

MCP/IVG Conversion – AOB RD to ELD Process Checklist

Follow these six steps to move from AOB RDs to ELDs. You'll train your fleet administrators and drivers, update fields in the Hours of Service host application, update firmware, and enable ELD. Finally, we provide some guidelines for how your back office works within an ELD fleet and prepares for audits.

Have your fleet administrator print this checklist to ensure each step is completed in the order shown.

Step	Description	Tasks	Affected Party	Time
1. Back office training	Teach your back office Hours of Service users about the new fields, alerts, reports, and log editing as well as describe the new reports and how to use them, how to prepare for audits, other day-to-day tasks, and any changes you made to policies or procedures.	<ul style="list-style-type: none">○ Show new fields, what they mean<ul style="list-style-type: none">○ Company○ HOS Setup○ Driver○ Vehicle○ Teach how/when/why to run these reports; what to do next<ul style="list-style-type: none">○ Off duty driving○ UVA○ Violations○ Rejected Edits○ Diagnostics and Malfunctions○ Monitor/View Driver Summary for overview of Drivers and their current clocks and status○ Monitor/View Driver Chart/Details○ Daily summaries○ Detailed list of RODS<ul style="list-style-type: none">▪ Edit RODS if necessary○ Reconcile UVA via Vehicle Details	Fleet Administrators	2 hrs / shift or team

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		<ul style="list-style-type: none"> ○ Odometer Jump Report ○ Teach how to prepare for audits <ul style="list-style-type: none"> ○ Run ELD Driver Log report ○ Run Violations report ○ Edit or annotate driver's logs as necessary ○ Reconcile all unassigned vehicle activity ○ Validate (and correct if necessary) company and carrier information ○ Ensure that your drivers log in to an ELD and accept any changes you make ○ Rerun and reprint the ELD Driver Log and Violations reports 		
2. Driver training	<p>Ideally, you'd train all of your drivers at the same time on day one of their logs, but if your drivers rarely come in to the office, this process could take months.</p> <p>There is driver training built in to the ELD. If your drivers need coaching after you trained them, direct them to the Driver Training module to remind them of what they learned.</p>	<ul style="list-style-type: none"> ○ Teach differences between AOB RDs and ELDs: <ul style="list-style-type: none"> ○ Certify v Approve tab ○ All drive time is recorded ○ Drive time is recorded to the second ○ Co-drivers have to provide passwords to access their logs ○ Drivers must provide carrier and load information 	Drivers	3 hrs/driver or group of drivers

MAY CONTAIN U.S. AND INTERNATIONAL EXPORT CONTROLLED INFORMATION

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	<p>You may need to follow up with a refresher training after you've implemented ELD to remind them of their responsibilities and procedures.</p> <p>Don't skip this training! If done well, this greatly reduces back office log edits and calls from drivers about new popups or problems. If you can, get a demo unit (bag unit) from Omnitrac so that your drives can practice managing and edit logs in a way that doesn't affect their official logs of record</p>	<ul style="list-style-type: none"> ○ Drivers must select a duty status upon log in and log out ○ Review proper login/log out procedures to ensure logs are correct ○ Neither drivers nor back office can edit drive time ○ Drivers cannot select Drive duty status ○ Drivers may use special cases of Drive time: yard move and/or personal conveyance, if enabled <ul style="list-style-type: none"> ▪ Yard move and personal conveyance have specific methods for how to end them ○ Drivers are prompted to go in to on duty if the vehicle stops moving for more than five minutes ○ There are new diagnostic and malfunction alerts ○ Certification is done on a daily basis ○ Drivers are prompted to accept carrier edits ○ Drivers may be prompted to accept unassigned drive time 		

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		<ul style="list-style-type: none"> Drivers should be granted access to the Driver Portal so they can download their last 6 mos of logs 		
3. Update company, driver, and vehicle fields in the Hours of Service host application	<p>Some of this information could be pulled from your HR system and your company's list of assets. Then someone has to do manual data entry either to update each vehicle and driver by hand or to create spreadsheets of drivers and vehicles to import.</p> <p>Don't enable ELD until your drivers have been trained. If ELD is enabled and drivers are not able to maintain logs or provide information to enforcement officers, you'll be cited.</p>	<p>MANUAL UPDATE</p> <ul style="list-style-type: none"> Have each driver provide their CDL information. Collect the VIN and plate information for each piece of equipment. Update your company information to include your US DOT # Update your HOS Setup information to identify if yard move is allowed, and how it's terminated, if personal conveyance is allowed and if there's a restriction Update each driver to include CDL number and issuing authority (state or province), if they're ELD exempt, if yard move is allowed Update each vehicle to enable ELD, include the VIN and, if driven in Canada, plate number Give drivers access to the Driver Portal Enable alerts 	Fleet Administrators	Two weeks or longer
	Even if using the bulk import function, you'll still have to compile all the new	<p>BULK UPDATE</p> <ul style="list-style-type: none"> Have each driver provide their CDL information. 	Fleet Administrators	A week or longer

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	information as well as manually update company fields in the Hours of Service application.	<ul style="list-style-type: none"> ○ Collect the VIN and plate information for each piece of equipment. ○ Update your company information to include your US DOT # ○ Update your HOS Setup information to identify if yard move is allowed, and how it's terminated, if personal conveyance is allowed and if there's a restriction ○ Enable entity management bridge ○ Download the spreadsheet template for drivers and update it to include <ul style="list-style-type: none"> ○ CDL number and issuing authority (state or province) ○ If they're ELD exempt ○ If yard move is allowed ○ Download the spreadsheet template for vehicles and update it to include <ul style="list-style-type: none"> ○ VIN ○ If driven in Canada, plate number ○ Enable ELD ○ Give drives access to the Driver Portal ○ Enable alerts 		
4. Update firmware	This takes the truck off of the road and ties up your maintenance team. Each truck would to come in to the shop	MANUALLY <ul style="list-style-type: none"> ○ Alert drivers that they'll see changes even if still using as an AOB RD 	Maintenance	1-2 hr/truck over the course of days or weeks

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	and your maintenance team would manually perform each upgrade.	<ul style="list-style-type: none"> ○ Run fleet profile to ID units to update (Canadian customers – opt in to weekly firmware report email) ○ Print the fleet profile, give it to maintenance. ○ Download/Print the installation instructions. ○ Download the new firmware to a USB stick (Canadian customers - XXX) ○ Bring each truck to the office. ○ Have maintenance team upgrade each truck. 		
	The AOB RD has to be awake, ideally in a location with strong cellular or WiFi coverage, to get firmware update over-the-air, then the update should take under three hours.	OVER-THE-AIR <ul style="list-style-type: none"> ○ Alert drivers that they'll see changes even if still using as an AOB RD ○ Run fleet profile to ID units to update (Canadian customers – opt in to weekly firmware report email) ○ Print the fleet profile, contact hotline and ask that they schedule the upgrade. 	Maintenance	2-3 hr/truck over a week or so
5. Enable ELD	If you want to test ELD with a portion of your fleet, enable by depot or vehicle	<ul style="list-style-type: none"> ○ Enable by depot, vehicle, or all company at once 	Fleet Administrators	A few minutes to a few hours
6. Work within an ELD fleet	Tasks your staff should already do on a regular basis; if not, here's a reminder	<ul style="list-style-type: none"> ○ Run daily, weekly reports; resolve issues ○ Monitor daily <ul style="list-style-type: none"> ○ Driver Summary 	Fleet Administrators	

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		<ul style="list-style-type: none"> ○ Driver Charts/Driver Details ○ Detailed RODS ○ UVA in Vehicle Details ○ Do this to prepare for audits <ul style="list-style-type: none"> ○ Run ELD Driver Log report ○ Run Violations report ○ Edit or annotate driver's logs as necessary ○ Reconcile all unassigned vehicle activity ○ Validate (and correct if necessary) company and carrier information ○ Ensure that your drivers log in to an ELD and accept any changes you make ○ Rerun and reprint the ELD Driver Log and Violations reports 		

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