Owner Operator Onboarding Checklist

HXITransportation & Logistics

PHASE 1: INITIAL CONTACT & QUALIFICATION

- ☐ Owner Operator inquiry received (website / referral / direct contact)
- ☐ Initial call or email completed
- ☐ Equipment type confirmed (Dry Van / Reefer / Flatbed / Power Only, etc.)
- ☐ Preferred lanes and operating regions identified
- ☐ Dispatch fee structure reviewed and agreed upon

PHASE 2: REQUIRED DOCUMENT COLLECTION

- ☐ Completed Dispatch Service Agreement
- ☐ W-9 Form
- ☐ MC Authority Letter (Active)
- ☐ DOT Certificate
- ☐ Certificate of Insurance (COI)
  - ☐ Auto Liability – $1,000,000
  - ☐ Cargo Insurance – $100,000 minimum
  - ☐ HXI listed as Certificate Holder
- ☐ Voided Check or Direct Deposit Authorization
- ☐ Driver's License (Front & Back)
- ☐ Truck Registration
- ☐ Trailer Registration (if applicable)

PHASE 3: COMPLIANCE & VERIFICATION

- ☐ MC authorityverified (FMCSA)
- ☐ DOT status confirmed active
- ☐ Insurance coverage verified and valid
- ☐ Equipment matches declared type
- ☐ Documents reviewed for completeness & legibility

PHASE 4: SYSTEM SETUP

- ☐ Carrier profilecreatedindispatchsystem
- ☐ Contact information entered (phone, email)
- ☐ Payment method entered and verified
- ☐ Preferred lanes loaded into system
- ☐ Load board access prepared (if applicable)

PHASE 5: ORIENTATION & EXPECTATIONS

- ☐ Dispatchprocess explained
- ☐ Load acceptance & rate confirmation process reviewed
- ☐ Communication expectations outlined
- ☐ BOL / POD submission requirements explained
- ☐ Detention, layover, TONU policies reviewed
- ☐ Non-exclusive agreement confirmed

PHASE 6: APPROVAL & ACTIVATION

- ☐ Carrierapprovedby HXIDispatchManager
- ☐ Approval notification sent to Owner Operator

- ☐ Carrier marked Active in system
- ☐ Ready for load assignment

PHASE 7: FIRST LOAD SUPPORT

- ☐ First load sourced and booked
- ☐ Rate confirmation reviewed with carrier
- ☐ Pickup details confirmed
- ☐ In-transit tracking initiated
- ☐ POD submitted within 24 hours of delivery
- ☐ Post-load follow-up completed

ONBOARDING STATUS TRACKER

- ☐ New Inquiry
- ☐ Documents Pending
- ☐ Under Review
- ☐ Approved
- ☐ Active

SUPPORT CONTACT

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