



The 11-Step Guide for Switching to A-Suite Comply

The Phases of Transition




Scanning

Your existing driver files will be scanned and prepared for the migration to the A-Suite Comply system.



Uploading

The scanned driver files will be transferred to a secure shared network server or cloud file manager. This serves as an interim storage location before moving them to A-Suite Comply.



Auditing & Updating

Once your driver files are uploaded, a Compliance Specialist will audit them for compliance and accuracy, notify drivers of their outdated files and update them with new versions in A-Suite Comply.



Records to Transition

- Employment Application
 - Previous Employment Verification
 - Annual Certificate of Violations
 - Employment Verification Consent/Authorization
 - Annual Review
 - Annual Motor Vehicle Report
 - Pre-Hire Motor Vehicle Report (“MVR”)
 - D&A Company Policy
 - Drug & Alcohol Pre-Employment Test
 - Drug & Alcohol Clearinghouse Query Results
- Drug & Alcohol Clearinghouse Limited Consent
 - Road Test or CDL Certificate
 - Medical Examiner’s National Registry Verification
 - Medical Examination Certificate (Med Card)
 - Copy of Driver’s License

Who Does What?

Here is who will be involved in a successful transition:



- **Project Manager:** Responsible for making sure every record gets in A-Suite in the forecasted time frame.
- **Compliance Specialist:** Audits each Record and takes action to fill any missing holes.
- **Scanning Team (if necessary):** Responsible for ripping staples of your DQ Files and scanning and preparing them for the Compliance Specialist.



Required Computer Software

- **Secure Shared Network Server or Cloud File Manager:** This is where your scanned driver files will be stored in PDF or image format before the final transfer.
- **A-Suite Comply:** The permanent storage and maintenance solution for your DQ Files and driver compliance records.

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1

Conduct a Project Kick-Off Meeting

ACTION ITEMS:

- The Project Manager proposes the game plan and schedule
- Deliver final schedule after the meeting



2

Load Driver Roster into A-Suite Comply

ACTION ITEM:

- The Compliance Specialist completes the Driver Roster and loads it into A-Suite Comply



3

Prepare Your On-Site Scanning Area

ACTION ITEMS:

- The Scanning Team designates container staging areas.
- Log and label containers



4

Begin Scanning

ACTION ITEMS:

- The Scanning Team prepares computers and begins scanning
- Maintain quality control so nothing gets lost or skipped



5

Load Driver Files into Cloud Storage Option

ACTION ITEMS:

- The Scanning Team creates a folder in the chosen cloud storage solution.
- Transfer scanned files and review them for quality



6

Load Scanned Files into A-Suite

ACTION ITEMS:

- Compliance Specialist loads PDFs from the cloud storage and uploads into A-Suite Comply.
- Compliance Specialist splits files or modifies as needed, and sets expiration dates



7

Delete Temporary Files

ACTION ITEMS:

- The Scanning Team deletes local files from their computers now that the records are in A-Suite



8

Set Up Your Compliance Dashboard

ACTION ITEMS:

- Work with your AvatarFleet Client Success Manager to review your Comply Dashboard and ensure it shows the reports that are important to YOU!



9

Set Your Compliance Rules

ACTION ITEMS:

- Set up your Compliance Rules to ensure they match what standards your company adheres to



10

Audit Driver Files

ACTION ITEMS:

- The Compliance Specialist reviews each Record for compliance and marks each reviewed Record as Pass or Fail



11

Request Updated Driver Files

ACTION ITEMS:

- Take corrective action on any out of compliance record on your Compliance Dashboard following the notes on each record
- Send requests to drivers either individually or in mass in A-Suite

