To follow are instructions on how to use the IANA Information Services Web Portal to access insurance information on behalf of TRAC Motor Carriers.

➢ **Account Information**

The account information screen is where the user can update their address and contact information as well as change their password. The user may also establish a separate contact for billing purposes. Company Name and SCAC Code changes will require that you contact IANA directly.

➢ **Current Template Details**

The Current Template Details shows the user a snapshot of their insurance requirements. Each time insurance information is received for a Motor Carrier, the information is bounced up against the user's template to determine if the Motor Carrier meets the user's requirements.
➢ **EP Template**
Each time a user changes its requirement, a new template is created. This page allows the user to look at past, current or future versions of its requirement templates. User will simply selection from the Search Templates dropdown menu which option they are searching for.

➢ **MC Lookup**
This is where the user will go to lookup a Motor Carrier’s account. Users may search by Company Name, SCAC Code or Internal Known As Code (if applicable). Once search parameter is entered, click on SEARCH to go to the MC Detailed Page.

If searching by name, multiple entities may be returned dependent upon the search criteria entered. From this summary screen the user can see under the MC EP STATUS column whether the Motor Carrier is approved or not. There are also fields to show whether an override has been used on the account, the MC is flagged as a member carrier for the user and if there is an internal KnownAs Code assigned to the MC.

By clicking on the MC Company Name, it will take the user to the Detailed screen regarding the MC. See information on the follow page on what is accessible from this screen:
1 – **MC Contact Details** – address, phone, fax and e-mail (primary & secondary)
2 – **Link to click on US DOT Number** that links to FMCSA’s safer website
3 – **Link to additional contacts** for the Motor Carrier, if provided
4 – **UIIA Status for the Motor Carrier** – possible statuses
   - Active – MC is active in the UIIA
   - Cancelled – MC is participant in the UIIA but currently in a cancelled status
   - Deleted – MC was formerly a UIIA participant but no longer is as they are currently deleted
   - Non-UIIA – MC has never been a participant in the UIIA
5 – **MC Status** – This field identifies if the Motor Carrier is valid for User. If not valid, User may click on the link to see what information is needed for the MC to become approved. The missing information will be shaded in pink unless the User has cancelled the MC for non-payment. If cancellation for non-payment it will indicate this at the top of the box.
6 – **Links to Demographic and Company Profile Information.** These links will display this information if it has been provided by the MC. Please note that this data is strictly as information since is MC furnished and no validation is done on this data.
7 – **The MC Insurance Details** – shows all the insurance that has been submitted on behalf of the MC to IANA. You can click on the Policy Code to see further details on the policy. This includes:
   - Policy Code (Type)
   - Policy Status
   - Policy Type (Primary or Excess)
   - Limit/Deductible
   - Effective Date/Expiration Date
   - Policy Number
   - Insurance Company
   - Best Rating (if available)
   - Insurance Agent

Note: That IANA expires policies at 12:01 a.m. on the date of expiration so agents are advised that insurance renewals need to be provided the day before policy expiration occurs.
8 – EP/MC Specific Details – This section contains the following information:

➢ **Known As Code** (If applicable)
➢ **EP Member** – this flag will be set to YES if it is a carrier for the User.
➢ **House Trucker** – optional field that can be used by the User to identify House Carriers
➢ **EP Private** – Only applicable to railroads
➢ **Cancel MC** – Should user wish to cancel the Motor Carrier for some reason, they would check this box, enter a Reason for the cancellation in the Remark field and click on SAVE. The Remark should also include if there is a specific contact the User wants the MC to contact regarding the cancellation, otherwise the main contact will be provided.
➢ **Override Use flag** – this field identifies whether the account has a waiver for a requirement on file. If waiver is on file, this field will be set to Y.

9 - **WAIVE/CHANGE REQUIREMENTS** – User will hit this button should they want to waive an insurance requirement for a specific MC. Once you click on the WAIVE/CHANGE REQUIREMENTS button, you will be taken to the WAIVER screen below:

<table>
<thead>
<tr>
<th>Policy</th>
<th>Grant Waiver</th>
<th>New Limit</th>
<th>New Deductible</th>
<th>Additional Insured Required</th>
<th>Self Insured Overdue</th>
<th>No REST Rating</th>
<th>RRC Override</th>
</tr>
</thead>
<tbody>
<tr>
<td>AL</td>
<td>No</td>
<td>1,000,000</td>
<td>0</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
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<td>GL</td>
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<td>10,000</td>
<td>0</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
</tbody>
</table>

To waive a requirement, the User will set the GRANT WAIVER Flag for the specific coverage to YES.

If the User wants to waive the limit on the policy they will get the New Limit field and enter a -1 (negative 1).

This will tell the system to ignore this policy when calculating the MC’s status for the User.

If the User wants to waive Additional Insured, Self Insured, or RRG, the user would set the GRANT WAIVER flag to Yes and then set the appropriate flag on the drop down menu for the item.

Then click on SAVE.

➢ **Re-Calculate MC/EP Valid Status**

This screen allows the user to see how many valid motor carriers they would have if they were to change their requirements (i.e. limits, additional insured, etc.). No change occurs it is simply provided as an information only screen for the user. All submissions for changing requirements would need to be submitted to Debbie Sasko via e-mail at debbie.sasko@intermodal.org.

➢ **Manage Secondary Users**

The Main User on the account can create as many secondary users that it would like to have available for the account. Each Main User is responsible for managing the access to their account through IANA.

Secondary Users will log in at: [https://www.uiia.org/equipment-providers-secondary-users-login](https://www.uiia.org/equipment-providers-secondary-users-login)

Secondary users will login with SCAC, User Name and Password.
Web Report Generator

The Web Report Generator will allow the User to pull customized reports. These reports can also be scheduled to run at a specific time on various intervals.

To follow are the options available for reports:

- **Your Field Picks** – This allows the user to select the fields it wishes to receive on the report. A pop-up box will appear once the User selects this option. There are three sets of data fields available – a) General Information (always select EP/MC Approved Y/N field), b) Policy Details (Insurance information) and c) Company Profile information (will be generated on report if provided by the MC)

Once fields are select click on OK.
Scroll down and select

**File Type** – available formats are Excel or TXT

**Sort Order** – select Company Name, SCAC, Zip Code or Known As Code

**MC Filter** – Select

a) **All Member Carriers** – includes all MCs flagged for the User regardless of whether approved or not.

b) **Not Approved Member Carriers** – only companies that are flagged for the User but are not currently approved.

c) **Approved Member Carriers** – only companies that are flagged for the User and approved.

Enter any other parameters you wish to include on the report on and then Scroll to the bottom of the screen and click on **GENERATE REPORT NOW**.

➢ The User may also elect to run a canned report – Options are under Basic Properties
  - Company Contact Info and UIIA Status/TRAC Status
  - Company Contact Info, Primary Insurance dates & UIIA Status/TRAC Status
  - Company Contact Info, All Insurance Expiration Dates & UIIA Status/TRAC Status

➢ There are also other parameters that can be selected:
  - MC Record Updated – Last date the MC’s account was updated.
  - MC Status Changed – Last date the MC’s status changed (i.e. Approve/Not Approved or Not Approved to Approve)
  - Policy Expiration Date
  - MC Will Become Not Approved

➢ **Limits**
  - User can search for companies that have specific limits on a specific type of policy.

➢ **Company Profile Info and Equipment Type** – This information can be pulled into a report but is based on information provided by the MC.

**To Schedule Reports**

➢ Once parameters are entered scroll down and click on **SCHEDULE REPORT**.
➢ A pop-box will appear where you will set the frequency of the report and indicate the emails the report should be sent to.
➢ Once finished, click on **SCHEDULE REPORT**.
➢ **Lookup Archival & History**

This is where the User will go to look for information for a past timeframe. For instance, if looking for insurance that was in place for a MC for specific date/time. User would enter Company Name or SCAC Code (better to use SCAC) and then the date of the incident. Then click on SEARCH.

When results are returned click on the Company Name to obtain the status and the insurance for the specific date provided: (Note: Status shown on this screen is the company’s current status in our system. Need to click on company name to find status on date of request)

Detailed results are returned below. This shows the information that was in place on the date and allows the User to print the insurance in place by clicking on the PRINT IN PLACE POLICIES. If there are SCANNED DOCUMENTS available they will be accessible as well by clicking on the ACCESS SCANNED DOCUMENTS button.

➢ **Daily MC Operating Status Report**

IANA does a sweep against FMCSA’s SAFER website each morning. Any MC that has a DOT or MC NOT AUTHORIZED OR OUT OF SERVICE, will receive a warning letter from our office stating that if this is not addressed within 24 hours their account will be cancelled. If the account is actually cancelled the next day, the Motor Carrier would received notice of the cancellation.

Users will have access to the results of the daily reports which contains any updates (i.e. new information from the previous run on companies with DOT/MC Numbers out of service and also reinstatements). These are available in Excel format.

➢ **Add Other Contacts**

User will have the ability to add additional contacts that MC’s will have the ability to see when logged into their account with IANA (i.e. specific contacts for detention issues, lost/stolen, outstanding interchanged info)
Notification of Outstanding Interchanged Equipment

Users can upload an Excel file using the specified template available in the application that identifies interchanged equipment that has not been returned by a specific Motor Carrier company. The naming convention of the file would be the date file is uploaded followed by the MC SCAC (i.e. 01012017ABCD.xls). Alternatively, User may upload a single Excel file that contains information for multiple companies as long as all outstanding equipment is listed for each Motor Carrier together in the file and the first column in the Excel file is the SCAC Code for the Motor Carrier.

On a daily basis a batch job will take the Excel files received and send notification via e-mail to the main Motor Carrier contact or a contact designated by the Motor Carrier to receive these types of notifications. The e-mail will include an Excel file of the outstanding equipment as an attachment.

Each Excel file uploaded would need to include at least the following information in order to furnish the Motor Carrier with the necessary information needed for research purposes:

- Equipment Alpha/Numeric ID
- Outgate Date
- Location/Facility
- Booking/BL
- Number of Days Equipment has been out
- IEP Contact (should include the person, email and/or phone number that MCs may call regarding questions on the outstanding interchanged equipment).

Please see screen shots below on how to use the new feature:

1. Click on new link – MC Notification of Outstanding Interchanged Equipment

2. Download the appropriate Excel template depending if the file you will be uploading contains multiple motor carriers or is specific a single motor carrier. Once Excel Template is prepared, you will select the appropriate option based on if the file is for multiple MCs or the file is only for one MC. Please make sure if the file is for only one MC that the file name is that day’s date followed by the MC SCAC.
3. Click on UPLOAD to submit the Excel file.

4. Click on CHOOSE FILE to upload the Excel file. If uploading files for a single Motor Carrier SCAC in separate files, you will have the ability to upload five files at a time. If you want to add more than one file, click on ADD MORE FILES.

   ![Choose File](image1.png)

   **Click on CHOOSE FILE to upload Excel file.**

   ![Add More Files](image2.png)

   **To upload more than one file for different motor carriers, click on ADD MORE FILES.**

5. Below screenshot shows an example if more than one Excel file is uploaded for multiple Motor Carriers. Once ready to submit the file click on UPLOAD.

   ![Multiple Files](image3.png)

6. When files are uploaded successfully you will see a message at the top of the screen that states: **Files uploaded successfully and notification will be sent to MC soon.**

   ![Success Message](image4.png)
7. An IEP may review files it has uploaded by clicking on the **VIEW UPLOADED FILES HISTORY**

See below for **VIEW UPLOADED FILES HISTORY** screen. The Notification Sent Status will show a check mark if the notice has been sent to the MC.

![VIEW UPLOADED FILES HISTORY](image)

**Non-UIIA Motor Carriers**

When a Non-UIIA Motor Carrier registers, TRAC will receive email alerting them that the company has registered in IANA’s system. Before the Non-UIIA Motor Carrier can become approved, TRAC will need to flag the company as a **MEMBER**. Below are steps to follow to flag a company as a **MEMBER**:

- Go under the **MC Lookup** and search for the company
- Go to the **MC Details** by clicking on the **MC company name**
- Scroll down to the **EP/MC SPECIFIC DETAILS** section and set the **EP MEMBER Flag** to **YES**.
- Click on **SAVE**.

**RETENTION OF ACCOUNTS**

Motor Carriers that are also UIIA participants will be maintained in the system as long as they are active. Once a company is cancelled it is maintained in a cancelled status for 90 days. If the information to reinstate the account is not received within the 90-day period, then the account is deleted. This same process will be implemented for Non-UIIA Motor Carriers companies.

Non-UIIA Motor Carrier accounts that are pending will be maintained for 30 days. TRAC will receive an e-mail communication when the trucking company first registers. If the required information is not received to activate the account within the 30 day period then the pending account will be deleted. A 7-day warning letter will be sent to the trucking company prior to being deleted. TRAC will receive a copy of the 7-day warning along with the actual deletion notice should it occur.