

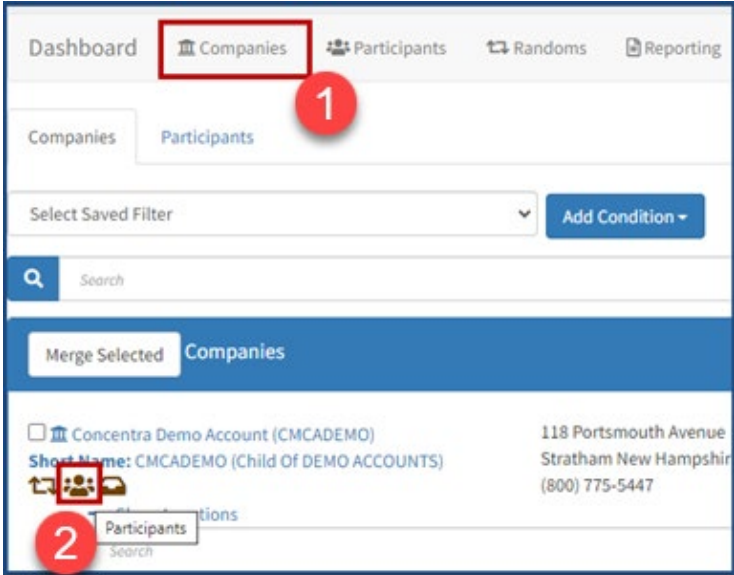
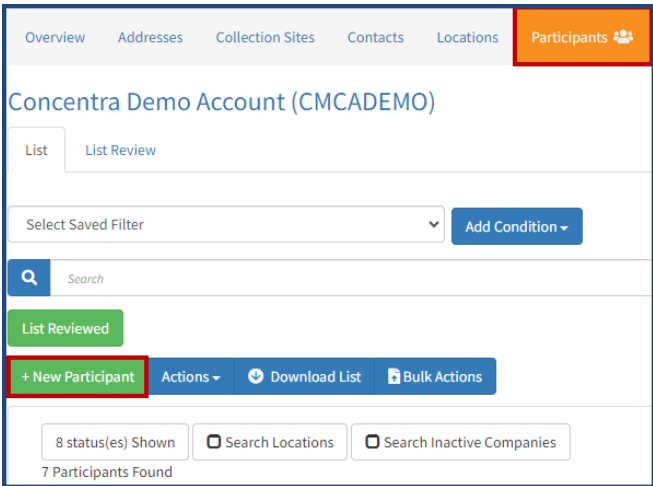
Participant Management: Adding a Participant – Quick Guide

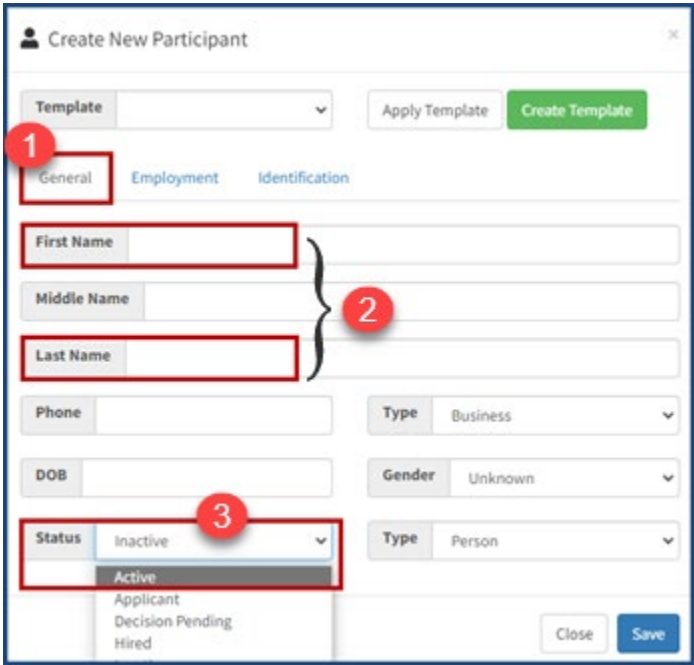
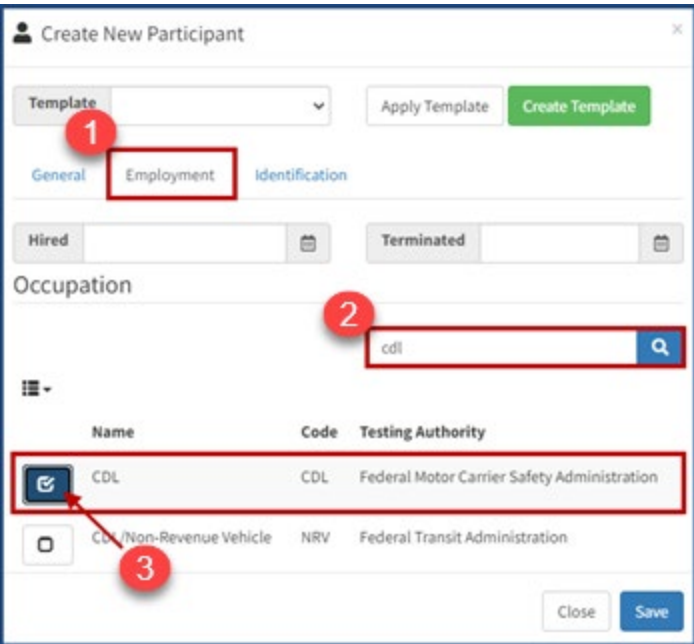
How to Manage the Participants in Your Company

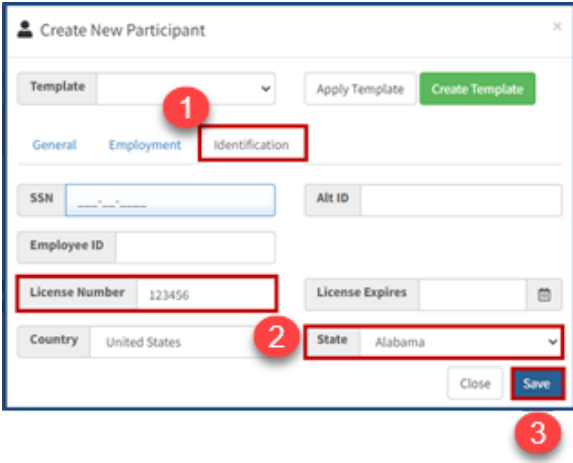
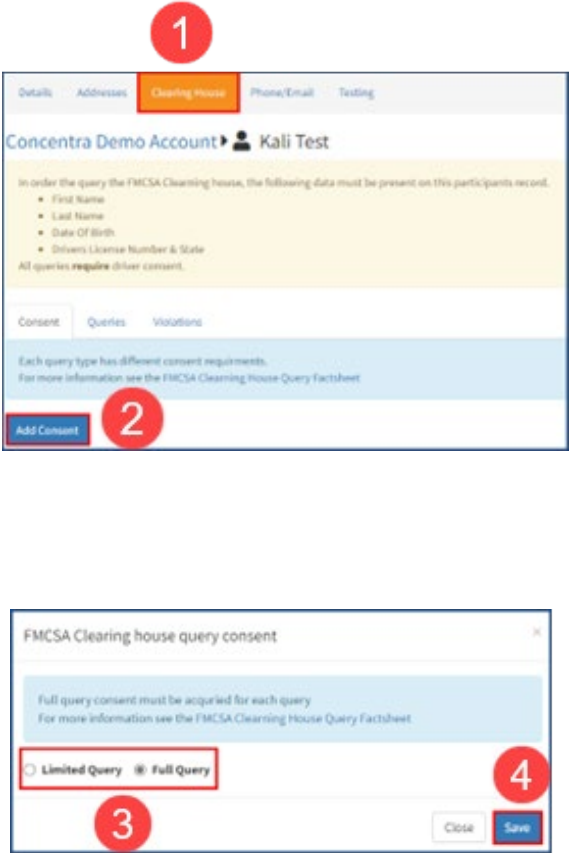
The CMCA Portal lets you manage the Participants in your testing program.

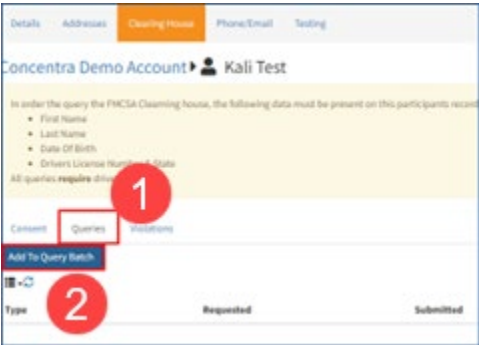

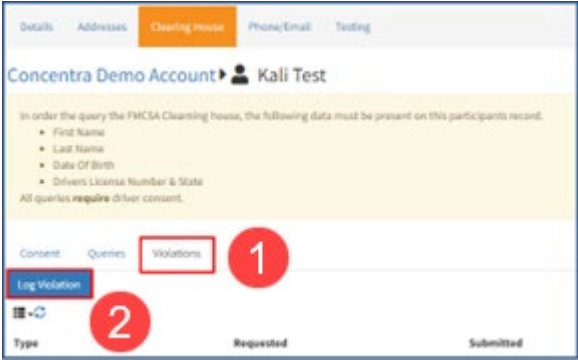
Participant Management – Adding a Participant

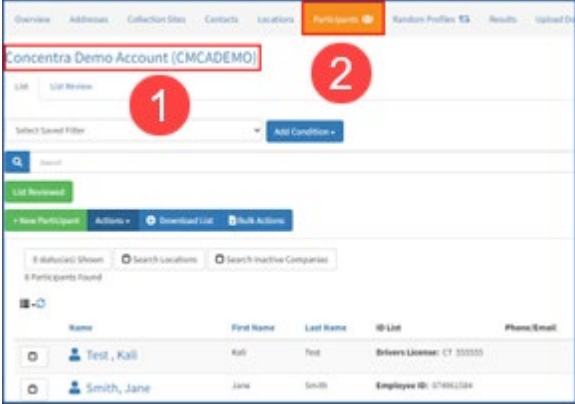
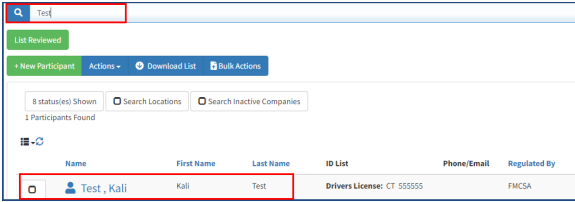
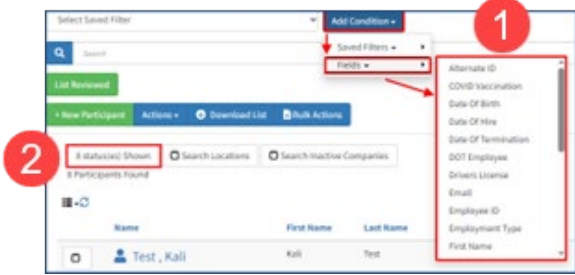
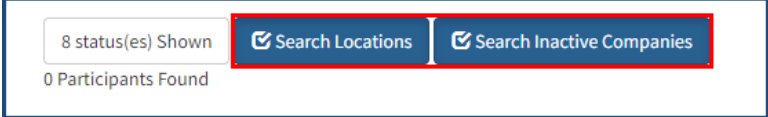
Use the following steps to add a new participant and document clearinghouse consent.

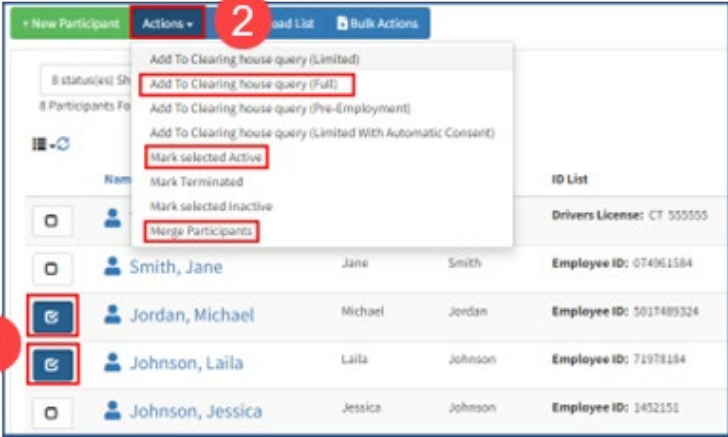
#	Instructions	CMCA Screens
1	<p>Access the Participants page</p> <ol style="list-style-type: none"> 1. Click the Companies tab. 2. Click the Participants icon. 	 <p>The screenshot shows the CMCA Dashboard with the 'Companies' tab selected. A red box highlights the 'Companies' tab, and a red circle with the number '1' highlights the 'Participants' icon in the top navigation bar. Below, the 'Participants' icon in the company details section is highlighted with a red circle and the number '2'.</p>
2	<p>Click the + New Participant button to create a new participant.</p>	 <p>The screenshot shows the 'Participants' page for 'Concentra Demo Account (CMCADEMO)'. The '+ New Participant' button is highlighted with a red box. Other visible elements include the 'List' and 'List Review' tabs, a search bar, and a list of participants.</p>

#	Instructions	CMCA Screens
3	<p>Complete the Create New Participant Fields</p> <ol style="list-style-type: none"> 1. Click the General tab. 2. Enter the new participant's First and Last Name. 3. Select the new participant's Status. <p>Note: Only participants with an active status will be eligible for selection.</p>	
4	<p>Add a Job Title</p> <ol style="list-style-type: none"> 1. Click the Employment tab. 2. Complete a search for the participant's Occupation. 3. Click the checkbox next to the occupation name to select the employment type. <p>Note: For DOT-covered employees the employment assignment is how the participant is categorized for DOT reporting.</p>	

#	Instructions	CMCA Screens
5	<p>Enter ID Text</p> <ol style="list-style-type: none"> 1. Click the Identification tab. 2. Enter all data for the selected ID type. 3. Click Save to add the new participant. <p>Note: After adding the participant, the details of that new record will display.</p>	
6	<p>Record the Participant's Consent</p> <ol style="list-style-type: none"> 1. Click the Clearing House page. 2. Click Add Consent to record the Participant's consent to FMCSA Clearinghouse queries. <p>Note: Either a limited consent with an expiration date or full consent can be selected.</p> <ol style="list-style-type: none"> 3. Select Limited Query consent with an expiration date or Full Query consent. 4. Click Save. 	

#	Instructions	CMCA Screens										
7	<p>Include Participant in Batch Query.</p> <ol style="list-style-type: none"> Click the Queries tab. Click Add to Query Batch to include the participant in the next batch query to be submitted to the FMCSA for Clearinghouse TPA services. Select the applicable batch query. Click Save. <p>Note: Pending and completed queries and displayed in the list.</p>	  <table border="1" data-bbox="656 911 1305 1022"> <thead> <tr> <th>Type</th> <th>Requested</th> <th>Submitted</th> <th>Response</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>Full</td> <td>Sep 1, 2023</td> <td>Unknown</td> <td>Unknown</td> <td>Pending</td> </tr> </tbody> </table>	Type	Requested	Submitted	Response	Status	Full	Sep 1, 2023	Unknown	Unknown	Pending
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8	<p>Record Driver Violation(s)</p> <ol style="list-style-type: none"> Click the Violations tab. Click Log Violation to record the driver's violation(s). <p>Note: You are not automatically set up for this service, even if you currently use CMCA for your Clearinghouse TPA services. Please reach out to CMCA customer support for more information.</p>											

#	Instructions	CMCA Screens
9	<p>Review the Participant List</p> <ol style="list-style-type: none"> Click the company name. Click the Participants tab to review the participants on the list. <p>Note: The Participant list can be searched by first or last name or select an item from the pop-up list for advanced searching.</p>	 
10	<p>Adding a Filter</p> <ol style="list-style-type: none"> Add and save filters based on various listed values. Use the Statuses Shown button to toggle Active, Inactive, and individual statuses. 	
11	<p>Click the Search Locations and Search Inactive Companies options to include Participants from child-Companies, even if the location is currently inactive.</p>	

#	Instructions	CMCA Screens																																
12	<p>Update/Change Action Options</p> <ol style="list-style-type: none"> 1. Click the checkbox for one or more Participants in the list. 2. Click the Actions button to update the status, add them to a Clearinghouse query, or merge two records if someone has been duplicated. 	 <p>The screenshot shows the CMCA interface with a list of participants. The 'Actions' dropdown menu is open, showing options like 'Add To Clearing house query (Full)', 'Mark selected Active', and 'Merge Participants'. Red boxes and numbers 1 and 2 highlight the 'Actions' button and the dropdown options respectively.</p> <table border="1" data-bbox="639 268 1362 701"> <thead> <tr> <th colspan="4">CMCA Screens</th> </tr> </thead> <tbody> <tr> <td colspan="4"> <div style="display: flex; justify-content: space-between;"> + New Participant Actions 2 Load List Bulk Actions </div> </td> </tr> <tr> <td colspan="4"> <div style="display: flex; justify-content: space-between;"> <div style="width: 60%;"> <p>8 statuses 5A</p> <p>8 Participants Fo</p> <p>Refresh</p> <p>Name</p> <p>Mark Terminated</p> <p>Mark selected Inactive</p> <p>Mark selected Active</p> <p>Merge Participants</p> </div> <div style="width: 35%;"> <p>ID List</p> <p>Drivers License: CT 555555</p> </div> </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <tbody> <tr> <td style="width: 5%;"><input type="checkbox"/></td> <td style="width: 45%;">Smith, Jane</td> <td style="width: 10%;">Jane</td> <td style="width: 10%;">Smith</td> <td style="width: 30%;">Employee ID: 074961584</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Jordan, Michael</td> <td>Michael</td> <td>Jordan</td> <td>Employee ID: 5017489324</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Johnson, Laila</td> <td>Laila</td> <td>Johnson</td> <td>Employee ID: 71978184</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Johnson, Jessica</td> <td>Jessica</td> <td>Johnson</td> <td>Employee ID: 1452151</td> </tr> </tbody> </table> </td> </tr> </tbody> </table>	CMCA Screens				<div style="display: flex; justify-content: space-between;"> + New Participant Actions 2 Load List Bulk Actions </div>				<div style="display: flex; justify-content: space-between;"> <div style="width: 60%;"> <p>8 statuses 5A</p> <p>8 Participants Fo</p> <p>Refresh</p> <p>Name</p> <p>Mark Terminated</p> <p>Mark selected Inactive</p> <p>Mark selected Active</p> <p>Merge Participants</p> </div> <div style="width: 35%;"> <p>ID List</p> <p>Drivers License: CT 555555</p> </div> </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <tbody> <tr> <td style="width: 5%;"><input type="checkbox"/></td> <td style="width: 45%;">Smith, Jane</td> <td style="width: 10%;">Jane</td> <td style="width: 10%;">Smith</td> <td style="width: 30%;">Employee ID: 074961584</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Jordan, Michael</td> <td>Michael</td> <td>Jordan</td> <td>Employee ID: 5017489324</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Johnson, Laila</td> <td>Laila</td> <td>Johnson</td> <td>Employee ID: 71978184</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Johnson, Jessica</td> <td>Jessica</td> <td>Johnson</td> <td>Employee ID: 1452151</td> </tr> </tbody> </table>				<input type="checkbox"/>	Smith, Jane	Jane	Smith	Employee ID: 074961584	<input type="checkbox"/>	Jordan, Michael	Michael	Jordan	Employee ID: 5017489324	<input type="checkbox"/>	Johnson, Laila	Laila	Johnson	Employee ID: 71978184	<input type="checkbox"/>	Johnson, Jessica	Jessica	Johnson	Employee ID: 1452151
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