STT VERIFY QUICK START GUIDE

Starter Kit / Resource 1 of 3

Use STT Verify to review available carrier context and the driver verification status connected to that carrier. Then use the checklist and decision note in this kit to record your team's review and next step.

Set up your account

1 Create your account

Use the official registration link provided by STT Verify. Enter your work details and complete the account steps shown. Keep your sign-in information secure.

2 Choose the plan or usage option

Compare the options shown in your account. Check included lookups, feature access, the total price, and any recurring charges or automatic usage purchases. Read the renewal, cancellation, and refund terms before choosing.

3 Complete checkout and confirm access

Finish the checkout steps. Confirm the payment outcome and that the purchased access or usage is available in your account before running a lookup. If the outcome is unclear, check the account status or contact STT before paying again.

Run your first carrier review

4 Look up the carrier

Enter the carrier's DOT or MC number. Match the returned identifiers and legal name to the carrier you intend to use. Review the available carrier information and driver section. Record the source and time of your review.

5 Read the driver status and record the next step

Check the displayed status for the relevant driver. Use the Carrier Review Checklist to record gaps, then the Carrier Decision Note Template to capture your team's decision, evidence, and follow-up owner.

What Verified means

A driver's Verified status combines three conditions: an accepted DOT photo, a positive identity result, and acceptance of the Terms. The identity process requests an identity document and a matching selfie.

A COI upload is separate from this status. Uploading a COI does not validate insurance coverage and is not a condition for Verified. Continue any insurance confirmation required by your review process.

Using this kit These are separate manual resources. Fill them in with your own records; they do not run checks, save product results, or make a carrier-selection decision for you.

CARRIER REVIEW CHECKLIST

Starter Kit / Resource 2 of 3

Before dispatch, record what you reviewed, what remains unresolved, and who owns the next step. Apply your brokerage's review criteria to the specific assignment.

Carrier legal name [Name and DBA, if applicable]

DOT and MC identifiers [Identifiers] Load or case ID [Reference]

Reviewer and time [Name, role, date, time, and time zone]

Scope and policy [Assignment, relevant limits, and policy name/version]

1 Carrier identity and contact

Match the name and identifiers across the sources you use. Confirm the business contact through your approved method and record discrepancies.

☐ Reviewed ☐ Open ☐ Not applicable with reason

Finding and source reference [Result, gap, and evidence ID]

2 Operating authority

Review available authority type, status, dates, and notices relevant to the assignment. Record stale, missing, or conflicting information.

☐ Reviewed ☐ Open ☐ Not applicable with reason

Finding and source reference [Result, gap, and evidence ID]

3 Insurance information

Review available insurance documents or records for the named insured, dates, and scope. Record questions that need confirmation. A COI upload alone does not validate coverage.

☐ Reviewed ☐ Open ☐ Not applicable with reason

Finding and source reference [Result, gap, and evidence ID]

4 Driver and verification status

Confirm which driver is assigned through your approved workflow. Record that driver's displayed status and review time. A carrier's listed driver is not, by itself, confirmation of the assignment.

☐ Reviewed ☐ Open ☐ Not applicable with reason

Finding and source reference [Result, gap, and evidence ID]

5 Other information required by your policy

Review any other available records your policy calls for, such as safety information. Record the source date or reporting period, and any data limits.

☐ Reviewed ☐ Open ☐ Not applicable with reason

Finding and source reference [Result, gap, and evidence ID]

Record the outcome

List unresolved gaps or exceptions in the Carrier Decision Note Template. Record the decision, rationale, next action, owner, and due time. Use your team's hold or escalation process when an issue needs a decision.

Operational aid only. Completion does not establish safety, legal compliance, or insurance coverage.

CARRIER DECISION NOTE TEMPLATE

Starter Kit / Resource 3 of 3 / Decision and rationale

Record a review decision for one defined assignment or scope. Replace the prompts with observed facts and source references. Continue the evidence and follow-up record on the next page.

Who and what this record covers

Carrier legal name [Name and DBA, if applicable]

DOT and MC identifiers [Identifiers]

Load or case ID [Reference] Brokerage [Organization]

Review scope [Assignment, relevant dates, equipment, and limits]

Prepared by [Name and role]

Review time [Date, time, and time zone]

Policy applied [Name, version, and applicable criteria]

Status at the time of review

Carrier and authority [Observed result, relevant dates, and evidence IDs]

Insurance information [What was reviewed, questions remaining, and evidence IDs]

Assigned driver reference [Name or internal reference; assignment confirmation source]

Driver status [Exact displayed status, time checked, and evidence ID]

Other required checks [Observed facts, limitations, and evidence IDs]

Review decision

☐ Proceed for stated scope ☐ Hold ☐ Do not proceed ☐ Refer for decision

Rationale tied to evidence and policy

_____

_____

_____

Conditions or scope limits

_____

Decision maker [Name, role, date/time/zone, and signoff reference]

Record the team’s operational decision. Avoid conclusions that this note proves legal compliance, insurance coverage, or protection from claims.

EVIDENCE AND FOLLOW UP RECORD

Carrier Decision Note Template / Continued

Load or case ID [Same reference as the decision page]

Sources supporting the decision

Record the time you checked each source separately from its effective date or reporting period. Link to a saved record in your approved storage location where your policy requires one.

Evidence ID and topic	Source and saved record	Checked at and source date
E1 [Topic]	[Source name and link or record reference]	[Date, time, zone] [Source date or period]
E2 [Topic]	[Source name and link or record reference]	[Date, time, zone] [Source date or period]
E3 [Topic]	[Source name and link or record reference]	[Date, time, zone] [Source date or period]
E4 [Topic]	[Source name and link or record reference]	[Date, time, zone] [Source date or period]

Add evidence rows as needed. Record missing, delayed, disputed, or conflicting information below.

Open issues and next actions

Issue and effect on decision	Next action and owner	Due time and closure
[Gap, conflict, exception, or none identified]	[Action and responsible person]	[Date/time/zone] [Result or later record]
[Gap, conflict, exception, or none identified]	[Action and responsible person]	[Date/time/zone] [Result or later record]

Escalation and recheck

Escalated to [Person/role, question, time, and response reference; or none]

Hold release condition [Required evidence or decision, owner, and later signoff; if applicable]

Recheck trigger and owner [Policy interval, expiry, new information, or scope/status change]

Next review due [Date, time, time zone, and responsible person]

Record location [Approved folder or case link and applicable retention policy]

When facts or the assignment change, record the new review and decision. Keep prior records according to your brokerage's access, version, and retention rules.

Operational template only, not legal advice. Your brokerage sets its review criteria, decision authority, and escalation process. Completion does not establish safety, legal compliance, or insurance coverage.