

LITE Client Portal Guide

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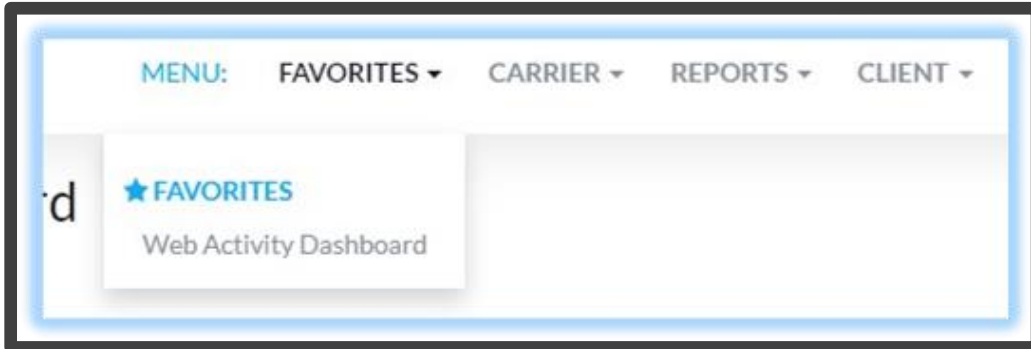
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FAVORITES

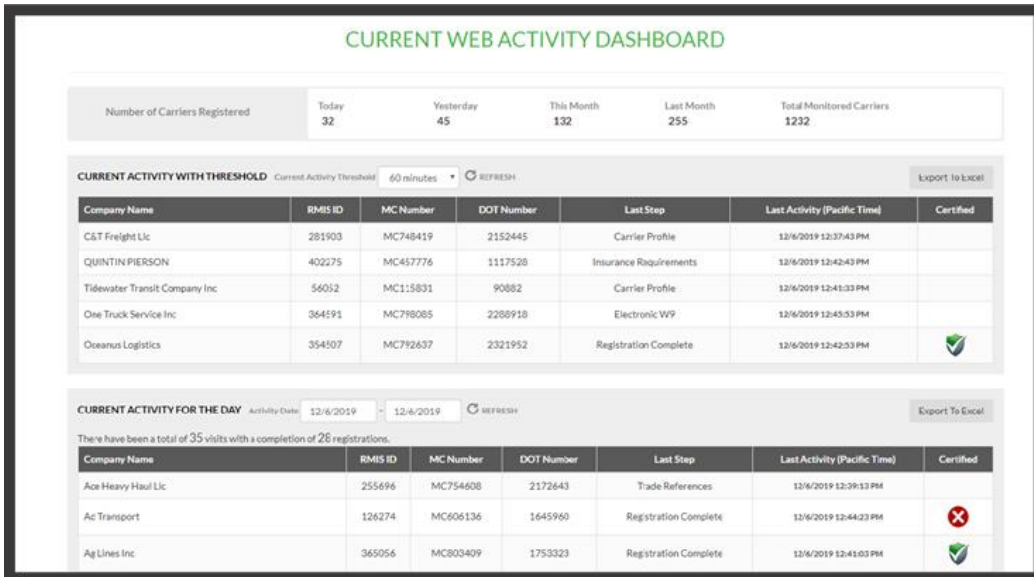
Web Activity Board

The Web Activity Board page shows all current carrier activity.

- To access the Web Activity Board, click on the **Favorites** drop-down menu and click on **Web Activity Dashboard**.



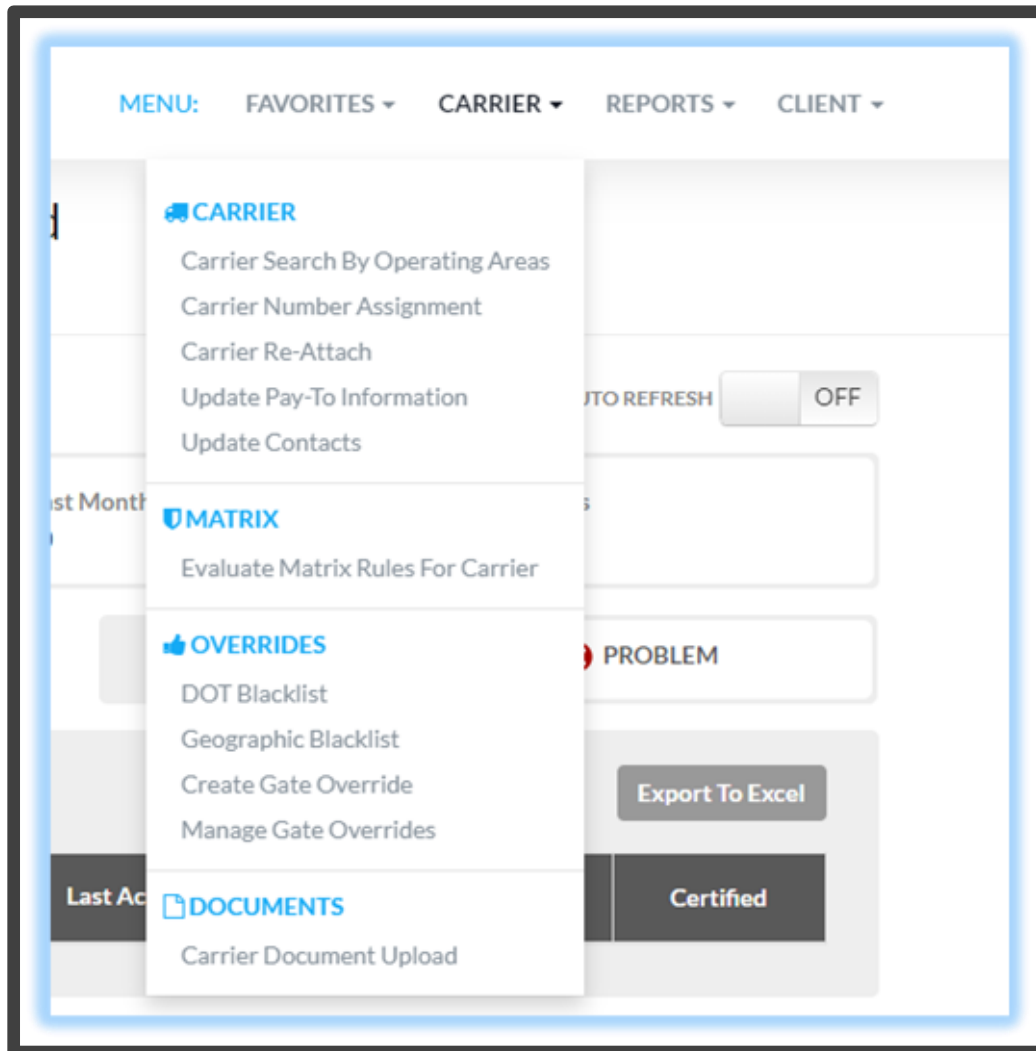
- The top graph is the **Current Activity with Threshold** table which shows activity from the last 15-60 mins, including daily activity.



- The second graph is the **Current Activity for the Day** table. This activity dashboard shows all recent carriers and their registration progress. This table is exportable.
 - The date range picker allows for showing a different day or wider range.
 - The **Last Step** column shows the last completed page by the carrier.
 - If the **Last Step** does not show **Registration Complete** the carrier has either abandoned the registration or paused.

- If the carrier does not complete within 1 hour the Registration process will have to be started over.
- The **Last Activity** column displays the last time the carrier properly completed a Registration page.
- The **Certified** column display a Green Shield if the carrier is certified and a Red X if they are not certified.
 - If the carrier is displaying as not certified, click on the Carrier's name to go to the **Carrier Status Page**. This page will include why the carrier is not certified and provide all Registration/DOT/Insurance Data.

CARRIER



CARRIER

Carrier Search by Operating Areas

This page to search for carriers that fit a specific need or location where the carrier can work.

- To access the **Carrier Search by Operating Areas**, click on the **CARRIER** drop-down menu and click on **Carrier Search by Operating Areas**.
- There are 2 modes to filter the operating areas by
 - Trucking
 - Intermodal
- Reports can be exported to Excel

CARRIER OPERATING AREAS SEARCH

Select one or more of the Operating Areas below, by clicking 'Choose'. You may filter the list by the Area or Region by entering a few letters in the 'Filter Operating Areas' box and clicking 'Filter'. Once the areas are selected, click 'Search'. The system will return any carrier that has each of those areas in their profile.

SEARCH OPTIONS

Selected Areas: Match carriers with Any areas.

Operating Area	Region	Area	Action
United States	Northeast	Maine	Remove

[Search](#)

Filter Operating Areas: Trucking [Filter](#) [Clear](#)

Operating Area	Region	Area	Action
United States	Northeast	Vermont	Choose
United States	Northeast	New Hampshire	Choose

[CLICK HERE SEARCH AGAIN](#)

Export To Excel

Result Count: 10 Page: 1 of 1 Return Count: 200

Company Name	City, State	MC #	Email
Agi	Lenoir, NC	MC900056	Rcurry@andilegroup.com
Hudson Transit Lines, Inc.	Chester, NY	MC000228	david@gormis.com
Intrastate Carrier Demo	Dreamville, IL	Tester123	Demo@gormis.com

Carrier Number Assignment

This page gives the ability to assign a number to a carrier that is specific to the client's company.

Assigning a number to a carrier helps the client keep track of the carriers attached to their website

- To access the **Carrier Number Assignment**, click on the **CARRIER** drop-down menu and click on **Carrier Number Assignment**.
- To assign a number to a carrier
 - First search for the carrier by Name, Carrier ID, RMIS ID, MC Number or DOT Number

CARRIER NUMBER ASSIGNMENT

OS:

Company Name:

Client Carrier ID:

RMIS ID:

MC Number:

DOT Number:

[Search](#)

- After the search results populate, click on the carrier
 - If the selected carrier already has a Carrier ID, that Carrier ID can be kept or a new Carrier ID can be assigned.
 - If no Carrier ID has been assigned, a new one can be assigned.

- The carrier can also be removed from the website.

1. To add a new client ID, enter the new ID in the "New Carrier ID" box below and click "Add".
2. To change an existing ID, click the ID below to select, and enter new ID in the "New Carrier ID" below and click "Update".
3. To remove a Client Carrier ID from the list please click on the "Remove" link below. NOTE: Detaching the last record will detach the carrier from the client.

Carrier Name: Mat Transport LLC

Current Carrier ID:

New Carrier ID:

Company Name	Attach Date	Client Carrier ID	
Mat Transport LLC	6/20/2019 12:00:00 AM		<input type="button" value="Remove"/>

Carrier Re-Attach

A previously active carrier can detach, the client has the option to re-attach the carrier without having the carrier go through registration again.

- To access the **Carrier Re-Attach**, click on the **CARRIER** drop-down menu and click on **Carrier Re-Attach**.
- Then search for the carrier by RMIS ID, MC Number, DOT Number or Client Carrier ID.
- From there the carrier can be **Re-Attached**.

Carrier Re-attach

WOULD LIKE TO RE-ATTACH BELOW.

RMIS Carrier ID:

MC Number:

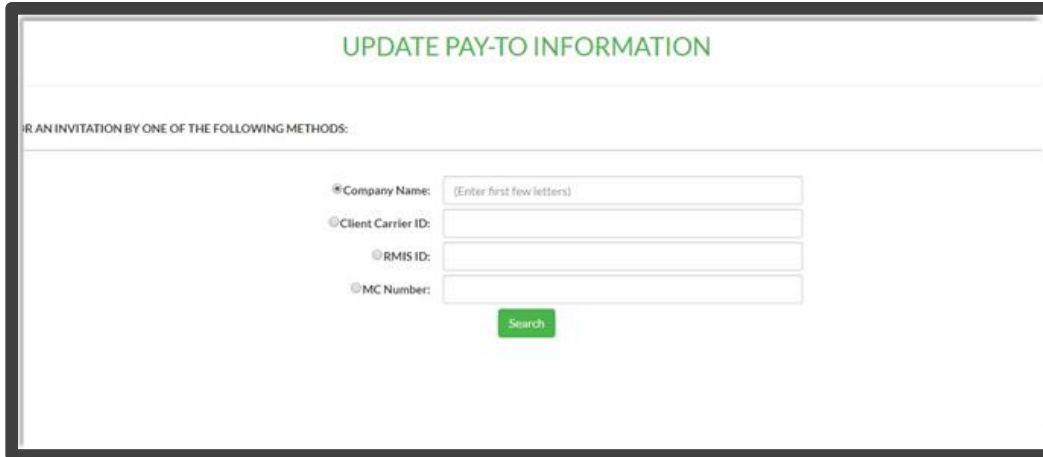
DOT Number:

Client Carrier ID:

Update Pay-To Information

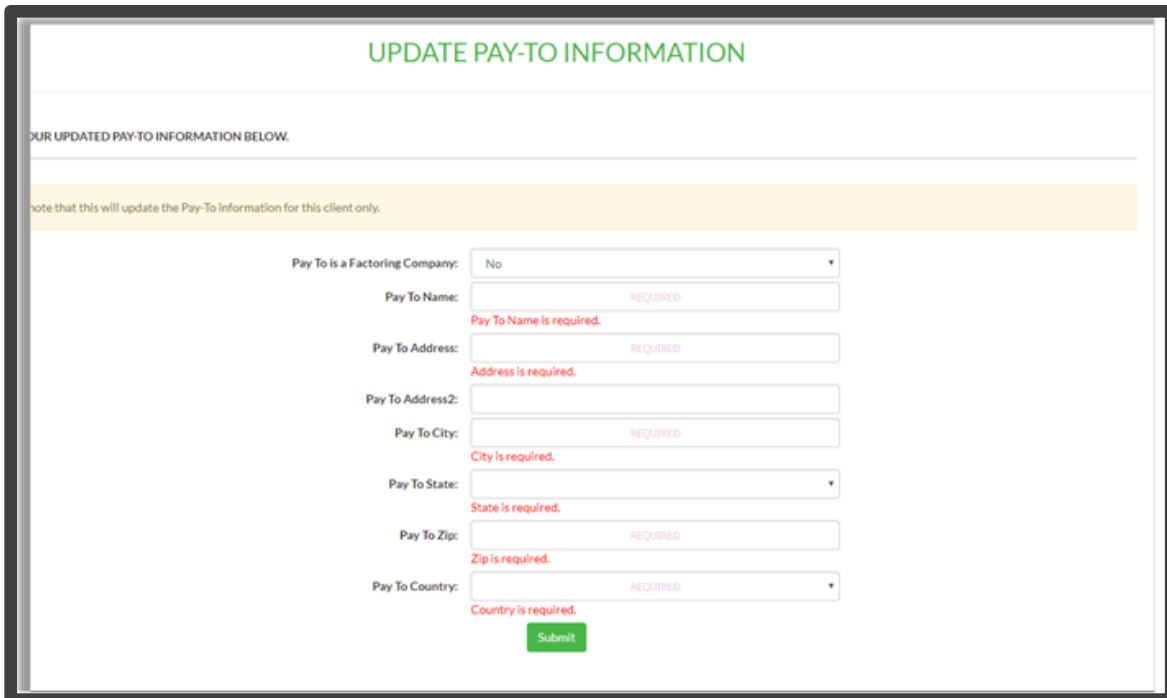
This page allows the client to update a carrier's payment information if there was a change after initial registration. **Note:** This triggers an updated data push, this will not trigger an email alert to carriers.

- To access the **Update Pay-To Information**, click on the **CARRIER** drop-down menu and click on **Update Pay-To Information**.
- Then search for the carrier by Client Carrier ID , Company Name, RMIS ID or MC Number.



The screenshot shows a web form titled "UPDATE PAY-TO INFORMATION" in green text. Below the title, it says "SEARCH FOR AN INVITATION BY ONE OF THE FOLLOWING METHODS:". There are four radio button options: "Company Name:" (with a subtext "(Enter first few letters)"), "Client Carrier ID:", "RMIS ID:", and "MC Number:". Each option has a corresponding text input field. A green "Search" button is located below the input fields.

- Next, update the carrier's pay information:
 - Select whether a carrier is using a Factoring Company.
 - Next add the **Pay-To** Name, Address, City, State, Zip and Country.



The screenshot shows the "UPDATE PAY-TO INFORMATION" form with a yellow banner that reads "Note that this will update the Pay-To information for this client only." Below the banner, there is a dropdown menu for "Pay To is a Factoring Company:" with "No" selected. The form contains several required fields, each with a red error message: "Pay To Name:" (REQUIRED, "Pay To Name is required."), "Pay To Address:" (REQUIRED, "Address is required."), "Pay To Address2:" (REQUIRED), "Pay To City:" (REQUIRED, "City is required."), "Pay To State:" (REQUIRED, "State is required."), "Pay To Zip:" (REQUIRED, "Zip is required."), and "Pay To Country:" (REQUIRED, "Country is required."). A green "Submit" button is at the bottom.

Update Contacts

This page allows the client to update a **Carrier's Contacts** information on their behalf. **Note:** This triggers an email alert to carriers as it would during registration.

- To access the **Update Contacts**, click on the **CARRIER** drop-down menu and click on **Update Contacts**.
- Then search for the carrier by Company Name or MC Number.
- Next, update the contact information required.

Update Carrier Contacts

Please search and update the carrier's contacts info below.

Company Name:

MC Number:

our search again.

City, State	MC#
-------------	-----

MATRIX

Evaluate Matrix Rules For Carrier

This page allows the client to force the system to recalculate the certification status for a specific carrier. This can be utilized in the event an update was recently made and the client would like to speed up the carrier certification status re-evaluation.

- To access the **Evaluate Matrix Rules For Carrier**, click on the **MATRIX** drop-down menu and click on **Evaluate Matrix Rules For Carrier**.
- Then search for the carrier by RMIS Carrier ID or MC Number.
- Next, select the **Evaluate Rules** button.
 - This action can also be completed on the **Carrier Status** page by clicking the **Evaluate Matrix Rules for Carrier** button.

OVERRIDES

DOT Blacklist

This page allows the client to prevent specific carriers from registering on their website. **Note:** This action can only be completed by an the Admin Role.

- To access the **DOT Blacklist**, click on the **OVERRIDES** drop-down menu and click on **DOT Blacklist**.
- DOT Blacklist is specific to MC/DOT/Intra-State Carrier Number/State. Enter in one of the requirements and click Add **DOT Gate Block**.
 - The is a PERMANENT Gate Block.

DOT BLACKLIST

DOT NUMBER OR INTRASTATE NUMBER TO ADD A DOT GATE BLOCK.

[Export To Excel](#)

US Docket# (MC, FF, MX):

US DOT Number:

Intra-State Carrier:

Note:

[Add DOT Gate Block](#)

- A full report can be viewed and exported to Excel.

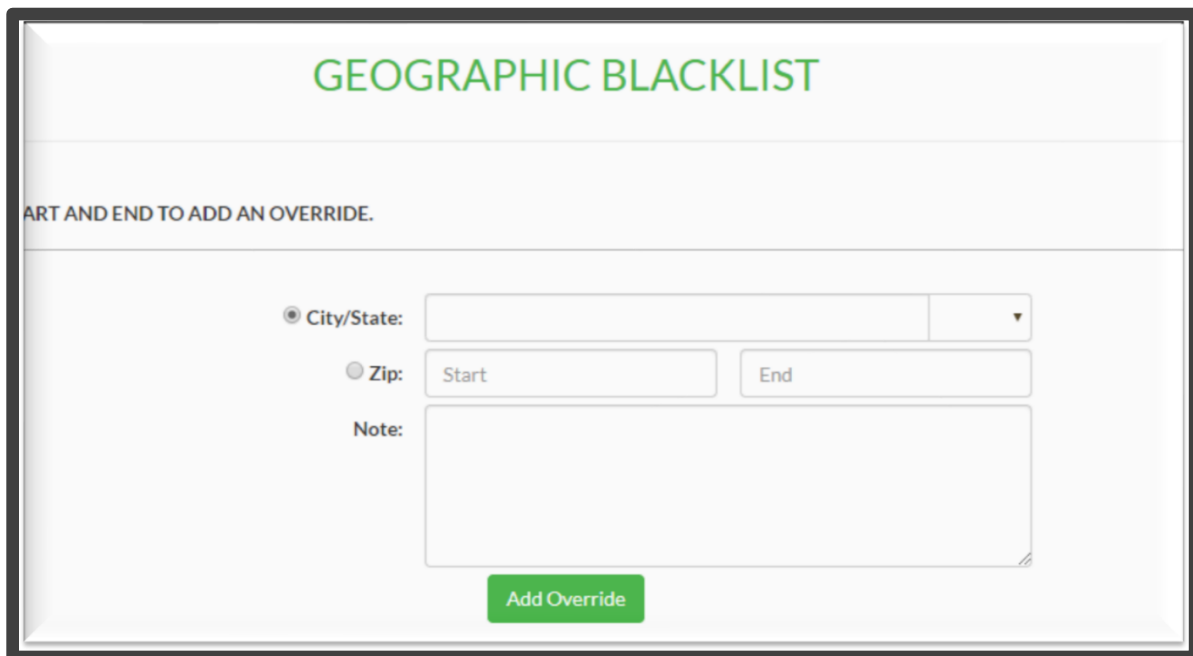
Block Type	Value	Note	Create User	Create Date	
MCNumber	MC305747	09192017: Per Will, Owner verified Identity. https://app.asana.com/0/115147786469754/433407143848542. Fraud Detected, Max Trans Fraud, RMIS Fraud Alert spawned the block	Global Blocklist	9/13/2017	Remove
MCNumber	MC999988		tony@gormis.com	11/5/2015	Remove
MCNumber	MC999989		tony@gormis.com	11/5/2015	Remove
MCNumber	MC999987		tony@gormis.com	11/5/2015	Remove
MCNumber	MC941946	Global Blocklist	medina@gormis.com	12/10/2019	
MCNumber	MC629354	Global Blocklist	medina@gormis.com	11/27/2019	
MCNumber	629354	Global Blocklist	juan@gormis.com	11/27/2019	
MCNumber	MC143059	Global Blocklist	medina@gormis.com	11/25/2019	
MCNumber	MC978063	Global Blocklist	medina@gormis.com	11/25/2019	
MCNumber	MC1049895	Global Blocklist	juan@gormis.com	11/22/2019	
MCNumber	MC137839	Global Blocklist	medina@gormis.com	11/7/2019	
MCNumber	MC1022195	Global Blocklist	medina@gormis.com	11/7/2019	

Geographic Blacklist

This page allows the client to prevent carriers from specific areas from registering on their website.

Note: This action can only be completed by an Admin Role.

- To access the **DOT Blacklist**, click on the **OVERRIDES** drop-down menu and click on **Geographic Blacklist**.
- The client has the option to select a City/State combination or a Zip range to add to the Blacklist.
 - This will be based on the carriers Domiciled Addressed as per FMCSA.
- Then click **Add Override**.



The screenshot shows a web form titled "GEOGRAPHIC BLACKLIST" in green text. Below the title, there is a section labeled "PART AND END TO ADD AN OVERRIDE." The form contains three main input areas: a radio button labeled "City/State:" next to a text input field and a dropdown arrow; a radio button labeled "Zip:" next to two text input fields labeled "Start" and "End"; and a text area labeled "Note:". At the bottom center of the form is a green button labeled "Add Override".

Create Gate Override

This page allows the client to override the gate rule and continue with their registration if they were not able to pass the gate.

- To access the **Create Gate Override**, click on the **OVERRIDES** drop-down menu and click on **Create Gate Override**.
- Select the **Override Type**, each type selected will bypass that specific gate test.
 - Selecting **DOT Gate Not Required** bypasses all tests at once.
 - Review the **Gate & Rule Override FAQ** to understand all override types.
- Enter in all other required information and click the **Submit** button.

CREATE GATE OVERRIDE

To create a override please enter at least one of the carrier identifiers along with an expiration date.

Override Type:

US Docket# (MC, FF, MX):

US DOT Number:

Intra-State Carrier:

Expiration Date: REQUIRED

Note:

[Submit](#)

Manage Gate Override

This page allows the client to search the Gate Overrides that have been created for an attached carrier.

- To access the **Manage Gate Override**, click on the **OVERRIDES** drop-down menu and click on **Manage Gate Override**.
- Then search for the override by MC Number, Override Type, Intra-State Carrier, DOT Number, Expiration Date and/or Create Date. Click **Search Overrides**.

MANAGE GATE OVERRIDES

SEARCHING METHODS:

MC Number:

Override Type:

Intra-State Carrier:

DOT Number:

Expiration Date: From To

Create Date: From To

[Search Overrides](#)

- A list of overrides that meet the criteria will populate.
- The client can review the gate override and make adjustments as needed.

DOT LegalName	MC Number	DOT Number	Intrastate Number	Create User	Create Date	Expire Date	Override Type	Note
	MC888888			bill@gormis.com	4/25/2019	5/27/2019	Safety Rating Check Not Required	bill in a pinch Delete
RMIS TEST (Trans Test) - Authority	MC999992			david@gormis.com	6/17/2019	7/17/2019	DOT Block Check Not Required	test Delete

DOCUMENTS

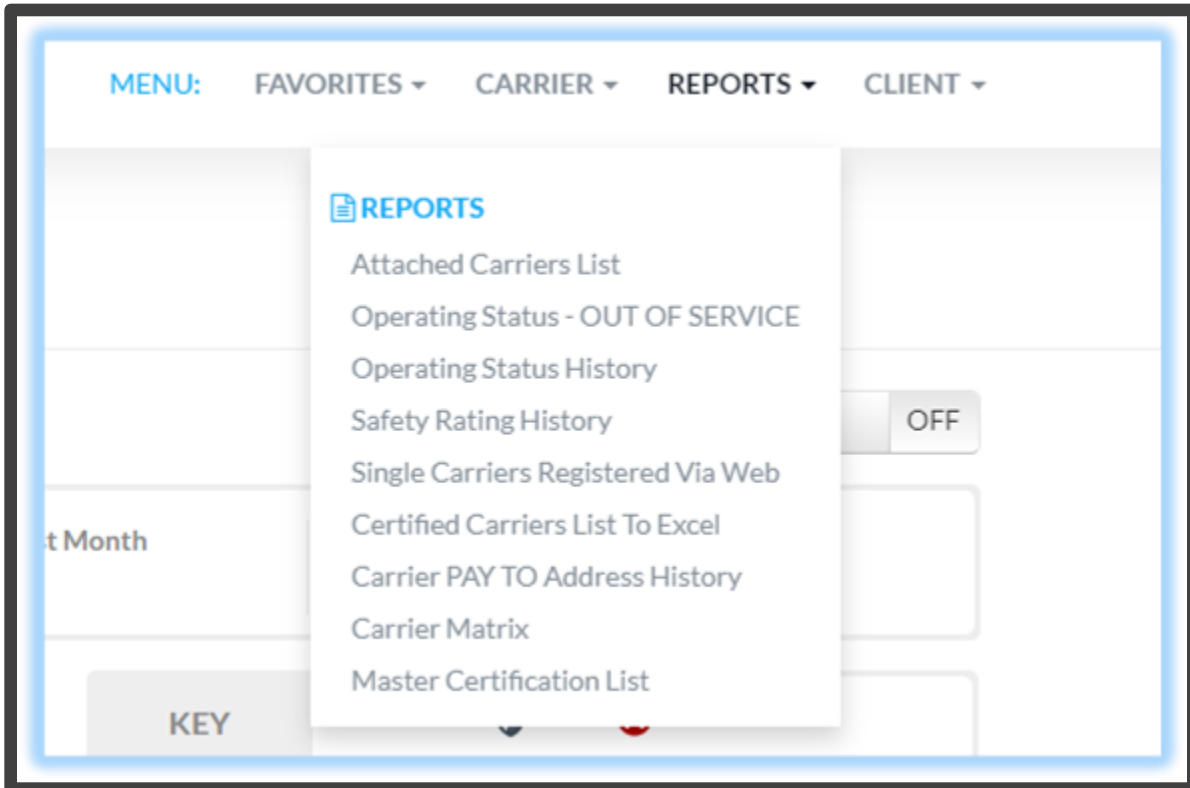
Carrier Document Upload

This page allows the client to update documents on the carrier's behalf.

- To access the **Carrier Document Upload**, click on the **DOCUMENT** drop-down menu and click on **Carrier Document Upload**.
- Then search for the carrier by Company Name, MC Number or RMIS ID. Click **Search**.

- Select the Document Type to be uploaded and upload the document.

REPORTS



Attached Carriers List

This page shows all the carriers that are attached to the client's website. **Note:** The maximum return for the report is 1,000.

- To access the **Attached Carriers List**, click on the **REPORTS** drop-down menu and click on **Attached Carriers List**.

RMIS ID	Company Name	City	State	Zip	MC Number	DOT Number	Authority	Contact Info
1610641	4 us corp	LAKE ZURICH	IL	60047	60090	0	Common: Contract: Broker:	Contact: Iliia Malikovskiy Phone: 773-253-5331 Fax: Email: 4usilcorp@gmail.com

- The date range filter allows the client to narrow the list of carriers who were attached during the period selected.

ATTACHED CARRIERS LIST

PLEASE SEARCH FOR THE CARRIERS WITH IN THE ATTACHED DATE RANGE. (MAXIMUM RETURN CARRIER COUNT IS 1000.)

Date Range:

Operating Status – OUT OF SERVICE

This page outlines the list of carriers that are not operational.

- To access the **Operating Status**, click on the **REPORTS** drop-down menu and click on **Operating Status – OUT OF SERVICE**.
- Choose to search the carriers that are by **OUT-OF-SERVICE, NOT AUTHORIZED OR ALL NOT ACTIVE OR NOT AUTHORIZED**.
- The client also has the ability to search by **Company Name**.

OPERATING STATUS - OUT OF SERVICE

This report shows any carrier with an MC# attached to your account that does NOT have a DOT Operating Status of "ACTIVE OR AUTHORIZED".

SEARCH OPTIONS

OUT-OF-SERVICE
 NOT AUTHORIZED
 OR
 ALL NOT ACTIVE OR NOT AUTHORIZED

Page: 1 of 1
 Go to page:
 Company Name:

Total Carriers: 27

Insured Count: 27

RMIS ID	Company Name	MCNumber	USDOTNumber	Operating Status	Status Date	Clients Carrier ID	Attached Date
1315129	305 National Star Inc	Miami, FL 33177	MC058307	3066346	OUT-OF-SERVICE	10/12/2019	2/12/2018 3:24:21 PM
1787713	3Way Logistics Lic	Hilliard, OH 43026	MC988842	2874673	OUT-OF-SERVICE	11/29/2019	6/20/2019 3:27:39 PM
1635328	A&E Transportation LLC	Lakewood, CO 80214	MC1005100	3215372	OUT-OF-SERVICE	8/19/2019	6/20/2019 12:00:00 AM

Operating Status History

This page will show the client a list of carriers that outlines the carriers current operating status and previous status.

- To access **Operating Status History**, click on the **REPORTS** drop-down menu and click **Operating Status History**.
- The client can search by **Date Range** or by **MC Number**.

OPERATING STATUS HISTORY

SEARCH OPTIONS

By Date Range:

By MCNumber:

- Click **Search**.

Carrier Name	MC Number	US DOTNumber	Prior Status	Current Status	Check Date
American Eagle Towing Inc	MC1030202	3265776	AUTHORIZED FOR Property	NOT AUTHORIZED	12/18/2019
Centrolink Transport Inc	MC004826	2745902	AUTHORIZED FOR Property	NOT AUTHORIZED	12/17/2019

Safety Rating History

This page pull data from SAFER to display a safety rating history.

- To access the **Safety Rating History**, click on the **REPORTS** drop-down menu and click on **Safety Rating History**.

- The client can search by **Date Range** to pull every carrier that had a recognized rating change within the date range.
- Or the client can search by **MC Number** which will recognize all changes for that specific carrier.

- Click **Search** to view the results.

Single Carriers Registered Via Web

This page to search for carriers that registered for your website via the web.

- To access the **Single Carriers Registered Via Web**, click on the **REPORTS** drop-down menu and click on **Single Carriers Registered Via Web**.
- Then search for the carrier by Company Name, RMIS ID Carrier ID or MC Number. Click **Search Carriers**.

- The carrier(s) will display in the results, click on the **carrier** name to view the carrier details.

Company	City, State	MC#
Traffix	Milton, ON	MC211991

Certified Carriers List to Excel

This page will automatically download the full attached carriers list to excel.

- To access the **Certified Carriers List to Excel**, click on the **REPORTS** drop-down menu and click on **Certified Carriers List to Excel**.

- This report includes the carrier's Name, Phone, EIN/SSN, MC, DOT, Attached ID, TSA, SCAC, Common and Contract Authority and Certification.

Sample Life											
Certified Carriers List - Sample Life											
Prepared on 2/18/2020 by Registry Monitoring Insurance Services, Inc.											
InsdID	DBA Name	Company Name	Phone	EIN	SSN MC Number	US DOT Number	Attached ID	TSA Menards	SCAC Common Authority	Contract Authority	Certified
2024844	Rmis Test (Trans Test) - Pass	Rmis Test (Trans Test) - Pass	7777777777	00-0300000	MC9979682	9979682			A	A	False

Carrier PAY-TO Address History

This page allows the client to view the Pay-To history.

- To access the **Carrier Pay-To Address History**, click on the **REPORTS** drop-down menu and click on **Carrier Pay-To Address History**.

Carrier Matrix

This page will allow the client to view attached carrier's certification status and includes what information is deficient in the even the carrier is not certified. **Note:** These certification requirements are based on the client's business rule structure.

- To access the **Carrier Matrix**, click on the **REPORTS** drop-down menu and click on **Carrier Matrix**.
- A full list can be viewed or can be narrowed down by entering in the search criteria and clicking the **Search** button.

The screenshot shows the 'CARRIER MATRIX' interface. At the top, it displays 'Name: Sample Transportation' and 'ID: 15847'. Below this, there are search filters and a 'Search' button. A key at the top right explains the status icons: OK (green check), PROBLEM (red X), WAIVER (yellow check), NOT REQD (yellow check), WARNING (red exclamation), and DATA FOUND (blue document). The main table has columns for Intra, Auto, Cargo, GL OnFile, WC OnFile, Op Status, DOT Auth, DOT Auth Time, DOT Safety, CAP Required, CAP Approval, W9, Agreement, Expiring, SB1402, and Certified. Each cell contains a status icon.

- A **Key** to clarify all symbols can be viewed at the top of the page.
 - The **Waiver** symbol shows if there has been a gate or rule override.
 - The **Warning** symbol shows if a carrier's insurance is expiring soon.

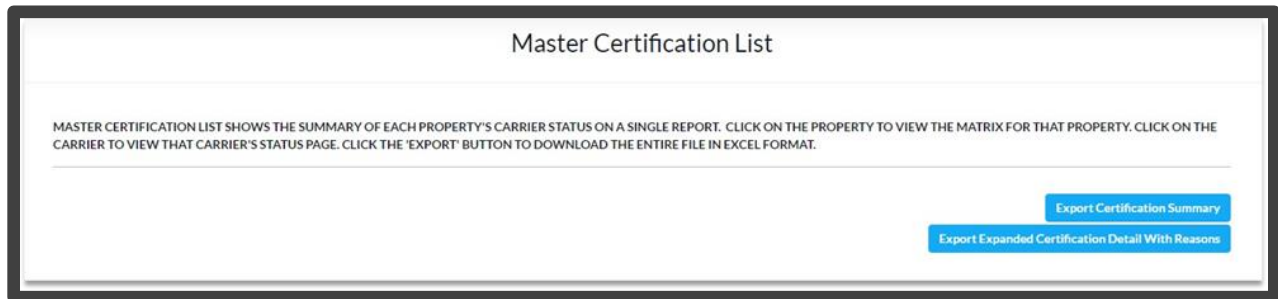
This close-up shows the 'KEY' section with the following symbols: OK (green check), PROBLEM (red X), WAIVER (yellow check), NOT REQD (yellow check), WARNING (red exclamation), and DATA FOUND (blue document). Below the key is a search bar with a 'Search' button and a 'Go to Page' dropdown set to '1' of '49' pages.

Intra	Auto	Cargo	GL OnFile	WC OnFile	Op Status	DOT Auth	DOT Auth Time	DOT Safety	CAP Required	CAP Approval	W9	Agreement	Expiring	SB1402	Certified
	⊗	⊗			⊗	⊗	⊗	✓	No	⚠	✓	✓		✓	⊗

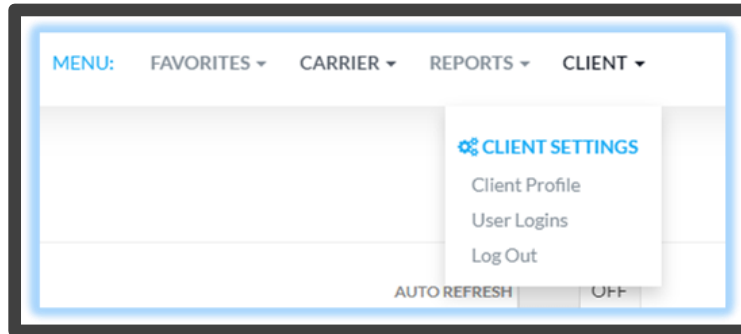
Master Certification List

If the client has multiple business rules designations, this page allows the client to see the carriers and which entities they are certified for.

- To access the **Master Certification List**, click on the **REPORTS** drop-down menu and click on **Master Certification Lists**.
- The client can export basic carrier details by clicking the **Export Certification Summary** button.
- The client can export expanded certification details with reasons, including the basic carrier details plus the non-certification reason, by clicking the **Export Expanded Certification Detail With Reasons** button.



CLIENT



Client Profile

This page is an outline of the Client's password settings and requirements. The client can see the information, but to make any changes they must contact RMIS.

- To access the **Client Profile**, click on the **CLIENT** drop-down menu and click on **Client Profile**.

A screenshot of the 'CLIENT PROFILE' page. The title 'CLIENT PROFILE' is at the top in green. Below it is a section titled 'User Login Password Rules'. This section contains several input fields for password requirements: 'Password Expiration Days' (10000), 'Password Minimum Length' (8), 'Password Minimum Upper Case' (0), 'Password Minimum Lower Case' (1), 'Password Minimum Digits' (1), 'Password Minimum Special Characters' (1), and 'Password Minimum Before Repeating' (2). Below these fields is a 'Password Instructions' section with a sample password rule: 'Sample Client passwords must have a minimum of 8 characters, have 1 lower case character, 1 digit, and one special character. Passwords will expire after 180 days.'

User Logins

This page shows the client all the users that are able to log into the website's client portal.

- To access the **User Logins**, click on the **CLIENT** drop-down menu and click on **User Logins**.
 - The client can view the User History, Send a Password Update or Enter the User.
 - The **Role** column allows the client to determine which users have the Admin, Standard or Accounting role.

A screenshot of the 'User Logins' page showing a table of users. The table has columns for 'Full Name', 'Username', 'Role', 'Locked', 'Active', and 'Password Age (Days)'. There are two rows of data. The first row is for 'Pete L' with username 'pete@gormis.com', role 'Admin', locked status 'No', active status 'Yes', and password age '1565'. The second row is for 'RMIS Testing' with username 'it@gormis.com', role 'Admin', locked status 'No', active status 'Yes', and password age '1565'. To the right of each row are three green buttons: 'User History', 'Send Password Update', and 'Edit User'.

- To create a new user select the **Create New User** button.

A screenshot of the 'USER LOGINS' page. The title 'USER LOGINS' is at the top in green. In the top right corner, there is a green 'Create New User' button with a blue arrow pointing to it. Below the title is a 'SEARCH OPTIONS' section with several input fields: 'Full Name' (placeholder: 'Enter first few letters'), 'User Name' (placeholder: 'Enter first few letters'), 'Role' (dropdown menu), 'Locked' (dropdown menu), and 'Active' (dropdown menu with 'Yes' selected). At the bottom right of the search options are two green buttons: 'Cancel' and 'Search Users'.

