

NEW CARRIERS, OWNER-OPERATORS, FLEET ADMINISTRATORS, AND DISPATCH TEAMS

Carrier Onboarding Checklist

Build a current, reviewable carrier record without confusing an upload with verified readiness.

This checklist separates official registration and insurance filing requirements from ordinary commercial packet, payment, equipment, dispatch, and platform steps. Requirements vary by operation, authority, commodity, jurisdiction, and contract. Use current official sources and qualified review.

HOW TO USE IT

1. Read the gates

2. Print the worksheet

3. Record actual results

Reviewed July 20, 2026 | Complete web version: loadladder.com/resources/carrier-onboarding-checklist

WORKFLOW 1 OF 6

1. Carrier identity

Use the exact legal operating identity rather than a trade name, dispatcher name, or filename.

[]	Business record Record legal name, DBA when applicable, business address, EIN handling, and authorized contacts.
[]	USDOT and authority Record USDOT and any applicable operating-authority identifiers and verify current status.
[]	Registration obligations Confirm applicable registration and renewal steps through official sources.
[]	Authorized users List owner, safety, dispatch, billing, and driver contacts allowed to provide instructions.

WORKFLOW 2 OF 6

2. Insurance evidence

Insurance requirements vary. Review the insurer and official filing record rather than trusting an upload alone.

[]	Federal filings Review the applicable FMCSA filing requirements for the authority and operation.
[]	Certificate Confirm insured name, policy, dates, coverage types, limits, and issuing agent.
[]	Commercial requirements Separate legal minimums from broker, shipper, lease, cargo, or factoring requirements.
[]	Expiration Set review reminders and fail closed when current evidence cannot be confirmed.

WORKFLOW 3 OF 6

3. Commercial packet

Protect sensitive records and preserve version, verification, and expiration information.

[]	W-9 Keep the current signed form private and never expose taxpayer information in public links or analytics.
[]	Authority and insurance Store current evidence with verification date and reviewer.
[]	Payment instructions Record remittance details through a controlled process and independently confirm changes.
[]	Factoring When applicable, record the factor, Notice of Assignment, remittance instructions, and provider contact.

WORKFLOW 4 OF 6

4. Operating profile

Dispatch readiness requires a clear picture of what the carrier can and wants to haul.

[]	Equipment Record truck and trailer types, dimensions, capacity, securement, temperature, endorsements, and constraints.
[]	Markets Record home base, radius, preferred and excluded markets, border or port capability, and repositioning limits.
[]	Schedule Record availability, home time, appointments, team or solo operation, and location or hours use.
[]	Rules Record commodity exclusions, specialized capability, broker restrictions, and rate boundaries.

WORKFLOW 5 OF 6

5. Dispatch authorization

Make permissions explicit, limited, auditable, and reversible.

[]	Agreement Keep current version, parties, effective date, services, fees, termination, and signature evidence.
[]	Broker contact Record whether dispatch may contact, submit packets, negotiate, or receive confirmations.
[]	Rate and booking Define target, review, and walk-away thresholds and what still requires approval.
[]	Revocation Provide a pause or revoke path and stop on mismatch, fraud, or out-of-scope freight.

WORKFLOW 6 OF 6

6. Activation and maintenance

Completion is not permanent. Critical gates should fail closed when evidence expires or the operation changes.

[]	Source access Connect only carrier-owned or properly authorized access and keep credentials out of notes and email.
[]	Notifications Confirm recipients and consented channels for approvals, documents, dispatch, exceptions, and payment.
[]	Billing or pilot Confirm active plan or explicit pilot before managed work begins.
[]	Recurring review Recheck authority, insurance, equipment, rules, access, billing, and contacts on change or expiry.

PRINT CARRIER RECORD REVIEW

Preserve the original estimate or review. Add actual results separately so the decision process can improve.

Field	Working value
Legal carrier name	_____
DBA	_____
USDOT / MC	_____
Authority checked	Date _____ Reviewer _____
Insurance checked	Date _____ Expires _____
W-9 current	Version / date _____
Factor / NOA	_____
Equipment	_____
Home market / operating radius	_____
Dispatch agreement version	_____
Rate / lane rules reviewed	Date _____ Reviewer _____
Source access validated	Date _____ Reviewer _____
Billing or pilot confirmed	_____

FINAL REVIEW

☐	Identity matches official and commercial evidence
☐	Applicable authority is current
☐	Insurance evidence and filings reviewed
☐	Sensitive packet documents protected
☐	Equipment, markets, schedule, and rules recorded
☐	Dispatch authorization and approval boundaries current
☐	Source access, notifications, and billing ready
☐	Next recurring review scheduled

SOURCES AND BOUNDARIES

Use current authoritative records

These links are starting points for current official information. Requirements and records can change. This resource is not legal, tax, insurance, accounting, safety, or financial advice. It does not replace source terms, qualified professional review, carrier approval, or a counterparty's current requirements.

FMCSA registration starting point	https://www.fmcsa.dot.gov/registration/getting-started
FMCSA insurance filing requirements	https://www.fmcsa.dot.gov/registration/insurance-filing-requirements
FMCSA SAFER Company Snapshot	https://safer.fmcsa.dot.gov/CompanySnapshot.aspx
FMCSA registration transition updates	https://www.fmcsa.dot.gov/registration/move-motus

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