

EQUITABLE SOLUTIONS LLC

Carrier Onboarding Forms Pack

Forms and templates for a cleaner carrier intake process.

Digital Product | Website-ready PDF product

Created for the Equitable Solutions LLC dispatching website.

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This product is educational material, not legal, tax, financial, or insurance advice.

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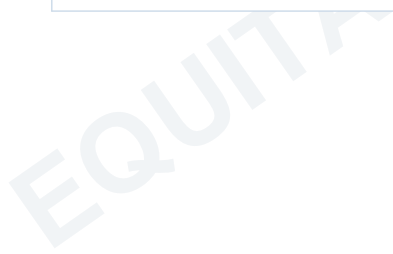
How to use this product

Use this PDF as a working business tool. Read the training pages first, then copy the checklists, scripts, worksheets, and templates into your own dispatch workflow. Customize the words to your business voice before using them with carriers.

Form 1 - Carrier intake sheet

This form collects the basic information you need before you search loads for a carrier. Do not skip this step.

Field	Carrier answer
Legal carrier name	
DBA name	
MC number	
DOT number	
Main contact name	
Phone	
Email	
Business address	
Equipment type	
Trailer length	
Weight capacity	
Preferred lanes	
No-go states/areas	
Max deadhead	
Minimum rate target	
Factoring company	
Insurance expiration date	



Form 2 - Equipment information sheet

Use one sheet per truck or trailer. This helps prevent bad load matches.

Equipment detail	Notes
Truck number	
Trailer number	
Equipment type	Dry van / reefer / flatbed / step deck / hotshot / box truck
Trailer length	
Max legal weight	
Tarping available?	
Liftgate?	
Pallet jack?	
Reefer temperature range	
Driver TWIC?	
Driver hazmat?	
GPS/tracking method	
Preferred appointment windows	



Form 3 - Document request checklist

Ask for these documents before you represent the carrier. Store everything in the carrier folder.

- Signed dispatcher-carrier service agreement.
- Carrier information sheet.
- Certificate of insurance.
- W-9 if needed for your records.
- Operating authority snapshot or verification note.
- Factoring notice of assignment if applicable.
- Driver contact information.
- Equipment list.
- Preferred lane profile.
- Payment authorization or invoice terms acknowledgment.

Form 4 - Carrier qualification call script

Dispatcher: Hi, this is [Name] with Equitable Solutions LLC. I want to make sure we only send you loads that match how you run. Can I ask a few quick questions about your truck, lanes, and rate target?

Questions: What equipment are you running? Where are you empty now? What lanes do you prefer? What areas do you avoid? How far will you deadhead? What rate do you need to move profitably? Do you use factoring? Who approves loads before booking?

Qualification rule

Do not onboard every carrier just because they answer the phone. A weak fit can create more problems than revenue. Look for clean communication, realistic lane expectations, active authority, insurance, and willingness to approve loads in writing.

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Form 5 - Dispatch authorization rules

This is a plain-English internal form. It does not replace a lawyer-reviewed agreement, but it helps clarify operating rules.

- Carrier must approve each load before booking.
- Dispatcher may communicate with brokers on behalf of carrier after written authorization.
- Dispatcher will not accept freight directly from shippers unless properly authorized/licensed.
- Dispatcher will not assign the carrier load to another carrier.
- Carrier is responsible for equipment, driver, compliance, safety, and delivery.
- Dispatcher payment terms are written and agreed before service begins.

Form 6 - Rate confirmation review checklist

Before the truck moves, review the rate confirmation carefully. Mistakes cost time and money.

- Correct carrier legal name and MC number.
- Correct pickup address and appointment time.
- Correct delivery address and appointment time.
- Correct commodity and weight.
- Correct agreed rate.
- Correct accessorial terms: detention, layover, lumper, TONU, tarp.
- Correct tracking requirements.
- Correct paperwork submission method.
- No hidden deductions or unclear terms.
- Carrier approved the final terms.

Form 7 - Carrier file folder setup

Use the same folder structure for every carrier so nothing gets lost.

- /Carrier Name/01 Agreements
- /Carrier Name/02 Insurance and Authority
- /Carrier Name/03 Rate Confirmations
- /Carrier Name/04 BOL and POD
- /Carrier Name/05 Invoices
- /Carrier Name/06 Compliance Reminders
- /Carrier Name/07 Notes and Communication

File naming example

2026-05-11_BrokerName_Load1234_CarrierName_RateConfirmation.pdf

Website copy for this product

Carrier Onboarding Forms Pack - Forms and templates for a cleaner carrier intake process. Includes carrier intake, equipment details, document request checklist, authorization rules, rate confirmation review checklist, and folder setup.

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Appendix

Source note: This product was drafted with reference to FMCSA final guidance on broker and bona fide agent definitions published June 16, 2023, and FMCSA broker registration guidance. Verify current requirements before publishing legal claims or training staff.

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