Use Case 3: Driver Onboarding and Document Verification for Trucking

TaskAtlas gives a carrier with no HR system one secure place to collect, verify and track every new driver's documents, with a verify button for each one and reminders before anything expires.

Illustrative scenario: for this example we will use Coldwater Freight Lines, and all figures are estimates for demonstration, not measured results.

At a glance

Company	Coldwater Freight Lines
Industry	Long-haul trucking, including cross-border runs
Size	140 drivers, 25 office and shop staff
Volume	About 6 new drivers a month
Workflow	New driver onboarding and document verification
Current tools	Paper files, email and a shared spreadsheet; no HR system
Who uses it	New drivers (on their phone), safety and compliance, payroll, dispatch

The challenge

Coldwater can't put a driver on the road until a stack of documents is collected and checked, and today that stack lives in paper folders and email.

- **Many documents, many sources.** Licence, driver's abstract, medical, criminal record check, certifications, proof of eligibility to work, cross-border documents, benefits forms and emergency contacts.
- **Expiry dates slip.** Medicals, certifications and permits expire, and a spreadsheet doesn't warn anyone in time.
- **Audit exposure.** Carriers must keep complete driver files for safety audits, and a missing or expired document is a compliance finding.
- **Sensitive data in inboxes.** Work permits, health information and background checks get emailed around and saved in shared folders.
- **Slow to dispatch.** Every day a qualified driver waits on paperwork is a truck that isn't earning.

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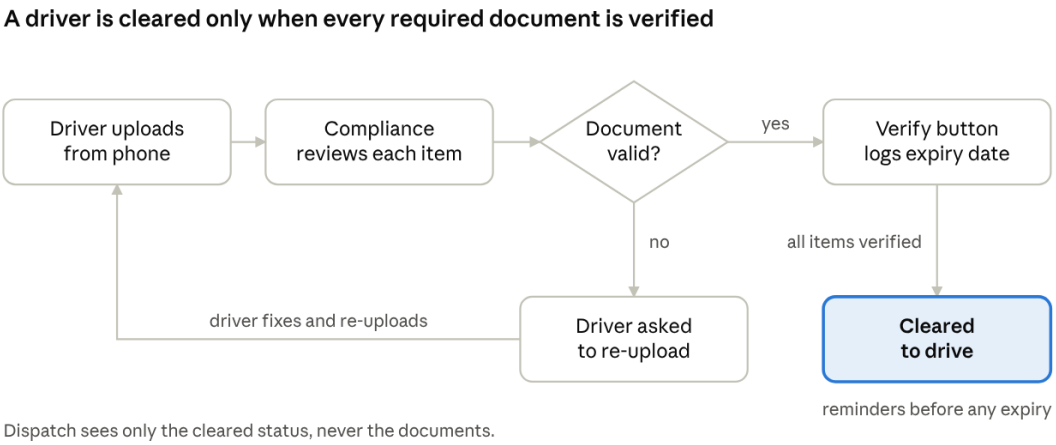
The workflow

The driver uploads everything from their phone, compliance verifies each item with one button, and the driver is cleared only when the checklist is complete.



driver onboarding · verify loop per document

1. **Secure collection.** The new driver gets a link, with no account needed, and uploads photos of each document and fills in the forms.
2. **Review per document.** Safety and compliance see a checklist of every required item and its status: missing, submitted, verified or rejected.
3. **Verification button.** For each document, the reviewer checks it, enters the expiry date and clicks **Verify**. A rejected item goes back to the driver with a note.
4. **Cleared to drive.** When every required item is verified, the driver's status changes and dispatch is notified.
5. **Expiry tracking.** TaskAtlas reminds the driver and compliance before any document expires.

Item collected	Verified by	Tracks expiry
Commercial driver's licence and endorsements	Safety and compliance	Yes
Driver's abstract	Safety and compliance	Yes (renewed yearly)
Medical examination report	Safety and compliance	Yes
Criminal record check	Safety and compliance	No
Certifications, such as dangerous goods (TDG)	Safety and compliance	Yes
Proof of eligibility to work in Canada	Payroll	Yes, for work permits
Cross-border documents (passport, FAST card)	Safety and compliance	Yes
Benefits enrolment and banking	Payroll	No
Emergency contacts	Payroll	No

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Item collected	Verified by	Tracks expiry
Allergies or medical notes (voluntary)	Named first-aid contact only	No

Privacy, controls and audit trail

This workflow handles some of the most sensitive data an employer holds, so access is locked down by field, not just by workflow.

- **Field-level access.** Safety and compliance see licenses, abstracts and medicals; payroll sees banking and benefits; dispatch sees only "cleared to drive."
- **Health information kept separate.** Allergies, medical conditions and emergency notes are voluntary, stored separately, and visible only to named people who need them.
- **Collect only what's needed.** Forms ask for proof of eligibility to work in Canada (citizenship, permanent residency or a work permit), not more than the role requires.
- **Consent and notice.** The driver sees why each item is collected before submitting, as provincial privacy law (such as BC's PIPA) expects.
- **Verification log.** Each document records who verified it, when, and the expiry date entered.
- **Canadian hosting.** Documents are stored on Canadian servers, with retention rules for drivers who leave.

Before a live pilot, have Coldwater's privacy lead or legal counsel confirm what to collect and how long to keep it.

Illustrative impact

For 6 new drivers a month, a complete, verified file could cut time-to-dispatch from about two weeks to under one, and expired documents would be flagged before they lapse.

Measure	Before TaskAtlas	With TaskAtlas (estimated)
Days from hire to cleared to drive	About 10 working days	About 4 working days
Office time collecting documents per driver	About 4 hours	About 1 hour
Driver files complete at audit time	Often missing items	Complete, with a checklist per driver
Expiry warnings	Manual spreadsheet checks	Automatic reminders before expiry
Sensitive documents in email	Common	None; uploaded to the secure record

Assumptions: 6 new drivers a month; time saved comes from self-service uploads and removing paper chasing. Replace with real pilot data before quoting externally.

Demo script

About five minutes; the moment that lands is the checklist turning green as each document is verified.

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1. **Set the scene (30 sec).** "Coldwater has no HR system. A new driver means a folder of paper and a lot of email. Watch this on a phone."
2. **Submit as the driver (1 min).** Open the link on a phone. Photograph a licence and a medical certificate, fill in emergency contacts, and submit.
3. **Show the checklist (1 min).** As safety and compliance, open the driver's record: each required document with its status.
4. **Verify (1 min).** Open the licence, enter the expiry date, and click **Verify**. Reject one blurry upload and show the driver's request to re-upload.
5. **Show privacy (30 sec).** Switch to the dispatch user: they see "cleared to drive" but none of the documents.
6. **Show expiry tracking (30 sec).** The dashboard of upcoming expiries across all drivers.
7. **Close (30 sec).** "Every carrier, clinic and contractor with certified staff has this exact problem."

Why it matters

This use case wins customers too small for an HR system but too regulated to run on paper, a large group that enterprise platforms overlook.

- **Industry package.** A ready-made trucking template (documents, verification, expiry tracking) can be sold again and again, including through resellers.
- **Same pattern elsewhere.** Construction, healthcare clinics, security firms and childcare all onboard certified staff with expiring credentials.
- **Sticky by design.** Once driver files and expiry tracking live in TaskAtlas, they become part of the carrier's audit readiness, which is hard to replace.
- **Natural add-ons.** Maintenance requests, vehicle inspections and incident reports for the same fleet.

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