Street Interchange Portal – User Manual for Motor carriers

1. Login / Authentication

   **Motor carrier users** - can login to SI portal using their SCAC and UIIA application password

   [Image of login page]

   **MC Secondary users** – can login to SI portal using MC SCAC and their UIIA username and password as assigned by the Motor Carrier when setting up the user in the UIIA.

   [Image of login page]

   Link on login page will display Container Availability within the Street Interchange Application by size and type
**MC Drivers** – can login to SI portal using 8-digit IDD Pin assigned by IANA and MC SCAC OR Driver's license number, state of issuance and MC SCAC. A validation will be done against IANA’s IDD to ensure the driver accessing the Street Interchange portal is an active driver for the MC SCAC.

2. **Home Page / Dashboard** – This screen provides information regarding secondary users. It also provides a snapshot of the number of available equipment requests that have been submitted by the MC SCAC, how many street interchanges have been approved or are pending by the MC and the number of street interchange requests that have been requested by the MC SCAC year to date.
3. **Manage Secondary Users** – gives secondary users listing (only ACTIVE secondary users from the UIIA application). The MC can assign specific permissions to the users as to whether the secondary user can Initiate Street Interchanges and/or Initiate Street Interchanges as well as approve the street interchange transactions on behalf of the MC SCAC.

4. **Method of Communication** – this screen allows users to choose communication method as to how they wish to receive notifications from Street Interchange Portal. E-mail, EDI322 or XML via SFTP are the options for communications.
5. **Notification of Available Equipment** – from this screen, the Motor Carrier, Approved Motor Carrier Secondary User or Driver will be able to notify EP or authorized Third Party for the EP that equipment is available for street interchange. Upon entering chassis number, the system makes a request to GIER system and identifies the responsible IEP for the unit. If unit is not in GIER then system will display “IEP NOT FOUND IN GIER” under “Chassis IEP SCAC” field. The system will also validate if the EP for the container is a participant in the IANA Street Interchange Application.

### Note:

1) If chassis field is left blank once user clicks submit, the system will auto populate the chassis ID field with ZZZZ999999 to identify it was a MC Provided chassis.

2) The IANA Location Code table will be used for Equipment Location and original Interchange Location fields. User will be able to lookup location by entering the first three number is zip code or entering a zip code range. If location is found it will be populated. If not found, user will have the ability to enter the location in the field. If the request is being made by mobile device then the zip code will be pre-populated based on GPS location.
6. **Notification of Available Equipment w/ DVIR** – from this same screen, user will have the ability to identify if a DVIR was reported for the equipment. If user selects “Y” for YES a DVIR was reported, then the system will open up DVIR pop up where user can report DVIR related information. The system would consider equipment location as the location where the DVIR occurred. Note DVIR Y/N field is optional if user if a Motor Carrier or Secondary User for a Motor Carrier, however if Driver the DVIR Y/N field is mandatory.
7. **Notification of Available Equipment – Confirmation Page** – this screen provides confirmation of the request to submit equipment into the available pool for street interchange. User can go back and edit the information if there’s typo. If not then user can hit “Confirm” button to submit the request. After confirmation user will not be able to make any modification to the request. **Please note that this does not initiate a street interchange request on the equipment.** User would need to go to INITIATE Street Interchange to start this process.
8. **Notification of Available Equipment Report** – users will be able to pull reports on the notifications (of available equipment) that was submitted by their company.

Note: Chassis Number ZZZZ999999 populated in the chassis number field identifies MC Provided Chassis.
9. **Search equipment available for interchange** - this screen allows users to search equipment available for street interchange and it also allows users to initiate street interchange request on a unit that has been made available for street interchange.
10. **Initiate Interchange Request** – from this screen users will be able to initiate new street interchange request by entering all mandatory fields (noted w/red *). User would have searched the available equipment for interchange first and if equipment is not found it would then initiate a new street interchange request.

System would display the fields to be completed. System will validate whether the Chassis ID is registered in GIER to identify the Chassis IEP SCAC. If MC B is initiating the interchange request, the system will check at this point to see whether MC B is valid with the EP SCAC for the container and EP SCAC for the Chassis in the UIIA. If Chassis EP SCAC is not UIIA participant, message will be returned, NON-UIIA EP and validation of the street interchange will only be provided for the Container EP.

If transaction goes through as set by the business rules, the specific EPs would receive notification to either approve or reject the street interchange request. Once approved by EPs, MC B would be notified to identify the condition of the equipment (Exhibit A of UIIA). If no issues noted by MC B on Exhibit A inspection, the street interchange would be automatically approved and all parties would be notified. If MC B notes any issues on the Exhibit A inspection, then MC A is notified and they must either agree or disagree with the equipment condition captured by MC B. All parties would be notified once MC A either agrees or rejects the Exhibit A inspection of MC B. **Please note that the EP, MC A and MC B all must approve of the transaction before the street interchange will be complete.**

Note: If no chassis provided on street interchange request, once user clicks submit the system will auto populate ZZZZ999999 for the chassis ID to identify that it was a MC Provided Chassis.
11. **Initiate Interchange Request – Confirmation Page** - this screen provides confirmation of street interchange request from where user can go back and edit the information if there’s typo. If not then user can hit “Confirm” button to submit the request. After confirmation user will not be able to make any modification to the request.

Once Street Interchange Request is submitted the involved EPs will be notified that a request to Street Interchange the equipment has been initiated. As it is important that responses to the street interchange requests are done timely, EPs will receive a reminder every 30 minutes for any requests that have not been responded to.
12. **Search Interchange Request** – this screen allows users to search interchange requests by various parameters. User can download the results in excel file as well as perform action on the requests. User can hit “Go” button from the search results and perform various actions.

**Note:** Chassis Number ZZZZ999999 populated in the chassis number field identifies MC Provided Chassis.
13. **Interchange request workflow** – this screen allows users to perform action as well as it allows user to view the workflow and status. User can download the request information in PDF. User can “Approve”, “Reject” or put street interchange requests “On Hold”. In case of “Reject” or “Hold” user will be asked to enter remarks. **Note:** All parties (EP, MC A and MC B) must approve the transaction before it is completed. The workflow will identify the next step in the process.
Interchange Request Approver's Work Flow

1. Scenario-1 – MC B / Secondary user of MC B or Active Driver of MC B is the initiator of Interchange Request
   - 1st Approver would be EP / Designated Third party (EP secondary user can also approve if allowed). Note: EP for both the container and chassis would be required to approve interchange request as long as both EPs are UIIA participants.
   - Once request approved by EP(s), the system would then notify MC B to enter equipment condition as per UIIA Exhibit A.
   - If no conditions noted on Exhibit A by MC, the street interchange request would automatically be approved. If issues noted with the equipment condition by MC B, then MC A would be notified to see if they agreed with condition noted. MC A would have the ability to accept, reject or put the transaction on hold.
   - If MC A accepts equipment conditions noted by MC B, then all parties are notified that the street interchange request is completed. In a case of rejection or hold, all parties would be notified of this action by MC A and street interchange would not be completed.
   - All the parties involved in the transaction will be notified via EDI/XML/Email once request has been either approved, rejected or put on hold.

2. Scenario-2 – MC A / Secondary user of MC A or Active Driver of MC A is the initiator of Interchange Request
   - 1st Approver would be EP / Designated Third party (EP secondary user can also approve if allowed). Note: EP for both the container and chassis would be required to approve interchange request as long as both EPs are UIIA participants.
   - 2nd Approver would be MC B and the system would ask MC B to enter equipment condition as per UIIA Exhibit A.
   - 3rd Approver would be MC A unless no conditions noted on Exhibit A inspection by MC B. (MC A can put the request on hold / reject / Accept). Note if no conditions noted on Exhibit A inspection by MC B, street interchange request would be automatically approved.
   - All the parties involved in the transaction will be notified via EDI/XML/Email once transaction has been approved, rejected or put on hold.

   - 1st Approver would be MC B and the system would ask MC B to enter equipment condition as per UIIA Exhibit A.
   - If issued noted on MC B Exhibit A inspection, then MC A would be notified to confirm if agrees with conditions noted. (MC A can put the request on hold / reject / Accept). Note if no conditions noted on Exhibit A inspection by MC B, street interchange request would be automatically approved.
   - All the parties involved in the transaction will be notified via EDI/XML/Email once transaction has been approved, rejected or put on hold.

Important Note: The system will check pending street interchange transactions and will send notification to the party that is next to take action on the transaction every 30 minutes. A transaction can remain in pending status for 24 hours after which it will automatically get rejected and all the parties will be notified. Also, the system will be capable of accepting inbound EDIs to Street interchange system to approve/reject/On-hold transactions.