## PROCEDURES FOR ADDING OR UPDATING A CONTACT IN MCLEOD

Carrier Contact information changes will have to be completed by Carrier Management or the After Hours Team. This will include all phone numbers, email addresses and contact name changes. If you have a need to update contact information you should send the request to <a href="mailto:carriermanagement@beemac.com">carriermanagement@beemac.com</a> and <a href="mailto:afterhours@beemac.com">afterhours@beemac.com</a>.

- Once a request is received by Carrier Management / After Hours the team will look at the request and determine if it is simply adding a new name to a verified domain email. Ex. <u>dsmith@TGPtrucking.com</u> is asked to be added TGP Trucking's profile and the current is <u>bjones@TGPtrucking.com</u>, we will immediately complete this request. An email will be sent to the requestor that the task is complete.
- If the request is to add a different domain name to a carrier. Ex. Request for <a href="mailto:sfarmer@gmail.com">sfarmer@gmail.com</a> is asked to be added to <a href="mailto:bjones@TGPtrucking.com">bjones@TGPtrucking.com</a> this will require the below procedure to be followed. \* For all verifications not completed within 15 mins of the request an email response to the requestor and all in copy will be sent detailing what the delay is.
- It is further agreed that no contacts will be removed from McLeod and only additions can be made. If a fraudulent email is found in a current carrier's profile a note of fraudulent contact will be placed as the persons Title in the contacts tab.
- In all cases when conducting an update request telephone calls will be placed first to the carrier and emails will be a secondary attempt, but calls will always be the primary method of verifying the contact change.
- If a verification cannot be obtained, then the rate con can only be sent to the verified contact on file within FMCSA or GO Highway.
- The escalation plan should Carrier Management start to fall behind with requests will be to escalate the requests to Carrier Management's Supervisor, from there to the Director of Safety, and finally to the SVP of Beemac Services.



## **CARRIER MANAGEMENT/AFTER HOURS PROCEDURES**

- 1. Go to highway, look in the directory to see if the name is listed. Scroll down to the FMCSA information.
- 2. Go to <a href="https://ai.fmcsa.dot.gov/SMS">https://ai.fmcsa.dot.gov/SMS</a> enter in the DOT number look at the main number. See below.
- 3. Make the call to the owner first to see if the contact is an authorized user. Then send an email to the owner. Make sure to ask and include Name, email address and phone number.
- 4. If confirmed, then add the contact information into mcleod.
- 5. Please do not add any contacts that have not been verified.
- 6. If this is after hours and the main contact cannot be reached, the contact cannot be added until verified.
- 7. Do not send any rate cons to any unverified contacts via email. Only send them through McLeod.
- 8. If the contact information requested matches a corporate email address, it would be safe to add it. (ex. if we have an email address with @TGPtrucking.com and they are looking to add another email of @TGPtrucking.com Example <a href="mailto:dsmith@TGPtrucking.com">dsmith@TGPtrucking.com</a> and they want to add <a href="mailto:bjones@TGPtrucking.com">bjones@TGPtrucking.com</a> and its exactly the same we can simply add the new contact person. We should be weary of Gmail, Hotmail, Yahoo etc.) Always double check to make sure the corporate emails are identical.

