-Level Driver Training Certificate (380.505)	N/A	(Not Specified)	

 The Delete All Prequalification Information button will delete all data and attachments.

Edit Individual Checklist Items

When viewing the Prequalification Checklist, click the name of the checklist item that needs to be updated. For this example, click on **Copy of Operator's License**.

Prequalification Checklist			
Add New...		Edit Full List...	Add Attachment...
Description	Date	Status	Multi
Employment Application (391.21)	4/1/2019	Completed	
Motor Vehicle Report Current State (391.23)	4/5/2019	Received	
Motor Vehicle Report Previous States	N/A	(Not Specified)	Add
Previous Employer Verification (391.23)	4/3/2019	Completed	Add
Medical Exam Certificate (391.43)	4/4/2019	Received	
Road Test (391.31)	N/A	(Not Specified)	
Certificate of Road Test (391.31)	N/A	(Not Specified)	
Copy of Operator's License (391.11)			
Skill Performance Evaluation (391.49)	4/10/2019	Received	
Entry-Level Driver Training (380.503)	N/A	(Not Specified)	
Entry-Level Driver Training Certificate (380.505)	N/A	(Not Specified)	

The Edit Prequalification screen is then shown.

1. **N/A** - Check **N/A** if the item is not applicable to the employee. If checked, the system will no longer see the item as applicable and will ignore it. *Note: There may be items that have this box shaded out (disabled). This means that the administrator has made this item required.*
2. **Date** - Enter the date (mm/dd/yyyy or mm-dd-yyyy format) of process or completion. Either type in the date or use the calendar option next to the field.
3. **Status** - After the date is entered, the status may default to a value for the user. This would be a default value setup by the administrator. If the item remains as **Not Specified**, use the drop-down to select a value -- i.e., Completed, Received, or Issued.
4. **Notes** - While this text box is rather large, only the first line of the note will appear on reports, so it is suggested to make any notes as brief as possible.

Edit Prequalification - John Doe

Copy of Operator's License (391.11)

☐ Not Applicable

1

2

Date:

04/01/2019

3

Status:

Received

4

Notes:

4/1/2019 (user initials): Brief note here.

Save

Cancel

Save & Add Attachment

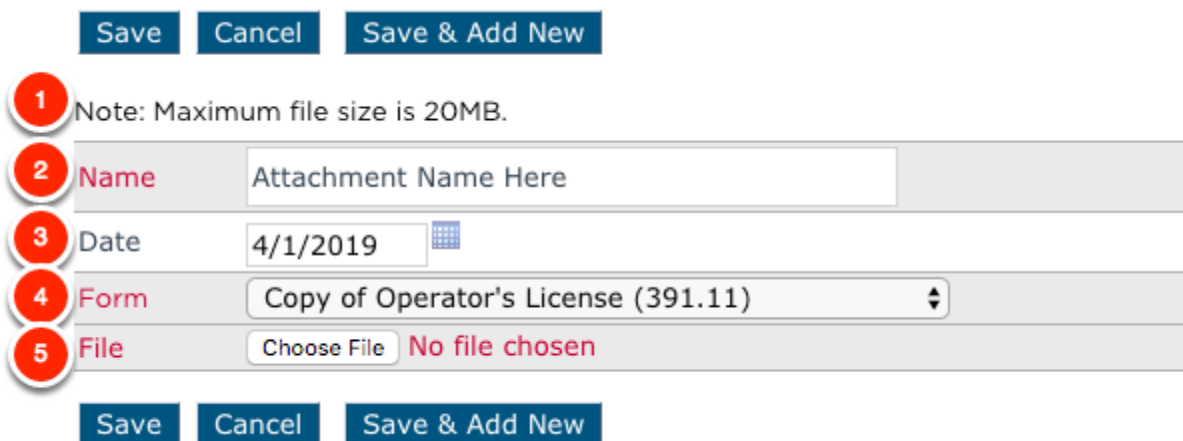
Click Save or Save & Add Attachment when completed.

Adding an Attachment

If **Save & Add Attachment**, the attachment dialogue box will be shown.

1. **Note: Maximum file size...** - This is a warning indicating that the system will not take any attachment larger than 20MB.
2. **Name** - Enter a name for the attachment. This could be the file name or a short description.
3. **Date** - (mm/dd/yyyy or mm-dd-yyyy format or use the calendar icon) Enter the date for the attachment. Some users use the date the document processed and others will use the date the file was uploaded to the system. This is up to personal preference. *Tip: If using the date processed, purging attachments later may be easier especially if the date processed is significantly different from the date the document gets attached. But if the user is attempting to track the cycle time between when a document is completed versus when it gets uploaded to Encompass, the date of the upload should be used.*
4. **Form** - The form is already selected for the user based on the way the screen was entered. This can be left alone. In short, this is the checklist item in question.
5. **File** - Select **Choose File** to browse to the location of the attachment on the users machine.
Note: It's best practice that the file name have no commas (,) as it may result in some viewing issues with particular browsers.

Once the this is properly filled out, click **Save**.



The image shows a screenshot of an attachment dialogue box. At the top, there are three buttons: 'Save', 'Cancel', and 'Save & Add New'. Below these buttons, there are five numbered red circles corresponding to the steps in the list above. Step 1 is a note: 'Note: Maximum file size is 20MB.' Step 2 is a text input field labeled 'Name' with the placeholder text 'Attachment Name Here'. Step 3 is a date input field labeled 'Date' with the value '4/1/2019' and a calendar icon. Step 4 is a dropdown menu labeled 'Form' with the selected value 'Copy of Operator's License (391.11)'. Step 5 is a file selection area labeled 'File' with a 'Choose File' button and the text 'No file chosen'. At the bottom, there are three buttons: 'Save', 'Cancel', and 'Save & Add New'.

Adding Ad Hoc Checklist Items

There may be situations where a checklist item might not apply to an entire group of employees, but instead, apply to an individual. The **Add New...** option is available at the top of the checklist.

To add a single checklist item for an individual employee, click **Add New...** at the top of the list.

Prequalification Checklist				
Add New...		Edit Full List...	Add Attachment...	⬆
Description	Date	Status	Multi	
Employment Application (391.21)	4/1/2019	Completed		
Motor Vehicle Report Current State (391.23)	4/5/2019	Received		
Motor Vehicle Report Previous States	N/A	(Not Specified)	Add	
Previous Employer Verification (391.23)	4/3/2019	Completed	Add	
Medical Exam Certificate (391.43)	4/4/2019	Received		
Road Test (391.31)	N/A	(Not Specified)		
Certificate of Road Test (391.31)	N/A	(Not Specified)		
Copy of Operator's License (391.11)	4/1/2019	Received		
				View Notes
Skill Performance Evaluation (391.49)	4/10/2019	Received		

The user will then be taken to the **Add Ad-Hoc Employee Prequalification** screen.

1. **Checklist Item Drop Down** - This drop-down menu will contain any existing checklist items that have NOT been assigned to this driver's job class yet.
2. **Date** - (Format as mm/dd/yyyy or mm-dd-yyyy or use the calendar tool) The date the item was processed or completed.
3. **Status** - This will auto-fill if the system administrator has set this up. Otherwise, use a drop-down to select a value.
4. **Notes** - While this text box is large, only the first line of the note will appear on reports, so it is suggested to make any notes as brief as possible.

Clic **Save** to store the item, **Save & Add New** to go to another blank ad-hoc page, or **Save & Add Attachment** to this ad-hoc item.

Add Ad-Hoc Employee Prequalification - Driver Name 2

1

Checklist Item:

Entry-Level Driver Training (380.503)

2

Date:

4/9/2019

3

Status:

Completed

4

Notes:

Passed

Save Cancel Save & Add New Save & Add Attachment

Maintenance Checklist

About the Maintenance Checklist

The Maintenance Checklist tracks items that renew and expire over a range of time. The system administrator is responsible for setting these checklists up. Note, the system comes with standard checklist items already indicated in setup. These include items like the **Annual Review**, **Record of Violations**, and **Medical Exam Certificate**.

From the employee's Driver Qualification file, scroll down to the section titled **Maintenance Checklist**.

Maintenance Checklist	Edit Full List...	Add Attachment...	Add New...	⬆
Description	Completed	Due Date		
Record of Violations (391.27)				
Motor Vehicle Report	4/5/2019	4/4/2020		
Annual Review (391.25)				
Medical Exam Certificate (391.43)	4/4/2019	4/3/2021		
Driver's License Expiration Date		10/10/2020		
Six Month Blood Pressure Re-Certification				
One Year Blood Pressure Re-Certification				
3rd Month Blood Pressure Check				
Skill Performance Evaluation (391.49)	4/10/2019	4/9/2021		

If there are items in the Prequalification Checklist that also fall under the renewable or maintenance items, the dates may already be filled in for the user in the maintenance checklist. If there are no Prequalification Checklist items that occur in the Maintenance Checklist, then the completed dates and due dates will be blank.

There are two methods in which the dates for the checklist items can be added:

- Edit the entire list at once, which will *not* allow for specific notes to be entered.
- Edit an item individually, which *will* allow for specific notes to be entered.

Edit Full Maintenance Checklist

To edit the entire list at once, click Edit Full List...



Enter in the necessary information for the for the checklist items:

1. **N/A** - This check box means *not applicable*. The system will ignore an item with this checkbox filled. There may be times when this box is greyed out. This means that the system administrator has set these items as *required* and cannot be marked as not applicable.
2. **Last Completed Date** - (format as mm/dd/yyyy or mm-dd-yyyy) This field is for the last processed date.
3. **Date Due** - (format as mm/dd/yyyy or mm-dd-yyyy) This field is for the next time the item is due. Most system administrators set this up to auto-fill this date based on how frequently this item needs to be renewed (auto-fill dates can be overwritten). If it doesn't auto-fill, enter the date the item is next due.

Edit DQ Maintenance List - John Doe

Save Cancel

Name	N/A	Last Completed	Date Due
Record of Violations (391.27)	<input type="checkbox"/>		
Motor Vehicle Report	<input type="checkbox"/>	4/5/2019	4/4/2020
Annual Review (391.25)	<input type="checkbox"/>		
Medical Exam Certificate (391.43)	<input type="checkbox"/>	4/4/2019	4/3/2021
Driver's License Expiration Date	<input type="checkbox"/>		10/10/2020
Six Month Blood Pressure Re-Certification	<input type="checkbox"/>		
One Year Blood Pressure Re-Certification	<input type="checkbox"/>		
3rd Month Blood Pressure Check	<input type="checkbox"/>		
Skill Performance Evaluation (391.49)	<input type="checkbox"/>	4/10/2019	4/9/2021

Save Cancel Delete Maintenance Information

Click Save.

Save Cancel Delete Maintenance Information

- i** The **Delete Maintenance Information Button** will delete both completion and due dates for the entire list, along with any attachments saved with the items.

Once saved, the Maintenance Checklist may look something like this.

Maintenance Checklist			Edit Full List...	Add Attachment...	Add New...	⬆
Description		Completed	Due Date			
<u>Record of Violations (391.27).</u>		4/4/2019	4/3/2020			
<u>Motor Vehicle Report</u>		4/5/2019	4/4/2020			
<u>Annual Review (391.25).</u>		4/4/2019	4/3/2020			
<u>Medical Exam Certificate (391.43).</u>		4/4/2019	4/3/2021			
<u>Driver's License Expiration Date</u>			10/10/2020			
<u>Six Month Blood Pressure Re-Certification</u>		N/A				
<u>One Year Blood Pressure Re-Certification</u>		N/A				
<u>3rd Month Blood Pressure Check</u>		N/A				
<u>Skill Performance Evaluation (391.49).</u>		4/10/2019	4/9/2021			

Edit Individual Checklist Items

To edit an individual checklist item, click on the name of the checklist item.

Maintenance Checklist			Edit Full List...	Add Attachment...	Add New...	⬆
Description	Completed	Due Date				
<u>Record of Violations (391.27)</u>						←
<u>Motor Vehicle Report</u>	4/5/2019	4/4/2020				
<u>Annual Review (391.25)</u>	4/4/2019	4/3/2020				
<u>Medical Exam Certificate (391.43)</u>	4/4/2019	4/3/2021				
<u>Driver's License Expiration Date</u>		10/10/2020				
<u>Six Month Blood Pressure Re-Certification</u>	N/A					
<u>One Year Blood Pressure Re-Certification</u>	N/A					
<u>3rd Month Blood Pressure Check</u>	N/A					
<u>Skill Performance Evaluation (391.49)</u>	4/10/2019	4/9/2021				

Enter in the necessary information for the checklist item:

1. **N/A** - This check box means *not applicable*. The system will ignore an item with this checkbox filled. There may be times when this box is greyed out. This means that the system administrator has set these items as *required* and cannot be marked as not applicable.
2. **Last Completed Date** - (format as mm/dd/yyyy or mm-dd-yyyy) This field is for the last processed date.
3. **Date Due** - (format as mm/dd/yyyy or mm-dd-yyyy) This field is for the next time the item is due. Most system administrators set this up to auto-fill this date based on how frequently this item needs to be renewed (auto-fill dates can be overwritten). If it doesn't auto-fill, enter the date the item is next due.
4. **Notes** - This field is for any quick notes that may want to be stored with a checklist item. While this text box is rather large, only the first line of the note will appear on reports, so it is suggested to make any notes as brief as possible.

Click **Save** or **Save & Add Attachment**.

Edit Maintenance - John Doe

Record of Violations (391.27)

1

☐ Not Applicable

2

Last Completed("mm/dd/yyyy")

4/4/2019

3

Date Due("mm/dd/yyyy")

04/03/2020

4

Notes:

4/4/2019 (user initials): Short note here.

Save

Cancel

Save & Add Attachment

Qualified Driver View

Once all maintenance items are marked as necessary with future due dates, the driver is then eligible to be qualified. When a user clicks Save on the Maintenance Checklist and all information is entered, they will be prompted to qualify the driver. Click Yes to qualify them.

Edit DQ Maintenance List - John Doe

Employee Maintenance information was successfully stored.

The current driver now appears to meet all requirements for qualification. Would you like to make this driver qualified now?

Yes

No

When a driver is marked as qualified in the system, all of the sections above the Maintenance Checklist collapse (as shown below) which makes only the Maintenance Checklist visible. The assumption is that the other areas are complete and that the user prefers to see the important renewable items. In order to view the data in any of these closed sections, click the black double arrows on the right side of the header.

Personal Information	Edit...	⌵
Driver Qualification Information	Edit...	⌵
License Information	Edit...	⌵
Driver Equipment Information	Edit...	⌵
Prequalification Checklist	Edit Full List...	Add Attachment...
Add New...		⌵
Maintenance Checklist	Edit Full List...	Add Attachment...
	Add New...	⬆
Description	Completed	Due Date
Record of Violations (391.27)	4/4/2019	4/3/2020
		View Notes
Motor Vehicle Report	4/5/2019	4/4/2020
Annual Review (391.25)	4/4/2019	4/3/2020
Medical Exam Certificate (391.43)	4/4/2019	4/3/2021
Driver's License Expiration Date		10/10/2020
Six Month Blood Pressure Re-Certification	N/A	
One Year Blood Pressure Re-Certification	N/A	
3rd Month Blood Pressure Check	N/A	
Skill Performance Evaluation (391.49)	4/10/2019	4/9/2021
MVR Scoring	Add New...	⬆
MVR Date	Review Date	Score
		Rating

Adding an Ad Hoc Checklist Item

There may be situations where a checklist item might not apply to an entire group of employees, but instead, to an individual. The **Add New...** option is available at the top of the checklist.

To add a single checklist item for an individual employee, click **Add New...** at the top of the list.

Maintenance Checklist		
Edit Full List... Add Attachment... Add New...		
Description	Completed	Due Date
Record of Violations (391.27)	4/4/2019	4/3/2020
View Notes		
Motor Vehicle Report	4/5/2019	4/4/2020
Annual Review (391.25)	4/4/2019	4/3/2020
Medical Exam Certificate (391.43)	4/4/2019	4/3/2021
Driver's License Expiration Date		10/10/2020
Six Month Blood Pressure Re-Certification	N/A	
One Year Blood Pressure Re-Certification	N/A	
3rd Month Blood Pressure Check	N/A	
Skill Performance Evaluation (391.49)	4/10/2019	4/9/2021

The user will then be taken to the **Add Ad-Hoc Maintenance** screen.

1. **Checklist Item** - This list will contain only maintenance items that are not assigned to the employee's job class, and therefore, not already in the employee's maintenance checklist.
2. **Last Completed Date** - (format as mm/dd/yyyy or mm-dd-yyyy) This field is for the last processed date.
3. **Date Due** - (format as mm/dd/yyyy or mm-dd-yyyy) This field is for the next time the item is due. Most system administrators set this up to auto-fill this date based on how frequently this item needs to be renewed (auto-fill dates can be overwritten). If it doesn't auto-fill, enter the date the item is next due.
4. **Notes** - This field is for any quick notes that may want to be stored with a checklist item. While this text box is rather large, only the first line of the note will appear on reports, so it is suggested to make any notes as brief as possible.

Once all details are entered, click **Save**, **Save & Add New**, or **Save & Add Attachment**.

Add Ad-Hoc Employee Maintenance - Driver Name 5

1

Checklist Item:

3rd Month Blood Pressure Check

2

Last Completed("mm/dd/yyyy")

4/10/2019

3

Date Due("mm/dd/yyyy")

07/09/2019

4

Notes:

4/10/2019 (user initials): Short note here.

Save

Cancel

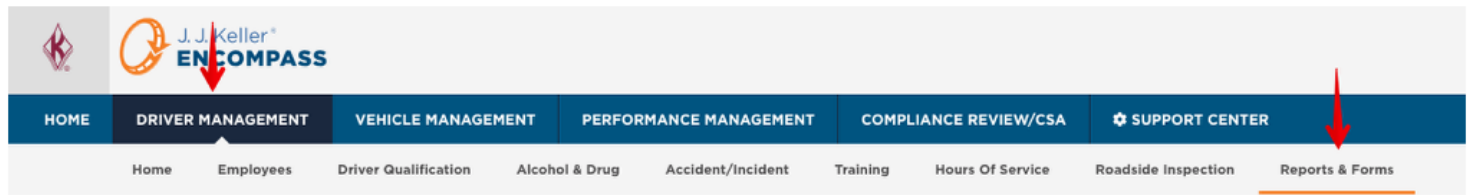
Save & Add New

Save & Add Attachment

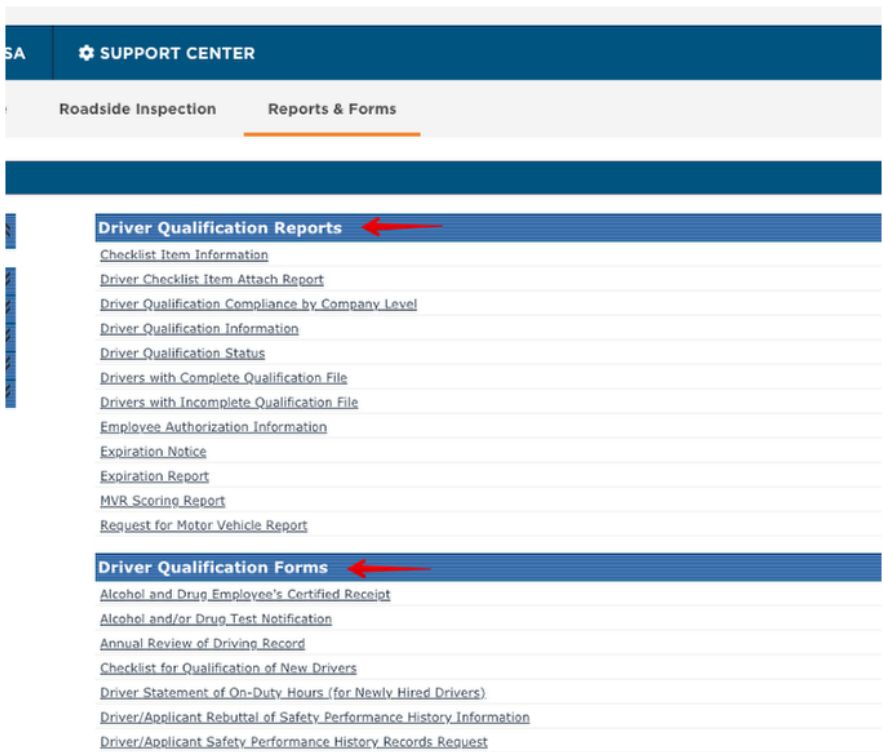
Reports & Forms

Common Reports & Forms

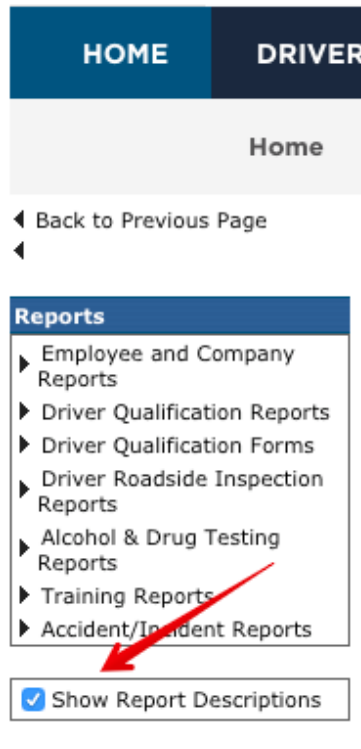
Driver Qualification reports and forms are found by clicking on Reports & Forms within Driver Management.



This area houses all reports and forms specific to driver management. The ones specific to Driver Qualification are going to be in the first two areas in the right column.



💡 Report descriptions can be enabled by clicking the checkbox on the right side of the page.



The screenshot shows a web application interface. At the top, there are two tabs: 'HOME' (active) and 'DRIVER'. Below the tabs, there is a 'Home' button. A 'Back to Previous Page' link is visible. A 'Reports' menu is open, displaying a list of report categories: Employee and Company Reports, Driver Qualification Reports, Driver Qualification Forms, Driver Roadside Inspection Reports, Alcohol & Drug Testing Reports, Training Reports, and Accident/Incident Reports. A red arrow points from the 'Accident/Incident Reports' item to a checkbox labeled 'Show Report Descriptions' at the bottom of the menu.

Most commonly used reports and forms are:

Reports

- Driver's with Incomplete Qualification File
- Employee Authorization Information
- Expiration Notice
- Request for Motor Vehicle Report

Forms

- Annual Review of Driving Record
- Motor Vehicle Driver's Certification of Compliance with Driver License Requirement
- Motor Vehicle Driver's Certification of Violations/Annual Review of Driving Record
- Safety Performance History Records Request