

Operations Department (OD) — Complete SOP Set

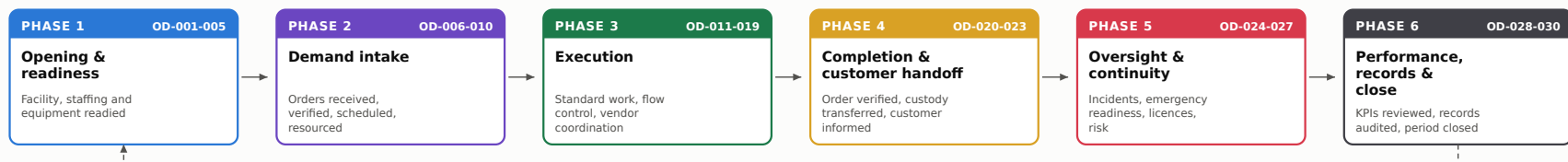
Archetype: TRANSPORT_SUPPORT · Transport Support

Tier: Free (entire Operations department) · Modules: 30 · Standard: locked 13-section

Contents

PHASE	MODULES
1 · Opening & readiness	OD-001 ... OD-005
2 · Demand intake	OD-006 ... OD-010
3 · Execution	OD-011 ... OD-019
4 · Completion & customer handoff	OD-020 ... OD-023
5 · Oversight & continuity	OD-024 ... OD-027
6 · Performance, records & close	OD-028 ... OD-030

FIGURE 1 — OPERATIONS WORKFLOW



Six phases · 30 modules · one continuous operating cycle, closing back into Phase 1 the next operating day.

Modules

- OD-001 — Daily Operations Opening Procedure
- OD-002 — Shift Handover & Briefing
- OD-003 — Staffing & Coverage Verification
- OD-004 — Work Area Readiness & Housekeeping Inspection
- OD-005 — Operational Equipment Availability Check
- OD-006 — Customer Order / Work Request Intake
- OD-007 — Order Verification & Acceptance Review
- OD-008 — Job Scheduling & Sequencing
- OD-009 — Resource & Capacity Allocation
- OD-010 — Incoming Material / Supply Verification
- OD-011 — Standard Work Execution & Process Adherence
- OD-012 — Work-in-Progress Tracking & Status Update
- OD-013 — Operational Handoff Between Work Stages
- OD-014 — Output Monitoring & Throughput Review
- OD-015 — Bottleneck Identification & Response
- OD-016 — Rework & Nonconforming Work Handling
- OD-017 — Schedule Deviation & Change Management
- OD-018 — Subcontractor & Vendor Coordination
- OD-019 — Interdepartmental Coordination Review
- OD-020 — Job / Order Completion Verification
- OD-021 — Delivery / Service Turnover
- OD-022 — Customer Communication & Status Notification
- OD-023 — Customer Feedback & Complaint Intake
- OD-024 — Operational Incident Reporting & Response
- OD-025 — Emergency & Business Continuity Readiness Check
- OD-026 — Regulatory, License & Permit Currency Verification
- OD-027 — Operational Risk Review
- OD-028 — Operational KPI Review
- OD-029 — Operational Records Retention & Documentation Audit
- OD-030 — End-of-Shift / End-of-Day Operations Closeout

Phase 1 — Opening & readiness

OD-001 — Daily Operations Opening Procedure

Estimated completion time: 30-60 minutes before first dispatch or first job

Provided for general informational and operational purposes as part of the Transport Support archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To establish a repeatable shift start-up and readiness sign-on sequence so that a Transport Support operation confirms staffing, communications, dispatch readiness, and go/no-go status before any customer work begins, reducing missed jobs, compliance gaps, and mid-shift stoppages.

2. Scope

Covers the daily opening sequence for the operating shift — facility/yard access, communications and dispatch check-in, personnel readiness sign-on, and the opening go/no-go authorization across facility-based and field-based service lines (towing/recovery, road-transport support, packing and crating, and other transportation support). Excludes work-area housekeeping (see OD-004), equipment/vehicle availability confirmation (see OD-005), and safety-specific readiness (see SD-001).

3. Responsibilities

- Operations Supervisor — owns the opening sequence, authorizes the shift go/no-go, and signs off readiness before work is released.
- Dispatcher / Operations Coordinator — confirms communications, job queue, and roster; records sign-on and open-shift status.
- Shift Operator / Field Personnel — completes personal readiness sign-on (credentials current, fit for duty, assignment acknowledged) and reports any opening exception.

4. Required PPE & Lockout/Tagout

- Standard facility PPE for the assigned service line where personnel enter operating areas (high-visibility vest, safety footwear); office/dispatch roles require none.
- Not applicable — no hazardous energy is controlled by this procedure; energy-isolation and equipment servicing are handled under SD-001 and OD-005.

5. Regulatory References

- 49 CFR Part 390–391 (FMCSA — general applicability, driver qualification) where the service line operates commercial motor vehicles; 49 CFR Part 395 (Hours of Service) where applicable.
- 29 CFR 1910 (OSHA General Industry) and 29 CFR 1904 (recordkeeping) for facility-based readiness and injury/exception logging.
- Applicable state motor-carrier / operator licensing and local business-operations requirements.
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

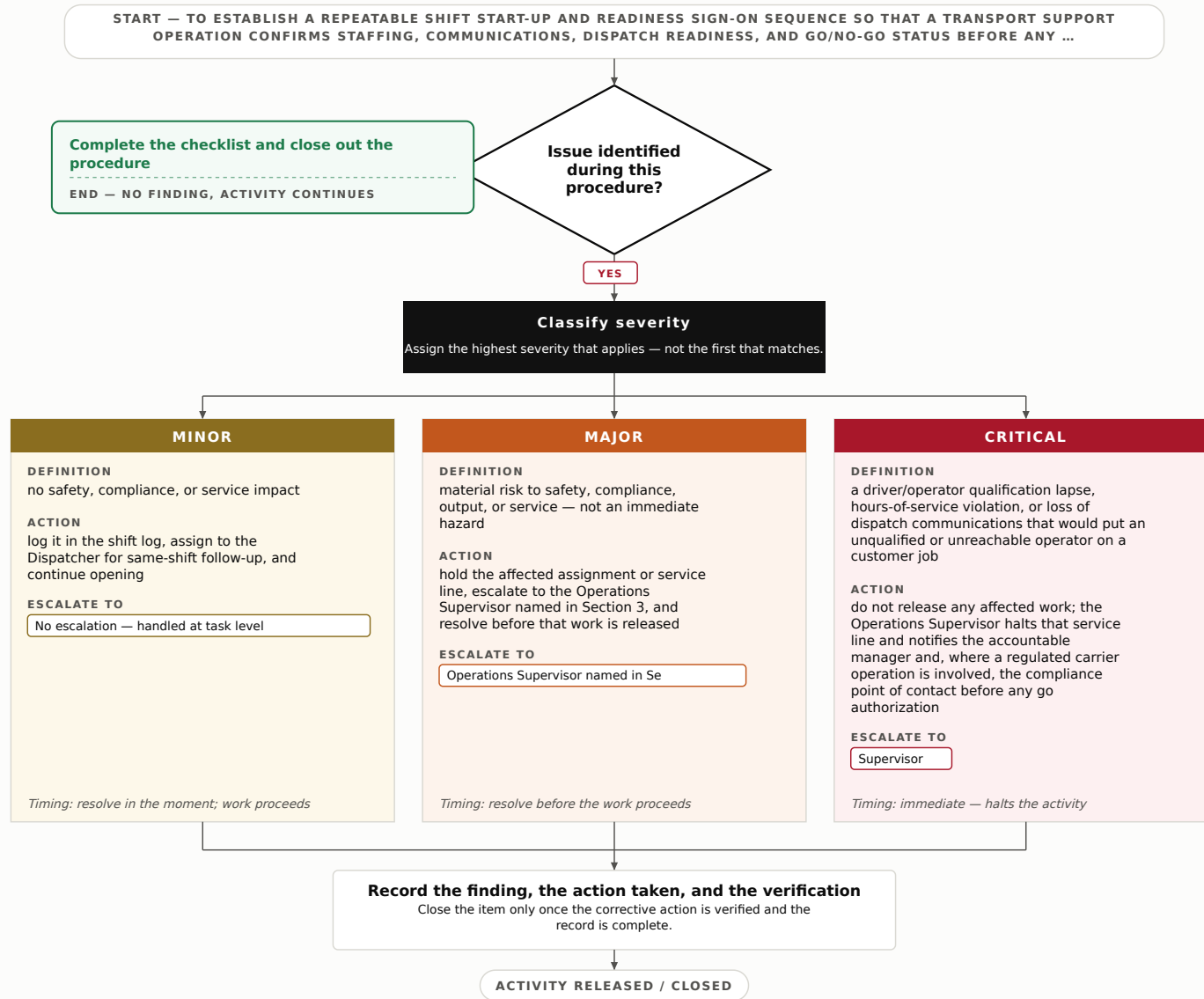
6. Process Flow



7. Step-by-Step Procedure

1. Open the facility/yard for the shift and confirm access controls, lighting, and site entry are functional; note any access exception for follow-up.
2. Confirm communications are live — dispatch radio/phone lines, mobile data terminals, and navigation systems power on and connect; verify contact with any early field personnel.
3. Retrieve the current job queue and open orders; confirm customer commitments, scheduled pickups, and outbound service turnovers to the distribution channel are visible and assigned.
4. Conduct personnel readiness sign-on: verify each on-shift operator's credentials/qualifications are current, fit-for-duty is affirmed, and the assignment is acknowledged.
5. Confirm hand-offs from prior shift or closing log — pending jobs, holds, and any carried-over exceptions — and reconcile against the queue.
6. Verify readiness inputs owned by adjacent procedures are cleared: equipment availability confirmed per OD-005 and safety readiness confirmed per SD-001 (reference only; do not re-perform).
7. Classify and route any opening exception per Section 8; hold release of affected work until resolved.
8. Record the opening in the shift log with time, staffing, exceptions, and the Supervisor go/no-go decision; obtain sign-off before work begins.

8. Decision Tree

Decision Tree — Daily Operations Opening Procedure**READING THIS TREE**

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Communications and dispatch confirmed live before any assignment is released.
- Every on-shift operator has a completed, current readiness sign-on.
- Job queue reconciled against prior-shift hand-off with no unassigned open commitment.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Facility/yard access, lighting, and entry controls functional		
Dispatch communications and navigation systems live		
Current job queue / open orders retrieved and assigned		
All on-shift personnel readiness sign-on complete		
Prior-shift hand-off and holds reconciled		
OD-005 equipment availability and SD-001 safety readiness confirmed		
Opening go/no-go recorded and Supervisor sign-off obtained		

11. KPIs

- On-time shift open (ready before scheduled first job) $\geq$ 95% of shifts.
- Personnel readiness sign-on completion 100% before work release.
- Opening-related job delays or missed dispatches $\leq$ 1 per 30 shifts.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

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1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for TRANSPORT_SUPPORT.	Archetype Content Team

OD-002 — Shift Handover & Briefing

Estimated completion time: 15-30 minutes per shift-change

Provided for general informational and operational purposes as part of the Transport Support archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To ensure a complete, structured transfer of operational status, open jobs, equipment condition, and priorities from the outgoing shift to the incoming shift so no active work order, in-transit unit, or held load is lost across the shift boundary at a transport support operation.

2. Scope

Covers the outgoing→incoming handover of dispatch status, open work orders, in-progress towing/recovery or packing/crating jobs, customer commitments, and asset location for Operations personnel. Excludes the safety pre-shift briefing (covered under SD-003) and maintenance-crew handover (covered under MD-001).

3. Responsibilities

- Shift Supervisor (Operations) — owns the handover, confirms accuracy of the status board, and signs off completion.
- Outgoing Dispatcher/Lead — compiles open jobs, in-transit units, held loads, and pending customer commitments for transfer.
- Incoming Dispatcher/Lead — reviews, acknowledges, and accepts responsibility for all transferred items before assuming duty.

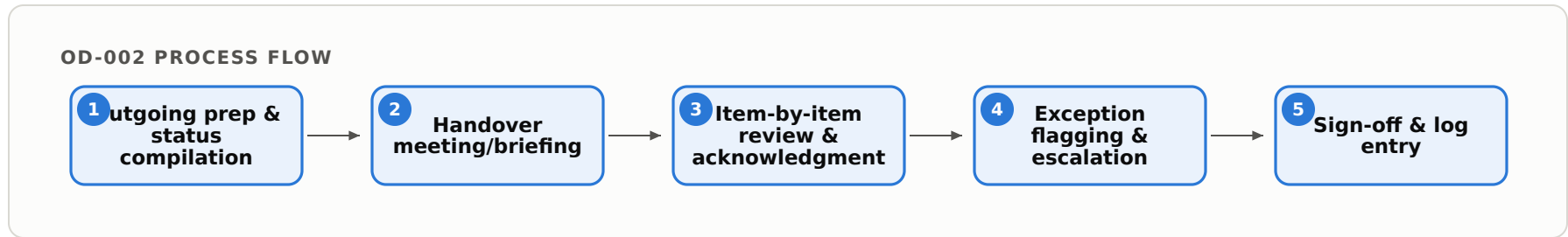
4. Required PPE & Lockout/Tagout

- Standard facility PPE per site policy; high-visibility apparel where the handover occurs in an active vehicle staging or yard area.
- Not applicable — no hazardous energy involved in the handover itself.

5. Regulatory References

- 49 CFR Part 395 (Hours of Service — driver/operator duty status where the service line operates commercial motor vehicles); 49 CFR Part 390 (general safety recordkeeping for motor carriers and support operations); 29 CFR 1904 (OSHA recordkeeping for any injury/illness noted at handover); internal Operations dispatch-log and job-status policy governs all members.
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

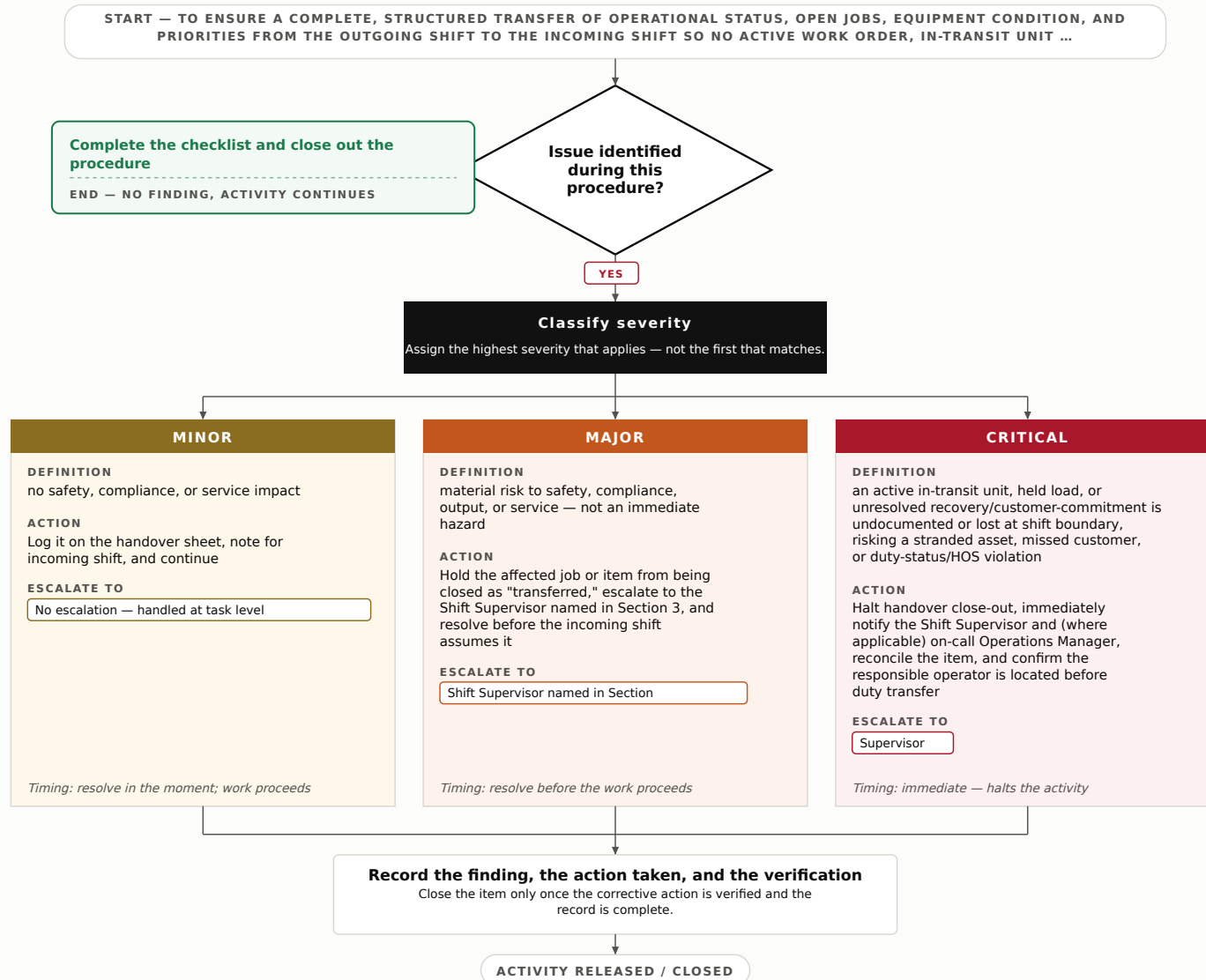
6. Process Flow



7. Step-by-Step Procedure

1. Outgoing Dispatcher/Lead freezes the status board and compiles all open work orders, in-transit units, held/staged loads, and pending customer commitments with ETAs.
2. Record current asset/unit locations, driver/operator duty status, and any equipment flagged out-of-service (referencing MD-001 for maintenance items — do not re-diagnose).
3. Note open customer issues, outstanding calls, and priority jobs requiring immediate incoming attention.
4. Convene the handover with incoming Dispatcher/Lead and Shift Supervisor at the shift boundary.
5. Review each open item in order of priority; incoming personnel question and confirm understanding of each.
6. Flag any exceptions (missing information, disputed status, overdue jobs) and classify per Section 8.
7. Incoming Dispatcher/Lead formally acknowledges acceptance of all transferred items.
8. Shift Supervisor verifies completeness and both parties sign the handover log; retain per internal retention policy.

8. Decision Tree

Decision Tree — Shift Handover & Briefing**READING THIS TREE**■ **No finding**

Activity stands. Complete the checklist and continue.

■ **Minor**

Handled in place at task level; no escalation.

■ **Major**

Supervisory decision required before the next stage.

■ **Critical**

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every open work order and in-transit unit accounted for with current status and location.
- All priority/customer-commitment items explicitly acknowledged by incoming personnel.
- Duty-status and out-of-service equipment notes cross-checked against source logs.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Status board frozen and open jobs compiled		
In-transit units and asset locations recorded		
Priority/customer commitments flagged with ETAs		
Out-of-service equipment noted (per MD-001)		
Incoming Dispatcher/Lead acknowledged all items		
Exceptions classified and escalated as needed		
Handover log signed by both parties		

11. KPIs

- Handover completion rate (signed log every shift): 100%.
- Lost/unaccounted open items at shift boundary: 0 per shift.
- Handover duration within target window: ≤ 30 minutes for $\geq 95\%$ of shifts.

12. Supervisor Verification

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1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for TRANSPORT_SUPPORT.	Archetype Content Team

OD-003 — Staffing & Coverage Verification

Estimated completion time: 15-30 minutes per operating period

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1. Purpose

To confirm, before each operating period begins, that every role required to run the service line safely and lawfully is present, currently qualified, and assigned to a defined coverage position — so that no dispatch, packing/crating job, or field response proceeds without adequate staffing.

2. Scope

Covers the pre-period verification that required roles (dispatchers, operators/drivers, riggers/packers, and on-duty supervisor) are physically present, hold current credentials, and are matched to open coverage positions for the operating period across facility-based and field-based service lines. Excludes the building of the shift roster and shift assignment, which is covered under HR-015, and verification of individual staff competency/skills, which is covered under TR-020.

3. Responsibilities

- Operations Supervisor (on-duty) — owns the coverage verification, confirms presence against required positions, and authorizes start of the operating period or holds work if coverage is incomplete.
- Dispatch/Coordination Lead — reconciles present staff against open jobs and field/route obligations; flags coverage gaps for critical positions.
- Compliance/HR Records Coordinator — maintains the current-credential status list (license, medical certification, endorsements) drawn upon during verification; does not adjudicate competency (see TR-020).

4. Required PPE & Lockout/Tagout

- Standard facility PPE where the verification occurs in an operations yard or bay (high-visibility vest, safety footwear); office/dispatch verification requires none.
- Not applicable — no hazardous energy involved in this verification task.

5. Regulatory References

- 49 CFR Part 391 (Qualifications of Drivers) and 49 CFR Part 395 (Hours of Service) — applicable to any member operating commercial motor vehicles or providing on-road/field transport support with drivers.
- 29 CFR 1904 (OSHA recordkeeping) and general 29 CFR 1910 duty-of-care provisions — applicable to all members as employers maintaining a work site.
- Fair Labor Standards Act (29 U.S.C. §201 et seq.) — governs on-duty status and coverage recordkeeping for all members.

- None additional sector-specific to all four members uniformly; where a service line does not operate CMVs, Part 391/395 applies as example only and internal staffing policy governs.
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

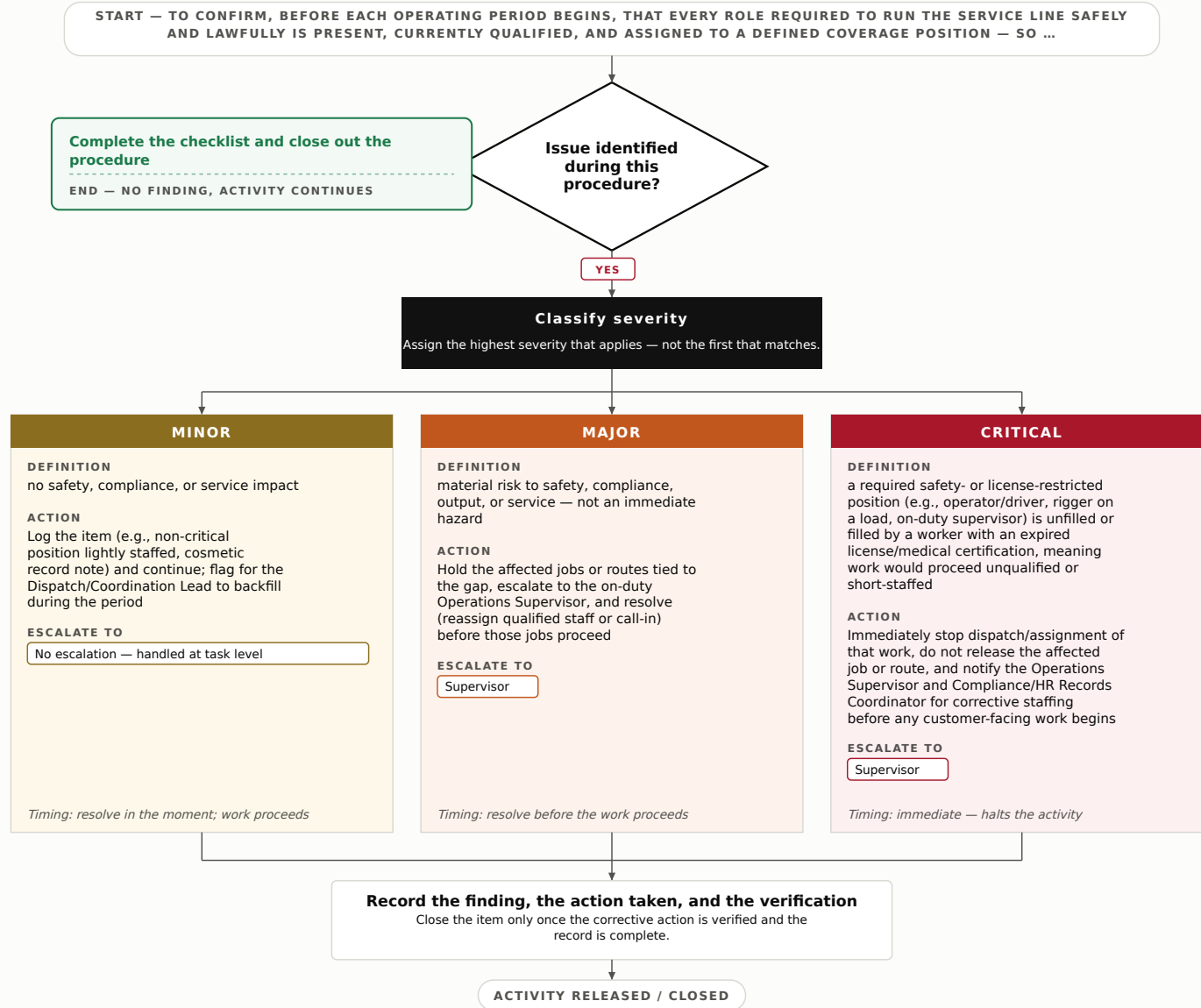


7. Step-by-Step Procedure

1. Retrieve the required-positions list for the operating period from the roster produced under HR-015; list each mandatory role and minimum count (dispatch, operators/drivers, riggers/packers, on-duty supervisor).
2. Confirm physical presence: check in each scheduled worker at start of period and note any no-show or late-arrival against the required-positions list.
3. For each present worker, verify current-credential status via the Compliance/HR Records Coordinator's list — license/endorsement validity, medical certification (where CMVs are operated), and any position-required certification not expired for the period.
4. Confirm hours-of-service and duty-status eligibility for the period so no assigned worker is placed into a slot that would breach available-hours limits (per Part 395 where applicable).
5. Match each present, qualified worker to an open coverage position; identify any position left uncovered or covered only by an unqualified/expired-credential worker.
6. For any uncovered critical position, apply the Decision Tree and hold affected work until resolved.
7. Record final coverage disposition: positions filled, gaps, substitutions, and start authorization time.
8. Log the completed verification and file per records policy; obtain supervisor sign-off before releasing the period to operations.

8. Decision Tree

Decision Tree — Staffing & Coverage Verification



READING THIS TREE

No finding

Activity stands. Complete the checklist and continue.

Minor

Handled in place at task level; no escalation.

Major

Supervisory decision required before the next stage.

Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every required position on the period list is accounted for as filled, substituted, or held.
- Every assigned worker's credential status is current for the position they occupy.
- Hours-of-service/duty eligibility confirmed for all field-based assignments (where applicable).
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Required-positions list for the period pulled and complete		
All scheduled staff checked in / presence confirmed		
Credentials (license, medical cert, endorsements) current for each position		
Hours-of-service/duty eligibility confirmed where CMVs operated		
Every open coverage slot matched to a present, qualified worker		
Any gap escalated and disposition recorded		
Verification logged and supervisor sign-off obtained		

11. KPIs

- Operating periods started with full required coverage: $\geq 98\%$
- Assignments made with expired/invalid credentials: 0
- Coverage verification completed before scheduled period start: 100%

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

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1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for TRANSPORT_SUPPORT.	Archetype Content Team

OD-004 — Work Area Readiness & Housekeeping Inspection

Estimated completion time: 20-45 minutes per shift start (per yard, staging bay, or field crew mustering point)

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1. Purpose

This procedure ensures that operational work areas — staging yards, loading/crating bays, dispatch stations, and field mustering points — are clear, organized, and free of hazards before the day's transport-support operations begin, so that personnel, vehicles, and material can move safely and efficiently.

2. Scope

Covers pre-shift readiness and housekeeping inspection of active operational work zones used for staging, packing/crating, dispatch coordination, and vehicle or equipment marshaling. Excludes warehouse housekeeping (see WH-023) and maintenance-shop housekeeping (see MD-025), which are authored in their own modules.

3. Responsibilities

- Operations Supervisor — owns the inspection, verifies completion, and authorizes work-area release for operations.
- Shift Lead / Crew Lead — performs the walkthrough, records findings, and coordinates corrective housekeeping before operations proceed.
- Operations Associate (yard, crating, or field crew member) — clears assigned zones, stows equipment and materials, and reports hazards encountered.

4. Required PPE & Lockout/Tagout

- Standard facility PPE: high-visibility vest or garment, safety footwear, gloves, and eye protection where housekeeping involves debris, banding, or fluid cleanup.
- Lockout/Tagout: Not applicable to routine housekeeping. Where a hazardous-energy source (parked powered equipment, hydraulic lift, or fueling point) is encountered during the walkthrough, do not service it under this procedure — isolate the area and refer to MD-025.

5. Regulatory References

- 29 CFR 1910.22 (Walking-Working Surfaces — housekeeping, aisles, and passageways)
- 29 CFR 1910.176 (Handling materials — general; clearance and orderly storage)
- 29 CFR 1910.1200 (Hazard Communication — labeling and containment of any chemicals/fluids in the work area)
- 29 CFR 1910.132 (General PPE requirements)

- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

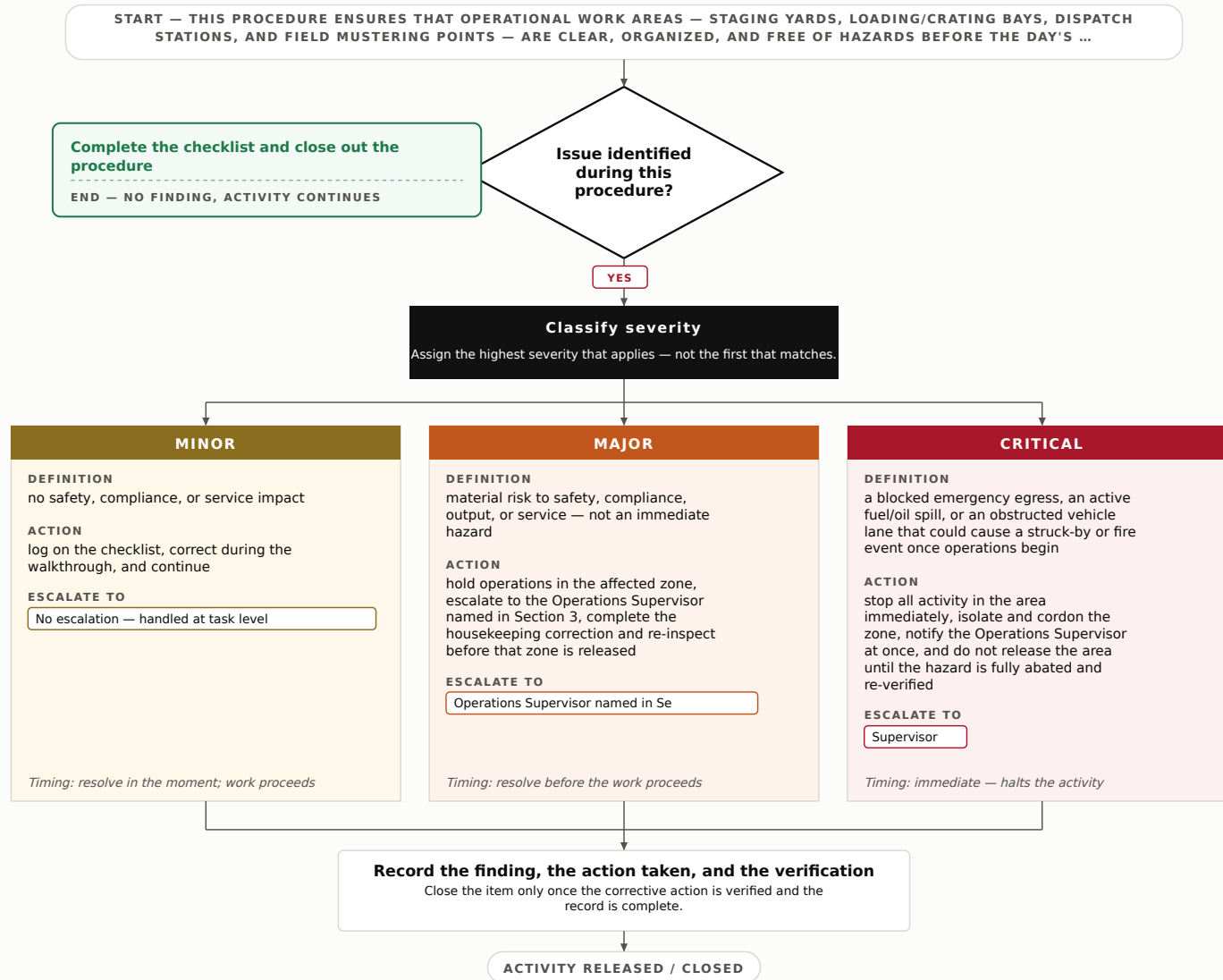


7. Step-by-Step Procedure

1. At shift start, Shift Lead assembles the crew, confirms today's operational plan (staging volumes, crating jobs, dispatch load-out), and assigns work zones.
2. Walk each active zone — staging lanes, crating/packing bays, dispatch station, and field mustering point — scanning for trip hazards, blocked aisles, spilled petroleum-based fluids, loose banding/strapping, and misplaced navigation or handling equipment.
3. Confirm travel and egress paths (vehicle lanes, pedestrian walkways, emergency exits) are clear to their marked width and unobstructed.
4. Verify staged materials and inbound parts (e.g., vehicle parts from 336390 suppliers, navigation units from 334511) are stowed in designated locations and not encroaching on aisles or work surfaces.
5. Confirm fluid spills or leaks (fuel, oil, lubricants from 324110 petroleum products) are contained and cleaned per Hazard Communication labeling; segregate contaminated absorbents for proper disposal.
6. Confirm firefighting equipment, spill kits, and first-aid stations are accessible, unblocked, and visibly present.
7. Direct any required housekeeping corrections and re-inspect the affected zone.
8. Record findings on the Inspection Checklist, note corrective actions taken, and obtain Operations Supervisor verification before releasing the area for operations.

8. Decision Tree

Decision Tree — Work Area Readiness & Housekeeping Inspection



READING THIS TREE

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- All assigned zones walked and signed off by the Shift Lead.
- Egress paths and vehicle lanes confirmed clear to marked width.
- All spills contained/cleaned and any labeled chemicals stowed per HazCom.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Aisles, walkways, and vehicle lanes clear to marked width		
Emergency exits and egress paths unobstructed		
Staged materials/parts stowed in designated locations		
No uncontained fuel/oil/lubricant spills; absorbents segregated		
Loose banding, strapping, and packing debris removed		
Spill kits, fire extinguishers, and first-aid stations accessible		
Handling/navigation equipment stowed and not blocking paths		

11. KPIs

- Pre-shift inspections completed on time: $\geq 98\%$ of operating days
- Zones released with zero open Critical findings: 100%
- Recurring housekeeping findings closed within one shift: $\geq 95\%$

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

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1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for TRANSPORT_SUPPORT.	Archetype Content Team

OD-005 — Operational Equipment Availability Check

Estimated completion time: 15-30 minutes per shift/dispatch period

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1. Purpose

To confirm that the vehicles, powered equipment, load-securement gear, navigation/communication devices, and packing tools required for the upcoming operating period are on hand, functional, and formally released for use — so the period's dispatched or scheduled work can begin without availability-driven delay.

2. Scope

Covers the count, presence-verification, and use-release status of all equipment and tools assigned to the period across facility-based and field-based service lines. Excludes equipment condition/inspection (see ED-003), preventive-maintenance status (see PM-024), and materials-handling-equipment pre-use checks (see WH-004); this procedure confirms availability and release only, not condition or PM currency.

3. Responsibilities

- Operations Supervisor — owns the period availability check, authorizes final release of the equipment roster, and resolves shortfalls.
- Dispatch/Yard Coordinator — verifies physical presence and staged location of vehicles, tools, and securement gear against the period roster.
- Equipment Custodian (Operator on shift) — confirms assigned tools/devices are in hand, functional at power-on, and reports any missing or unreleased item.

4. Required PPE & Lockout/Tagout

- Standard facility PPE: high-visibility vest, safety footwear, and gloves where handling securement gear or equipment; add eye protection where staging in an active yard.
- Not applicable — no hazardous energy is de-energized or serviced under this availability check. Any equipment found requiring service is routed per ED-003/PM-024 and not operated.

5. Regulatory References

- 49 CFR Part 393 (Parts and Accessories Necessary for Safe Operation, incl. §393.100–.136 cargo securement) — where the service line operates commercial motor vehicles or secures loads.
- 49 CFR Part 396 (Inspection, Repair, and Maintenance — availability of a serviceable, released vehicle prior to operation) — where CMVs are dispatched.
- 29 CFR 1910.132 (General PPE requirements) — applies to all members.

- Manufacturer operating specifications for navigation/communication devices and powered tools (e.g., winch or strapping-tool ratings) as the release basis where no federal standard governs.
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

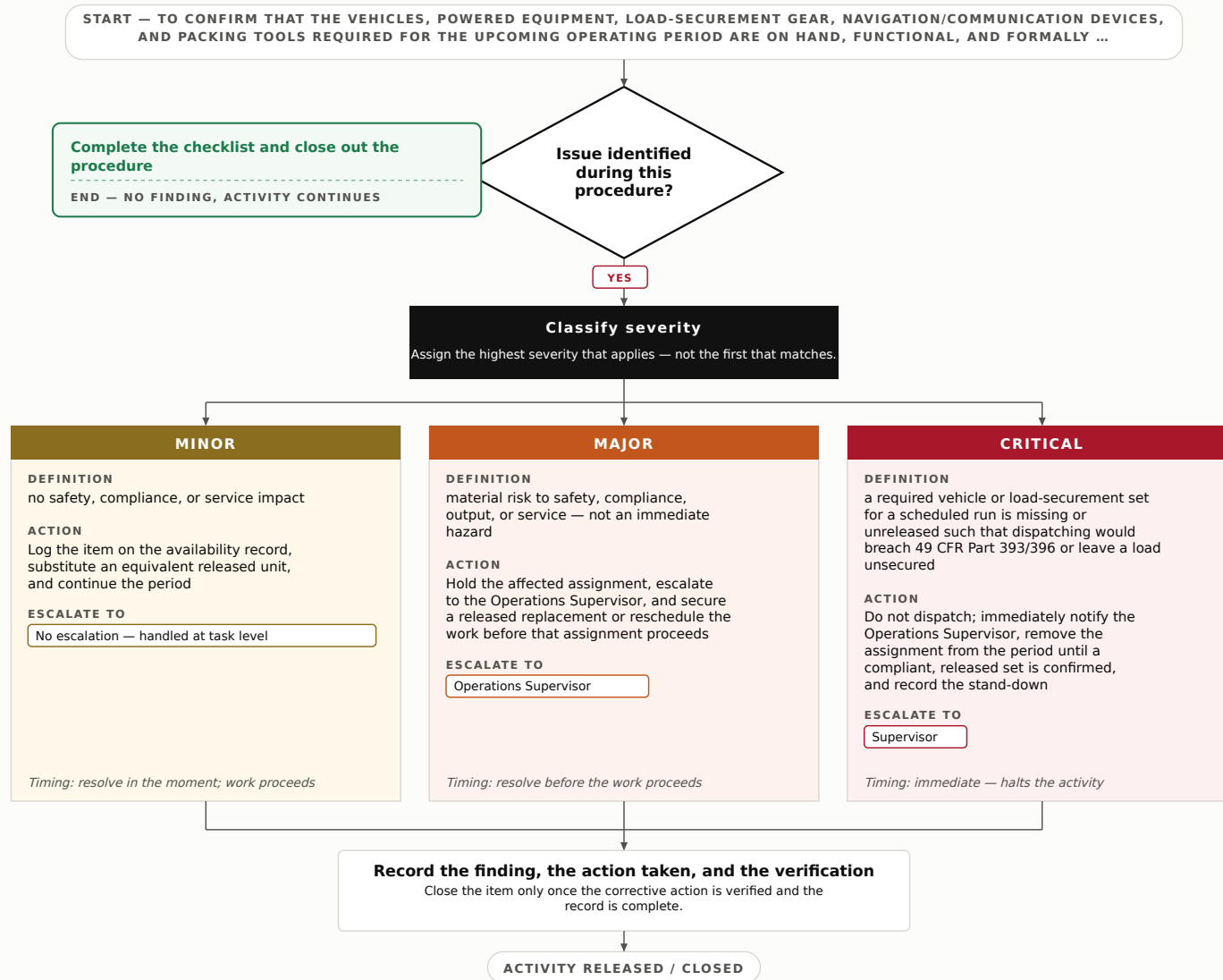
6. Process Flow



7. Step-by-Step Procedure

1. Pull the period equipment roster from the dispatch/work schedule, listing every vehicle, powered tool, securement item (straps, chains, binders, dollies), and navigation/comm device required.
2. Walk the staging area/yard and confirm each rostered item is physically present and staged at its assigned location; note quantities for consumable-adjacent securement gear.
3. Power on navigation and communication devices and confirm they boot and acquire signal; confirm powered tools and vehicle accessories energize (availability/function only — not a condition inspection per ED-003).
4. Verify each item carries a current release status (release tag, checkout entry, or system flag) indicating it is cleared for use and not held for PM (see PM-024) or condition hold (see ED-003).
5. Confirm consumable and replacement stock needed to keep equipment operable for the period (e.g., approved parts, fuel/fluids) is on hand; flag reorder needs to procurement.
6. Classify any missing, non-functional, or unreleased item per the Decision Tree in Section 8.
7. Resolve or substitute available items and update the roster to reflect the released set for the period.
8. Record the completed check, note all findings and resolutions, and obtain Operations Supervisor authorization to start the period.

8. Decision Tree

Decision Tree — Operational Equipment Availability Check**READING THIS TREE**■ **No finding**

Activity stands. Complete the checklist and continue.

■ **Minor**

Handled in place at task level; no escalation.

■ **Major**

Supervisory decision required before the next stage.

■ **Critical**

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every rostered item is accounted for as present or formally substituted before period start.
- All navigation/comm devices and powered tools confirmed to power on and function at availability level.
- Every released item carries a valid, current release status not overridden by an ED-003 or PM-024 hold.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Period equipment roster pulled and complete		
All rostered vehicles/equipment physically present & staged		
Securement gear (straps/chains/binders/dollies) counted to roster		
Navigation & communication devices power on and acquire signal		
Each item carries current use-release status (no active hold)		
Consumable/parts stock adequate for the period		
Supervisor authorization to start period obtained		

11. KPIs

- Period-start equipment availability: $\geq 98\%$ of rostered items present and released.
- Availability-driven dispatch delays: $\leq 2\%$ of scheduled assignments per period.
- Unresolved Critical availability findings at period start: 0.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

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1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for TRANSPORT_SUPPORT.	Archetype Content Team

Phase 2 — Demand intake

OD-006 — Customer Order / Work Request Intake

Estimated completion time: 10-25 minutes per request (routine); up to 45 minutes for multi-stop or hazardous/oversize jobs

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1. Purpose

To receive, verify, and log every incoming customer order, job, or service request into a single dispatch-ready record so that the correct equipment, crew, and materials can be assigned, and so that a complete, traceable intake exists for every job the operation performs.

2. Scope

Covers intake of all inbound requests — phone, radio, web, motor-club or broker portal, and walk-in — from first contact through creation of a logged, numbered work order ready for assignment. Excludes acceptance/capability review (whether the job can be accepted based on equipment, licensing, or service-area capability), which is covered under OD-007.

3. Responsibilities

- Intake / Dispatch Coordinator — answers the request, captures required fields, verifies caller/account details, and creates the numbered work order.
- Operations Supervisor — resolves incomplete or disputed intakes, approves priority/expedite flags, and owns escalations.
- Billing & Records Clerk — confirms account/payment authorization and files the intake record per retention policy.

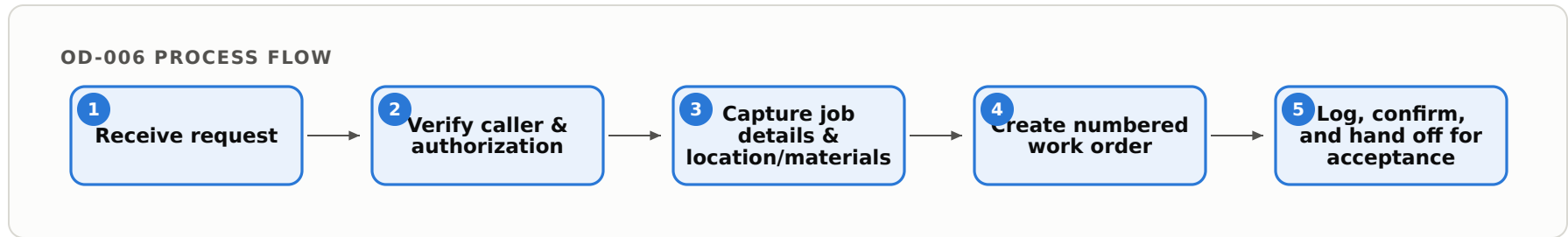
4. Required PPE & Lockout/Tagout

- Standard facility PPE for intake staff working at or near an active yard or dock (high-visibility vest and closed-toe footwear when leaving the office area); office-based intake requires none.
- Not applicable — no hazardous energy involved in the intake task itself.

5. Regulatory References

- 49 CFR Part 375 (Transportation of Household Goods — order/estimate documentation) and 49 CFR Parts 390–391 (FMCSA general operating and driver-qualification records) where the service line operates commercial motor vehicles; DOT/PHMSA 49 CFR Parts 171–173 for capturing hazardous-material descriptions at intake where applicable.
- FTC/State consumer-disclosure and telephone-solicitation rules governing quoted terms and recorded-line notices; applicable state motor-carrier / towing-authority and consumer-protection statutes.
- None uniquely sector-wide beyond these; internal Intake & Records Policy governs field completeness and record retention.
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

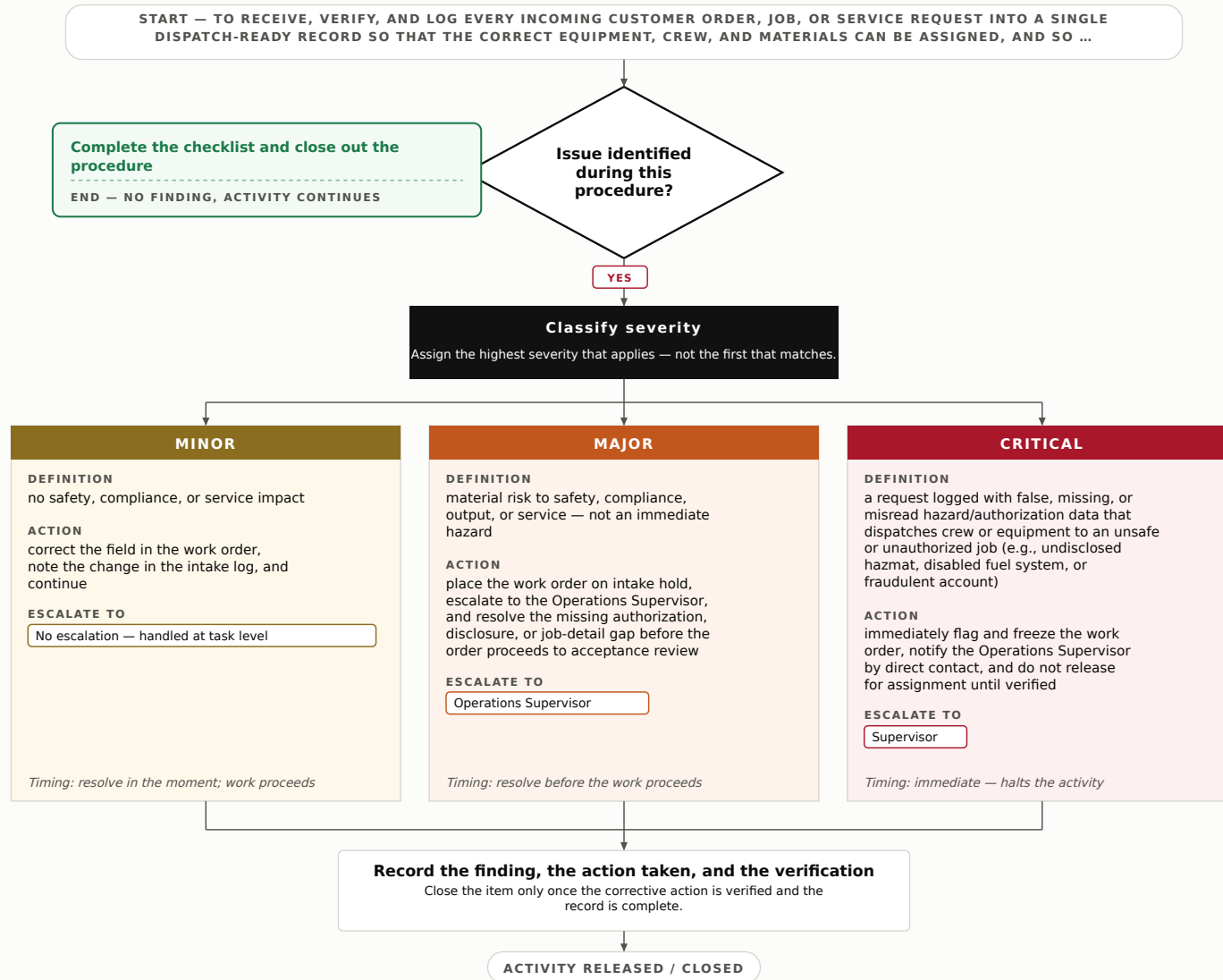
6. Process Flow



7. Step-by-Step Procedure

1. Answer the inbound request on the recorded line/portal, greet per script, and confirm the reporting party's name and callback number.
2. Identify the requestor type (retail customer, motor-club, broker, insurer, commercial account) and verify account or dispatch authorization against the account file or portal reference number.
3. Capture the service type and job details — origin and destination or work site, vehicle/cargo/crate description, weight/dimensions or class, and any oversize, disabled, or navigation-assisted routing needs.
4. Record hazard and special-handling flags (fuel/fluid leaks, hazmat placards, damaged fuel systems, restricted access) and any customer-supplied time constraints.
5. Assign a priority tier (routine, urgent, emergency/roadside) and enter requested date/time window.
6. Read back all captured fields to the requestor, confirm quoted disclosure terms and recorded-line consent, and correct any discrepancies.
7. Generate the numbered work order in the dispatch system and route it to acceptance/capability review per OD-007.
8. Document the intake — timestamp, coordinator ID, channel, and completed field set — and file the record with Billing & Records.

8. Decision Tree

Decision Tree — Customer Order / Work Request Intake**READING THIS TREE**

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- All mandatory intake fields (requestor, authorization, service type, location, hazard flags) present and read back before work-order creation.
- Recorded-line consent and quoted disclosure terms confirmed and noted.
- Work-order number generated and correctly routed to OD-007.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Requestor identity and callback number verified		
Account / dispatch authorization confirmed		
Service type, location(s), and cargo/vehicle detail captured		
Hazard / special-handling flags recorded		
Priority tier and time window assigned		
Disclosure terms and recorded-line consent noted		
Numbered work order created and routed		

11. KPIs

- Intake completeness (all mandatory fields on first save): $\geq 98\%$
- Average intake handling time: ≤ 15 minutes for routine requests
- Intake-error rate returned from acceptance review (OD-007): $\leq 2\%$

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for TRANSPORT_SUPPORT.	Archetype Content Team

OD-007 — Order Verification & Acceptance Review

Estimated completion time: 15-40 minutes per order

Provided for general informational and operational purposes as part of the Transport Support archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To confirm that every incoming service request is within the operation's declared scope, matches a workable specification, is supportable by available equipment and personnel capacity, and carries agreed terms before the operation commits to it — protecting both service quality and liability exposure.

2. Scope

Covers verification and formal acceptance (or decline) of customer service orders across the archetype's common service lines — road-transport support, motor vehicle towing/recovery, and packing/crating/preparation of goods for transport. Excludes order logging, which is covered under OD-006, and scheduling/dispatch, which is covered under OD-008.

3. Responsibilities

- Operations Supervisor — reviews scope, specification, and terms; makes the final accept/decline decision and signs off.
- Intake Coordinator — collects and confirms order details, service-address/route data, and stated cargo or vehicle characteristics from the customer.
- Capacity/Equipment Lead — confirms that suitable equipment (tow/recovery units, load-handling gear, or packing/crating materials) and qualified personnel capacity exist to perform the work as specified.

4. Required PPE & Lockout/Tagout

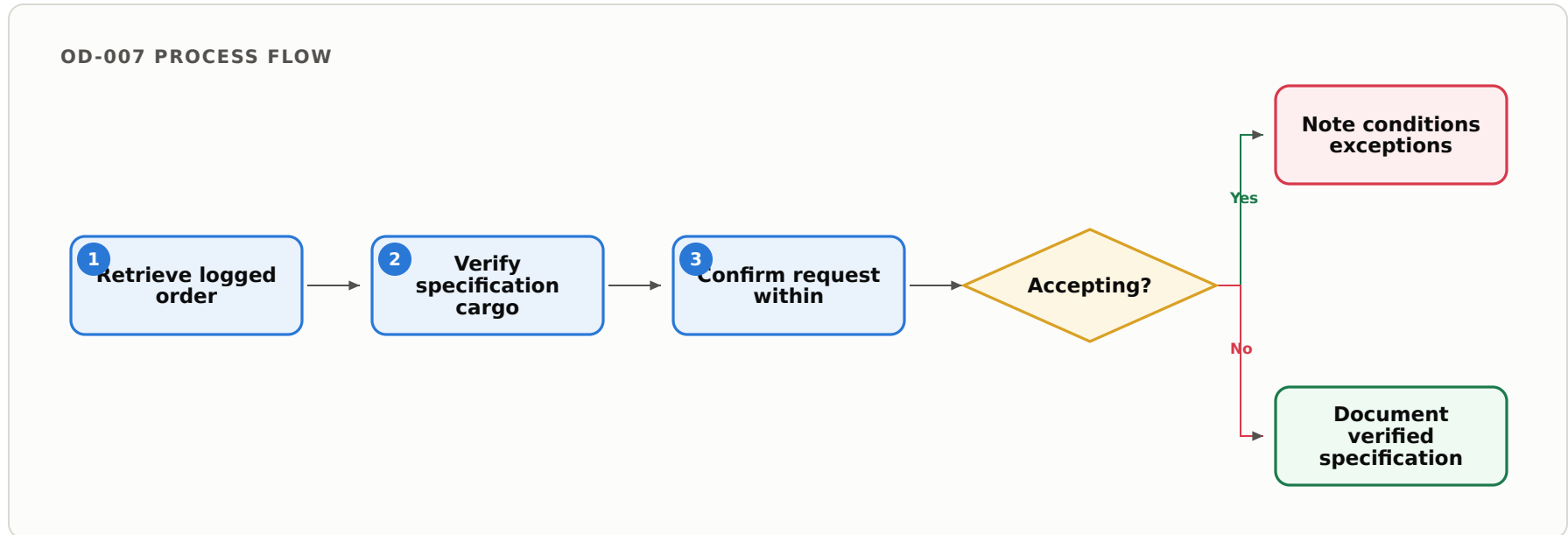
- Standard facility/office PPE for the review activity itself; where verification requires a physical walk-around or on-site cargo/vehicle assessment, high-visibility apparel and appropriate footwear per site rules.
- Not applicable — this procedure involves no hazardous energy; any energized/loaded equipment assessed during verification remains under its own LOTO/securement procedure.

5. Regulatory References

- 49 CFR Part 390-393 (Federal Motor Carrier Safety Regulations — general applicability, marking, and vehicle condition) where the service line operates commercial motor vehicles.
- 49 CFR Part 172 (Hazardous Materials — communication/shipping requirements) where any order involves hazardous materials handling, packing, or transport support.

- 29 CFR 1910 (OSHA General Industry — general duty, materials handling, PPE) as the baseline for all members.
- None additional sector-specific to acceptance review itself; internal contract-review and acceptance policy applies (e.g., state motor carrier/tow licensing conditions as an example where applicable).
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

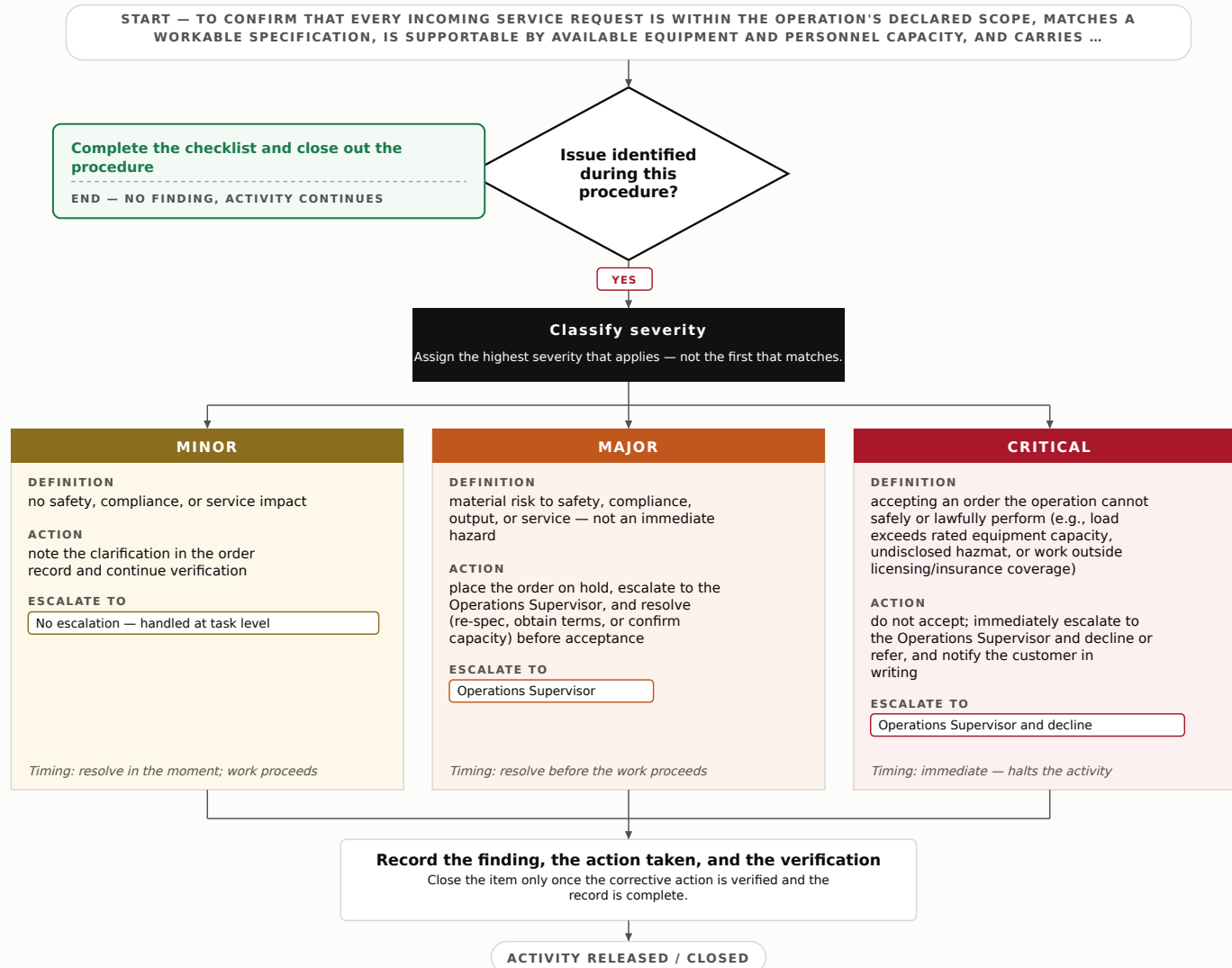


7. Step-by-Step Procedure

1. Retrieve the logged order record (per OD-006) and confirm the customer, service line requested, and stated location/route or origin-destination.
2. Verify the specification: cargo or vehicle type, weight, dimensions, quantity, special handling (hazmat, oversize, fragile, disabled/damaged vehicle), and any access constraints.
3. Confirm the request is within the operation's declared scope and licensing; flag any out-of-scope or restricted service (e.g., hazmat, oversize) for specialized review.
4. Confirm equipment capability with the Capacity/Equipment Lead — rated capacity, correct rigging/load-handling gear, or required packing/crating materials are available and serviceable.
5. Confirm personnel capability — qualified/credentialed operators are available for the service line and location conditions.
6. Confirm commercial terms: pricing basis, liability/damage limits, insurance/certificate needs, cancellation and wait-time terms, and customer authorization.

7. Make the accept/decline decision; if accepting, note any conditions or exceptions; if declining, record the reason and notify the customer.
8. Document the verified specification, capability confirmation, terms, and decision in the order record and route accepted orders to scheduling (OD-008).

8. Decision Tree

Decision Tree — Order Verification & Acceptance Review**READING THIS TREE**

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Specification confirmed against a documented source (customer statement or on-site assessment), not assumed.
- Equipment/personnel capability confirmed by the Capacity/Equipment Lead before acceptance.
- Terms and liability limits acknowledged by the customer before commitment.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Order record retrieved and customer/service line confirmed		
Cargo/vehicle specification (type, weight, dimensions, special handling) verified		
Request confirmed within declared scope and licensing		
Equipment capacity and required materials confirmed available/serviceable		
Qualified personnel available for the service line and conditions		
Commercial terms, liability limits, and authorization confirmed		
Accept/decline decision recorded with any conditions or reasons		

11. KPIs

- Orders verified before acceptance: 100%
- Accepted orders later found out-of-scope or over-capacity: $\leq 2\%$
- Verification completed within target window (per order): $\geq 95\%$ within 40 minutes

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for TRANSPORT_SUPPORT.	Archetype Content Team

OD-008 — Job Scheduling & Sequencing

Estimated completion time: 20–45 minutes per scheduling cycle

Provided for general informational and operational purposes as part of the Transport Support archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To place accepted transport-support work — service calls, packing/crating jobs, and coordinated support runs — into the operating schedule in a sequence that honors customer due dates, contractual priority, and regulatory duty-time limits, so that committed work is delivered on time without overcommitting the operating window.

2. Scope

Covers the ordering and time-slotting of already-accepted jobs into the daily/weekly operating schedule, including priority classification, due-date sequencing, and slot confirmation. Excludes assignment of specific crews, drivers, or vehicles to those slots, which is covered under OD-009, and equipment maintenance windows, which are covered under PM-008.

3. Responsibilities

- Operations Scheduler — builds the sequence, applies priority and due-date rules, and confirms achievable slots against the operating window.
- Dispatch/Operations Supervisor — approves the sequence, arbitrates priority conflicts, and authorizes exceptions or expedites.
- Intake Coordinator — supplies validated job records (due dates, service type, customer priority tier) into the schedule for sequencing.

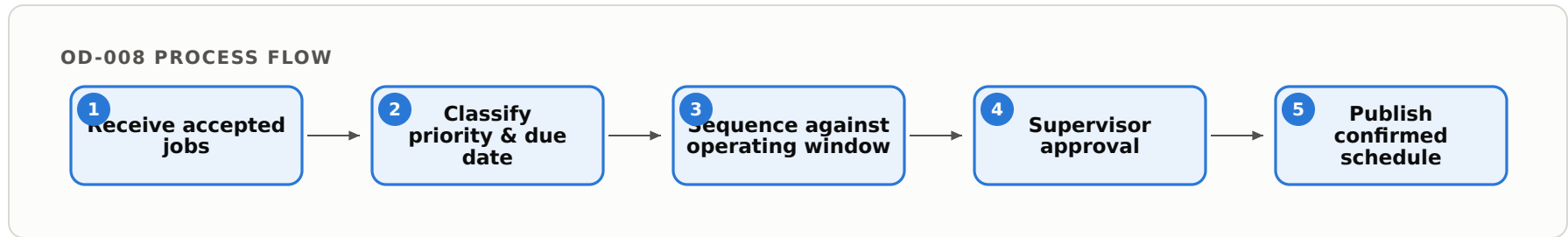
4. Required PPE & Lockout/Tagout

- Standard facility PPE if the scheduler enters operational areas (high-visibility vest, closed-toe footwear); none required for desk-based scheduling.
- Not applicable — no hazardous energy involved in this task.

5. Regulatory References

- 49 CFR Part 395 (Hours of Service) — where the service line operates commercial motor vehicles, sequencing must not schedule work that exceeds driver duty limits.
- 49 CFR Part 390 (Federal Motor Carrier Safety Regulations, general applicability) — where operations fall under FMCSA jurisdiction.
- 29 CFR 1910 (OSHA General Duty / General Industry) — applies to all members for the safe conduct of scheduled operations.
- None sector-specific beyond the above; internal dispatch-priority policy applies for tier definitions.
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

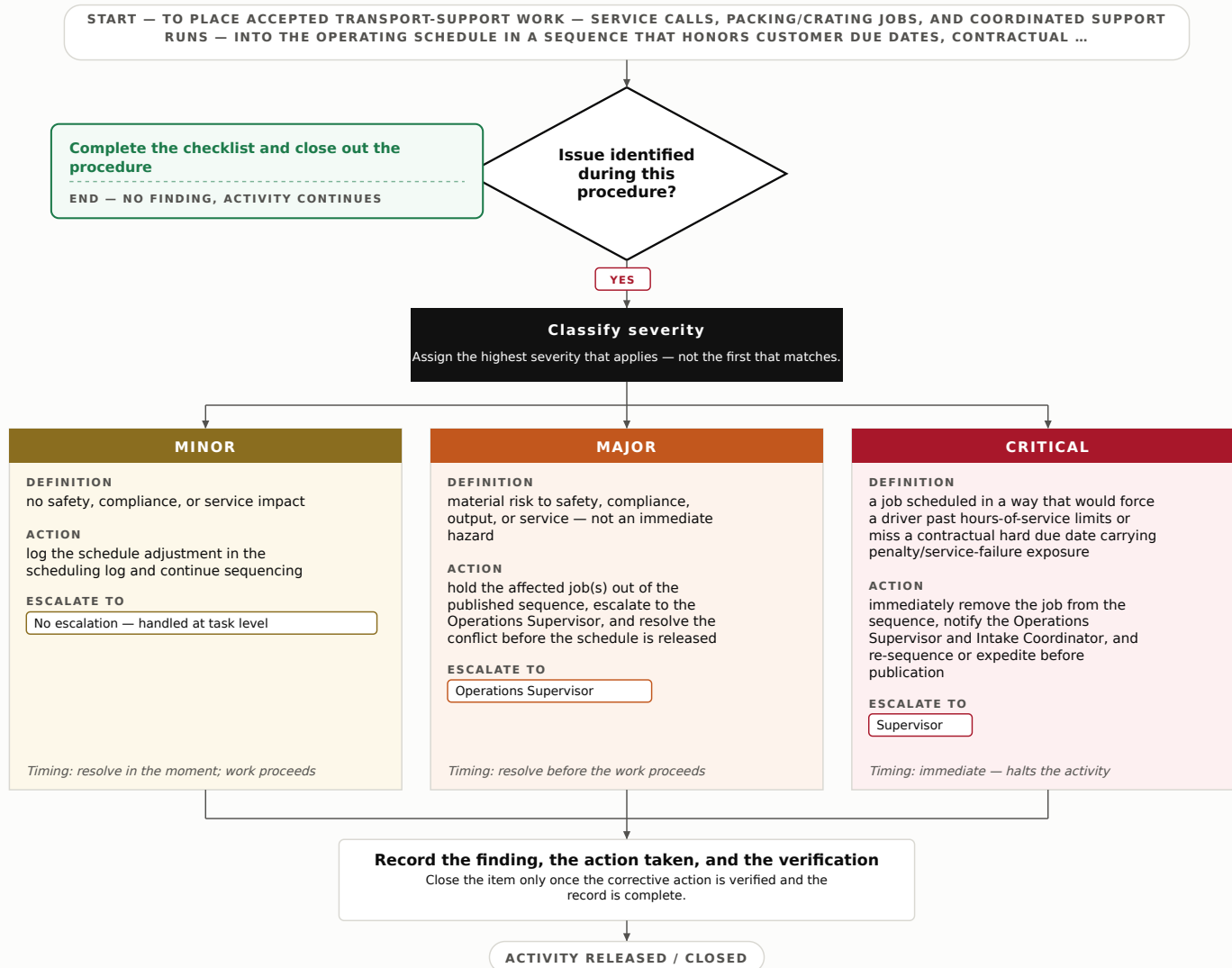


7. Step-by-Step Procedure

1. Pull the list of accepted jobs from the intake record, confirming each has a validated due date, service type, and customer priority tier from the Intake Coordinator.
2. Classify each job by priority tier (contractual/urgent, standard, deferrable) and note any hard due-date or time-window constraints.
3. Map available operating capacity for the scheduling horizon, respecting duty-time limits where the service line operates commercial motor vehicles (per 49 CFR Part 395) and blocking out maintenance windows already reserved under PM-008.
4. Sequence jobs earliest-due-first within each priority tier, then interleave higher-priority work ahead of lower-priority work where windows overlap.
5. Check for over-commitment: verify the sequence does not exceed the operating window or push any hard-due job past its deadline; flag conflicts.
6. Resolve conflicts by rescheduling deferrable work, requesting an expedite authorization, or escalating to the Operations Supervisor.
7. Submit the proposed sequence to the Operations Supervisor for approval.
8. Publish the confirmed schedule and record the final sequence, timestamps, and any exceptions in the scheduling log.

8. Decision Tree

Decision Tree — Job Scheduling & Sequencing



READING THIS TREE

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every accepted job carries a validated due date and priority tier before sequencing.
- No scheduled job exceeds duty-time limits where commercial motor vehicles are operated.
- Published sequence honors all hard due dates and contractual priority tiers.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
All accepted jobs have validated due dates and priority tiers		
Sequence orders hard-due jobs before their deadlines		
Higher-priority tiers sequenced ahead of lower where windows overlap		
Duty-time limits respected where CMVs are operated		
Maintenance windows (per PM-008) excluded from capacity		
Over-commitment conflicts flagged and resolved		
Confirmed schedule published and logged with timestamps		

11. KPIs

- On-time due-date sequencing: $\geq 98\%$ of jobs sequenced to meet committed due date.
- Schedule publication timeliness: confirmed sequence published ≥ 1 operating period ahead of execution, $\geq 95\%$ of cycles.
- Priority-conflict resolution: 100% of flagged conflicts resolved or escalated before publication.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for TRANSPORT_SUPPORT.	Archetype Content Team

OD-009 — Resource & Capacity Allocation

Estimated completion time: 30-60 minutes per shift or dispatch cycle

Provided for general informational and operational purposes as part of the Transport Support archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

This procedure establishes how the Operations team assigns qualified personnel, serviceable equipment, and physical or staging space to scheduled work, and confirms that the assigned capacity is real and available before work is committed. It prevents overcommitment, double-booking, and dispatch of resources that are out of service or out of certification.

2. Scope

Covers the matching of scheduled jobs to available operators, wreckers/recovery units or handling equipment, packing/crating materials and staging space, and the verification that each allocated resource is physically present, serviceable, and correctly rated for the assigned work. Excludes staffing presence and attendance confirmation, which is covered under OD-003, and job sequence and schedule ordering, which is covered under OD-008.

3. Responsibilities

- Operations Dispatcher/Coordinator — matches scheduled work to available operators, equipment, and space; records each allocation and flags shortfalls.
- Operations Supervisor — confirms capacity is real, approves resource commitments and overrides, and resolves contention between competing jobs.
- Equipment/Yard Custodian — verifies serviceability, fuel/consumable levels, and location of assigned units and staging space, and reports out-of-service resources.

4. Required PPE & Lockout/Tagout

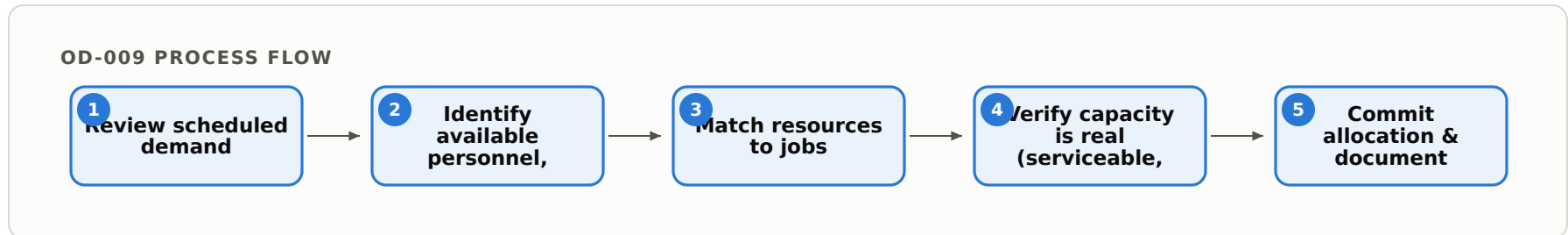
- Standard facility PPE for any yard or equipment walk-down performed during verification: high-visibility vest, safety footwear, and gloves where the service line operates vehicles or handling equipment.
- Not applicable — this is a planning and allocation task with no hazardous-energy work. Any physical servicing of a unit found unfit follows the maintenance LOTO procedure, not this module.

5. Regulatory References

- 29 CFR 1910 (OSHA General Duty and general industry standards) for safe assignment of equipment and workspace across all members.

- 49 CFR Parts 390–396 (FMCSA) where the service line operates commercial motor vehicles — driver qualification and vehicle serviceability must be current before a unit is allocated (e.g., towing/recovery fleets).
- DOT Hazardous Materials Regulations, 49 CFR Parts 171–180, where allocated packing, crating, or handling capacity involves regulated commodities.
- None additional sector-specific; internal capacity and dispatch policy applies where the above do not.
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

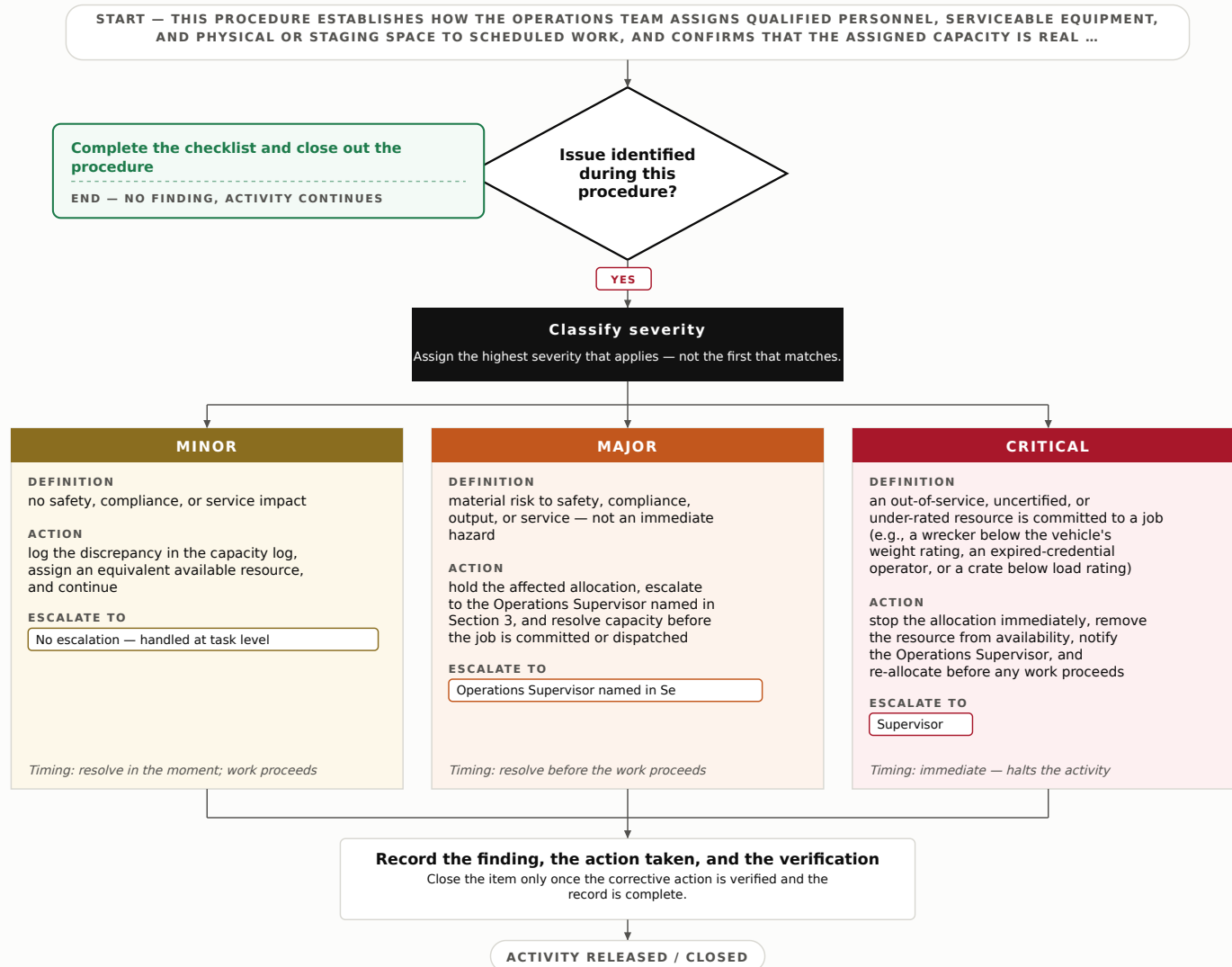


7. Step-by-Step Procedure

1. Pull the confirmed job list for the cycle (from OD-008 sequence) and list every resource type each job requires: operator qualification, equipment class/rating, consumables, and staging space.
2. Compile current availability — on-shift operators with valid credentials, units marked in service, and open staging/dock or yard space.
3. Match each job to the lowest-adequate resource that meets its rating (e.g., wrecker capacity vs. vehicle GVWR, crate/pallet rating vs. load weight, navigation-equipped unit vs. route need).
4. Verify equipment is real capacity: confirm the assigned unit is physically present, fueled/charged, inspection current, and not flagged out of service by the Equipment/Yard Custodian.
5. Verify space and materials: confirm staging/dock space is unoccupied for the window and that required packing/crating materials and parts are on hand and not committed elsewhere.
6. Resolve contention: where two jobs claim the same resource, escalate to the Operations Supervisor for priority decision; never double-book a single unit or operator.
7. Commit the allocation only after every resource is confirmed real; issue assignments and note any conditional or backup resource.
8. Document each allocation, verification result, override, and shortfall in the dispatch/capacity log with time, initials, and job reference.

8. Decision Tree

Decision Tree — Resource & Capacity Allocation



READING THIS TREE

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every scheduled job has a named, qualified operator and a serviceable, correctly rated resource before commit.
- No operator, unit, or space is committed to more than one job in the same window.
- Every allocated resource is confirmed physically present and serviceable, not assumed.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
All scheduled jobs have a matched operator, equipment, and space		
Assigned equipment class/rating meets each job's load or route requirement		
Each allocated unit confirmed in service and present (Custodian verified)		
Operator credentials current for assigned work		
No double-booking of any operator, unit, or staging space		
Required packing/crating materials and parts on hand and uncommitted		
All allocations, overrides, and shortfalls logged with time and initials		

11. KPIs

- Allocation accuracy (jobs dispatched with correct resource, no re-allocation): $\geq 98\%$
- Capacity verification completed before commit: 100% of jobs
- Double-booking incidents per cycle: 0

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for TRANSPORT_SUPPORT.	Archetype Content Team

OD-010 — Incoming Material / Supply Verification

Estimated completion time: 20-45 minutes per inbound delivery

Provided for general informational and operational purposes as part of the Transport Support archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

This procedure establishes how inbound materials and supplies — replacement vehicle parts, petroleum-based fluids, packing and crating stock, and navigation/electronic units — are verified against the purchase order, expected quantity, and delivered condition so that only correct, undamaged materials enter the operation. Accurate verification prevents wrong-part installs, fluid contamination, and service delays across every Transport Support service line.

2. Scope

Covers the receiving-point verification of all inbound materials and supplies at a Transport Support facility or staging yard: matching to the purchase order, counting quantity, and inspecting external/delivery condition. Excludes spec-conformance testing, which is covered under QC-003; putaway, which is covered under WH-006; and dock count reconciliation, which is covered under SH-008.

3. Responsibilities

- Receiving Operator — physically inspects each delivery, matches items to the purchase order, counts quantity, records condition, and initiates a discrepancy hold.
- Operations Supervisor — reviews holds, authorizes acceptance or refusal, and coordinates supplier resolution.
- Inventory/Materials Coordinator — maintains the purchase-order records, updates received quantities, and files verification documentation.

4. Required PPE & Lockout/Tagout

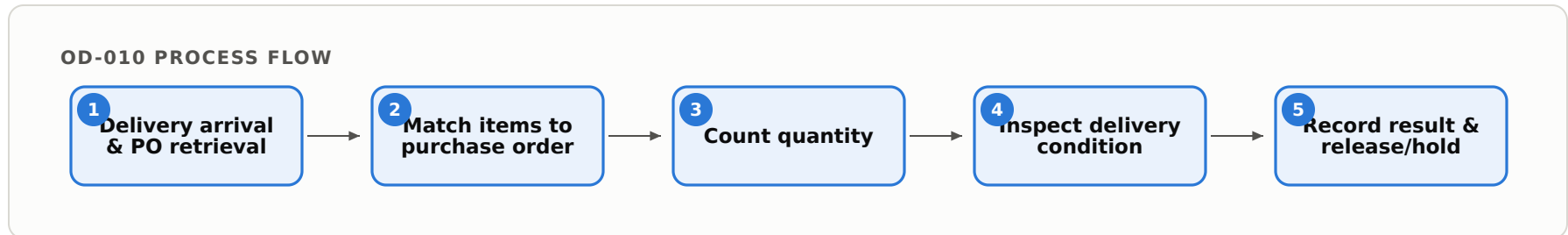
- Standard facility PPE: cut-resistant gloves, safety footwear, high-visibility vest where the receiving point adjoins a vehicle-movement or field-staging area; chemical-resistant gloves and eye protection when handling petroleum-based fluid containers.
- Not applicable — no hazardous energy is controlled during verification. Do not connect, energize, or road-test navigation/electronic units at receiving; that work occurs downstream.

5. Regulatory References

- 29 CFR 1910.176 (materials handling and storage — safe receiving/handling of goods)
- 29 CFR 1910.1200 (Hazard Communication — Safety Data Sheets required for petroleum-based fluids and chemical supplies received)
- 49 CFR 171-172 (DOT Hazardous Materials — shipping papers/markings verification where inbound fluids or aerosols are received as regulated hazmat)

- Internal Materials Acceptance Policy governs any item not covered by a sector-specific standard.
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

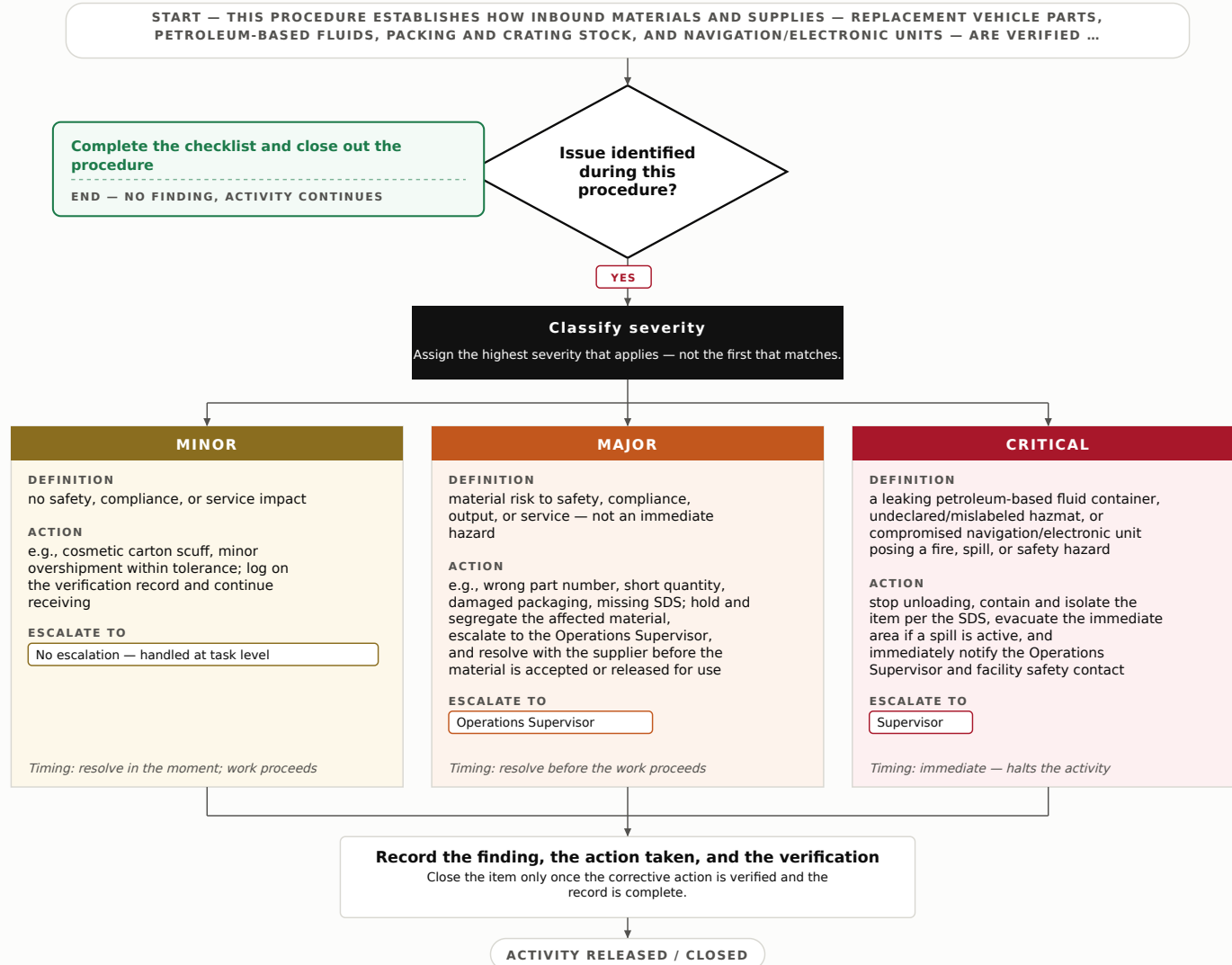


7. Step-by-Step Procedure

1. Retrieve the open purchase order for the arriving delivery and confirm the supplier name matches the shipping documents (e.g., parts from Motor Vehicle Parts Manufacturing, fluids from Petroleum Refineries, navigation units from Navigation System Manufacturing).
2. Verify shipping papers accompany any regulated fluids or hazmat items and that Safety Data Sheets are present or on file per HazCom.
3. Match each line item — part number, fluid grade/spec, unit model, packing/crating stock type — against the purchase order; flag any substitution or unlisted item.
4. Count received quantity against the ordered quantity for each line; record unit of measure exactly as ordered (each, case, drum, pallet).
5. Inspect external/delivery condition: crushed cartons, leaking or dented fluid containers, wet or torn packing stock, cracked navigation-unit housings, or broken seals.
6. Confirm identity labels, lot/serial markings, and expiry (for fluids) are legible; note any illegible or missing marking.
7. Classify any issue per the Decision Tree (Section 8) and place discrepant material on hold, physically segregated from accepted stock.
8. Record acceptance, quantity received, and condition notes on the verification record, sign, and pass documentation to the Inventory/Materials Coordinator; hand off spec-conformance testing to QC-003 where required.

8. Decision Tree

Decision Tree — Incoming Material / Supply Verification



READING THIS TREE

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Purchase order matched line-by-line before any acceptance is recorded.
- Quantity counted and reconciled to ordered units before signature.
- Condition and hazmat documentation (SDS/shipping papers) verified for all regulated items.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Supplier and PO number match shipping documents		
Each line item matches ordered part/grade/model		
Received quantity equals ordered quantity (correct units)		
Packaging, containers, and packing stock undamaged		
Fluid containers sealed, unexpired, and non-leaking		
SDS / hazmat shipping papers present for regulated items		
Identity labels and lot/serial markings legible		

11. KPIs

- Verification completed within 45 minutes of delivery arrival — $\geq 95\%$ of deliveries.
- Receiving discrepancies caught at verification (not downstream) — $\geq 98\%$.
- Accepted lines later returned for wrong-item/condition error — $\leq 1\%$.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for TRANSPORT_SUPPORT.	Archetype Content Team

Phase 3 — Execution

OD-011 — Standard Work Execution & Process Adherence

Estimated completion time: 20-45 minutes per job/work order

Provided for general informational and operational purposes as part of the Transport Support archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To ensure every transport-support job — whether a vehicle recovery/tow, a road-service call, a packing/crating order, or a staging/dispatch task — is performed to the documented standard method so that output is consistent, deviations are caught early, and each job can be reproduced and audited.

2. Scope

Covers execution of assigned work orders against the defined standard method, and the identification, classification, and logging of deviations from that method across all TRANSPORT_SUPPORT service lines. Excludes in-process quality/spec conformance checks (covered under QC-007) and the safe-work method itself (covered under SD-005).

3. Responsibilities

- Operations Lead — assigns work orders, confirms the current standard-method sheet is in effect, and dispositions escalated deviations.
- Field/Service Operator — performs the work to the documented method, self-verifies each stage, and records any deviation as it occurs.
- Quality/Compliance Coordinator — reviews deviation logs, tracks corrective actions to closure, and maintains the controlled method sheets.

4. Required PPE & Lockout/Tagout

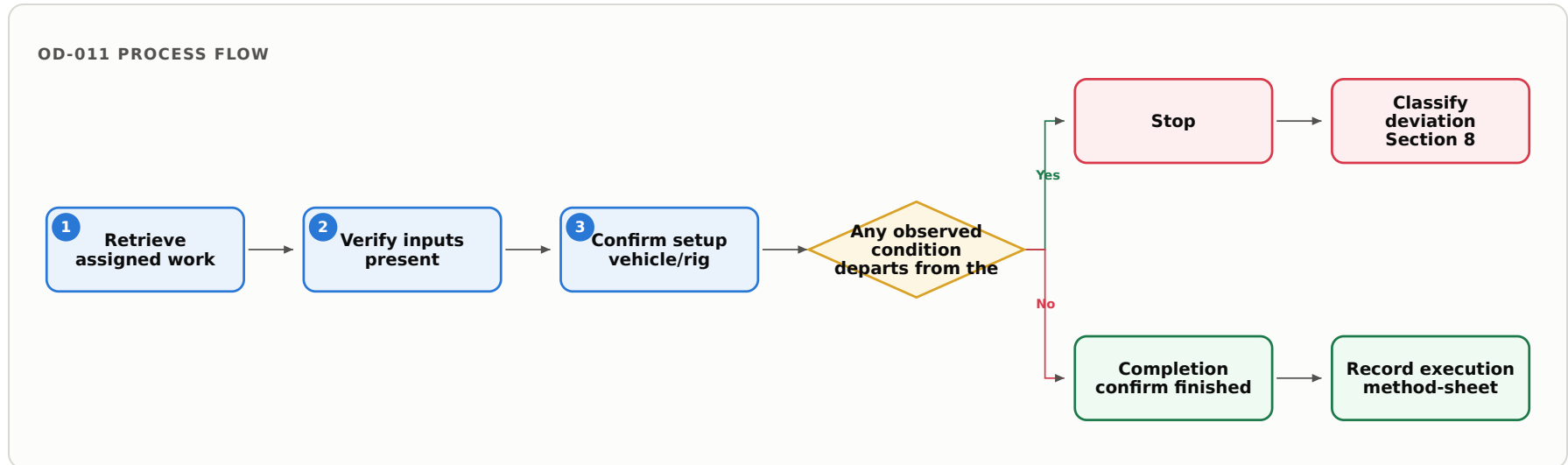
- Standard facility/field PPE: hi-visibility apparel, safety footwear, gloves, and eye protection; add task-specific PPE per the method sheet where the service line operates vehicles or handles loads.
- Lockout/Tagout: Applicable only where the service line services powered equipment or energized units — isolate per SD-005 before method execution begins. Not applicable to clerical staging/dispatch tasks.

5. Regulatory References

- 29 CFR 1910 (OSHA General Industry — general duty, PPE, and recordkeeping applicable to all members).
- 29 CFR 1904 (OSHA recording and reporting of occupational injuries/illnesses).
- 49 CFR 390-397 (FMCSA — general applicability to motor-carrier and transportation-support operations, including cargo securement 49 CFR 393 where loads are handled; e.g., towing recovery falls under these where a CMV is operated).
- Internal Standard-Method Control Policy (controlled method sheets, revision control, deviation log).

- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

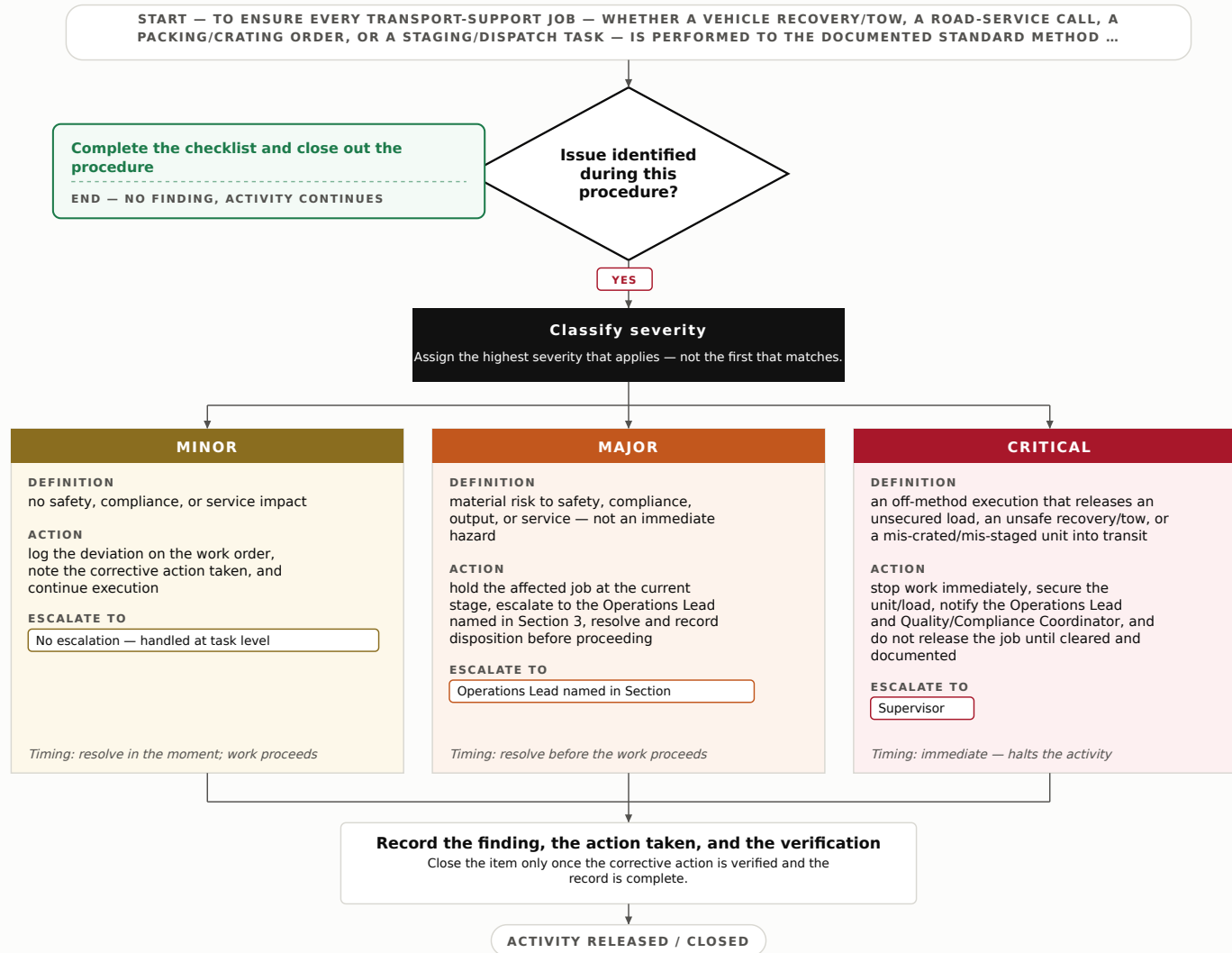
6. Process Flow



7. Step-by-Step Procedure

1. Retrieve the assigned work order and confirm the controlled standard-method sheet matches the current revision for that service line.
2. Verify inputs are present and correct — recovered/received unit, securement gear, crating/packing materials, navigation/routing data, and any 336390/324110-sourced parts or consumables required by the method.
3. Confirm the setup (vehicle/rig positioning, staging area, or crate/pack station) is arranged exactly as the method sheet specifies.
4. Execute the defined step sequence in order; do not skip, reorder, or substitute steps without a recorded deviation.
5. At each stage boundary, self-verify the work matches the method sheet's defined state before advancing.
6. If any observed condition departs from the method, stop, classify the deviation per Section 8, and record it in the deviation log.
7. On completion, confirm the finished job matches the method-defined end state and hand off per the outbound method (e.g., transfer to 423860 Transportation Equipment Wholesalers channel where the job supports equipment distribution).
8. Record execution: method-sheet revision used, operator, timestamps, and any deviations with disposition; file to the job record.

8. Decision Tree

Decision Tree — Standard Work Execution & Process Adherence**READING THIS TREE**■ **No finding**

Activity stands. Complete the checklist and continue.

■ **Minor**

Handled in place at task level; no escalation.

■ **Major**

Supervisory decision required before the next stage.

■ **Critical**

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Correct and current method-sheet revision confirmed before setup.
- Step sequence executed in order with stage self-verification recorded.
- All deviations classified, logged, and dispositioned.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Work order matches current method-sheet revision		
Required inputs/materials verified present and correct		
Setup/staging arranged per method sheet		
Step sequence followed without unrecorded substitutions		
Stage self-verifications recorded		
All deviations logged and classified		
Finished job matches method-defined end state		

11. KPIs

- Method-adherence rate (jobs executed with no unrecorded deviation): $\geq 98\%$
- Deviation log completeness (deviations recorded vs. found on audit): 100%
- Unresolved Critical deviations at closeout: 0

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for TRANSPORT_SUPPORT.	Archetype Content Team

OD-012 — Work-in-Progress Tracking & Status Update

Estimated completion time: 10-20 minutes per status cycle; continuous across the operating shift

Provided for general informational and operational purposes as part of the Transport Support archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

This procedure ensures the current status of every active job — tow, roadside assist, packing/crating order, or transportation support task — is recorded promptly and remains visible to Operations so that jobs are neither lost nor stalled. It gives dispatch and field or floor staff a shared, up-to-date view of work in progress.

2. Scope

Covers logging, updating, and displaying the live status of all active jobs from acceptance through service turnover, including status codes, timestamps, and location/stage of each job. Excludes throughput measurement, which is covered under OD-014, and quality-of-service data capture, which is covered under QC-027.

3. Responsibilities

- Operations Supervisor — owns the WIP board/system, verifies accuracy at shift start and end, resolves stalled or unclaimed jobs.
- Dispatch Coordinator — creates each job record, assigns it, and enters status changes as they occur or as reported.
- Field/Floor Operator — reports status transitions (en route, on scene/in process, complete) for their assigned jobs in real time by the approved channel.

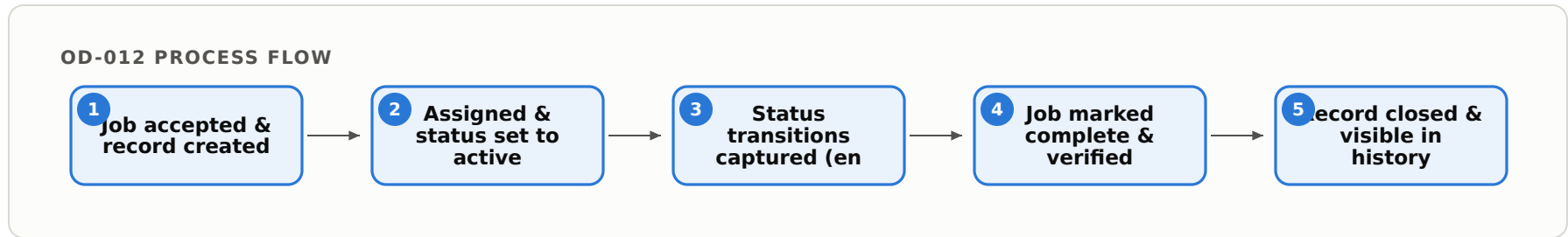
4. Required PPE & Lockout/Tagout

- Standard facility PPE where status updates are made from a work area (high-visibility vest and footwear where the service line operates vehicles or a yard); minimal PPE for desk-based dispatch entry.
- Not applicable — no hazardous energy involved in this recordkeeping task.

5. Regulatory References

- None sector-specific to WIP status recording itself; internal dispatch/records policy applies. Adjacent obligations that may govern the underlying records include DOT/FMCSA hours-of-service and dispatch records where the service line operates commercial motor vehicles (e.g., 49 CFR Part 395), and general business-records retention under applicable state law. Electronic tracking or telematics data (from navigation/GPS systems) must follow the operator's data-handling policy. Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

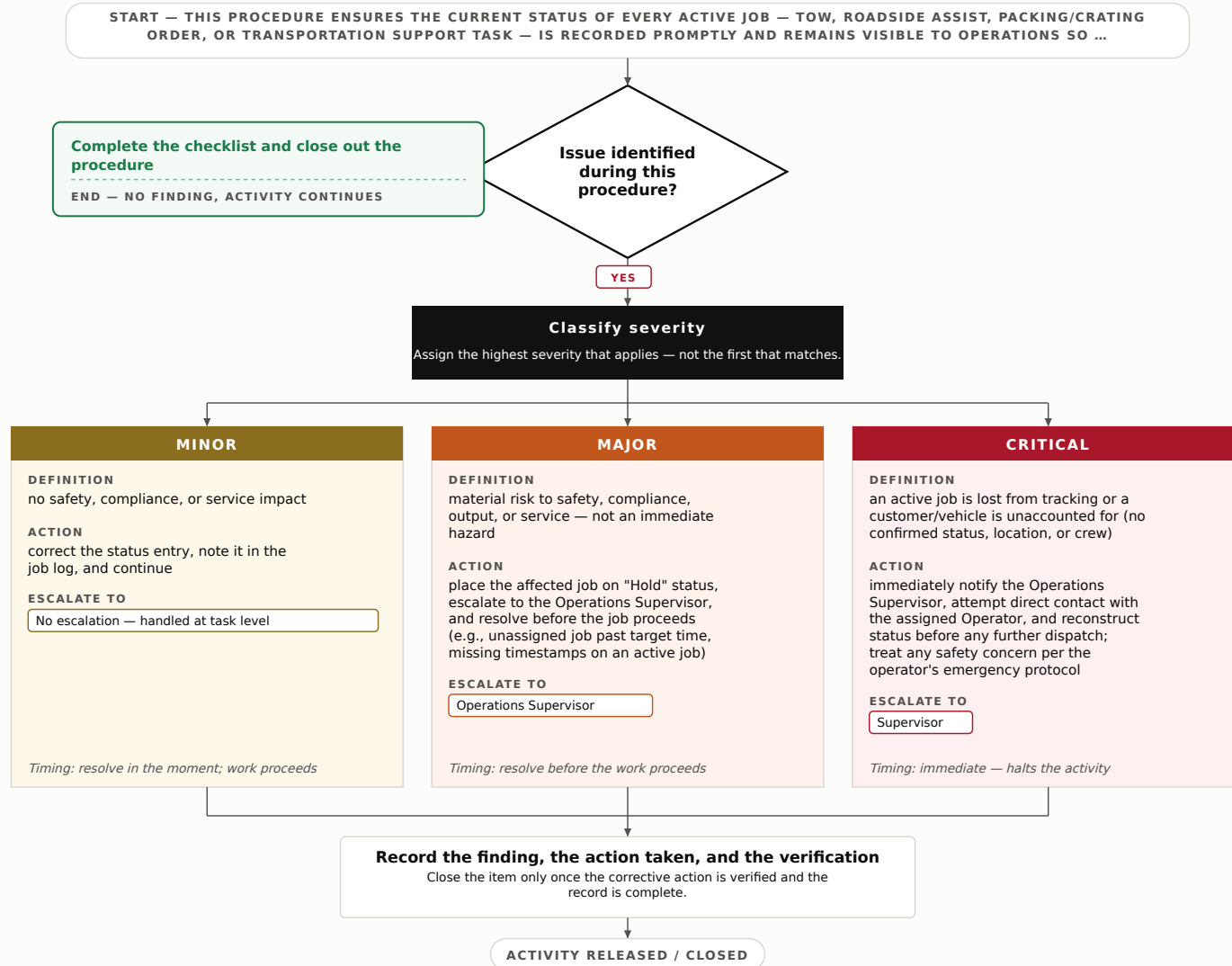


7. Step-by-Step Procedure

1. On job acceptance, Dispatch creates a WIP record with a unique job ID, customer/reference, service type, and target time.
2. Assign the job to a Field/Floor Operator (or crew/lane) and set status to "Active — Assigned."
3. Operator confirms receipt and updates status to "En route" or "In process" with a timestamp via the approved channel.
4. Capture each transition (arrived/on scene, staging, packing, loaded, delayed/hold) as it happens; note reason codes for any hold.
5. Ensure every active job is visible on the live WIP board/screen; no job should sit without a status update beyond the defined interval (e.g., 30 minutes).
6. On completion, Operator reports "Complete"; Dispatch confirms all fields are populated and moves the job to "Closed."
7. Operations Supervisor reviews the board at shift start and end for stalled, unassigned, or overdue jobs and reconciles discrepancies.
8. Record the reconciliation, any status corrections, and the shift-close snapshot in the job log.

8. Decision Tree

Decision Tree — Work-in-Progress Tracking & Status Update



READING THIS TREE

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every accepted job has a record with a unique ID within minutes of acceptance.
- No active job exceeds the defined update interval without a fresh status.
- All completed jobs are confirmed and closed with full fields before end of shift.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Every active job has a unique ID and assigned owner		
All active jobs show a current status and timestamp		
No job exceeds the update interval without refresh		
Hold/delay reasons are coded and logged		
Completed jobs verified and closed with full fields		
WIP board/screen matches actual field/floor state		
Shift-close snapshot recorded		

11. KPIs

- Active jobs with a current status within the update interval — $\geq 98\%$.
- Jobs logged within 5 minutes of acceptance — $\geq 95\%$.
- Unassigned or "lost" jobs at shift close — 0.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for TRANSPORT_SUPPORT.	Archetype Content Team

OD-013 — Operational Handoff Between Work Stages

Estimated completion time: 15-30 minutes per handoff event

Provided for general informational and operational purposes as part of the Transport Support archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To ensure controlled, traceable transfer of in-progress work — a towed or transported vehicle, a crated or packed load, or a staged service job — between successive work stages, crews, or shifts so that custody, condition, and outstanding tasks are never lost at the boundary. This protects customer property, prevents duplicated or dropped work, and preserves the chain of accountability across the operation.

2. Scope

Covers the operational handoff of a work item and its associated job record between two work stages, crews, or field-to-facility transitions within a single operation. Excludes shift handover of personnel duties and roster continuity, which is covered under OD-002, and stage quality release/conformance sign-off, which is covered under QC-013.

3. Responsibilities

- Operations Supervisor — owns the handoff process, resolves disputed custody or condition discrepancies, and authorizes work to proceed to the next stage.
- Releasing Operator (crew/stage handing off) — completes outstanding tasks or flags them, documents current condition, and briefs the receiving party.
- Receiving Operator (crew/stage taking over) — verifies the work item, condition record, and open items against the physical state before accepting custody.

4. Required PPE & Lockout/Tagout

- Standard facility and field PPE: high-visibility vest, safety footwear, and gloves; eye protection where handling straps, chains, or crating hardware.
- Lockout/Tagout applies only where the service line operates lift, winch, or powered material-handling equipment — isolate and tag energy sources per manufacturer procedure before any physical handoff involving that equipment. Not applicable to record-only handoffs.

5. Regulatory References

- 49 CFR 392 / 393 (FMCSA) — safe operation and cargo/vehicle securement, applicable wherever the service line moves or secures vehicles or loads on public roads.
- 29 CFR 1910 (OSHA General Duty and materials-handling provisions) — workplace safety obligations at fixed and field work locations.

- DOT chain-of-custody / property-in-custody documentation obligations under applicable state motor carrier and consumer-protection rules (e.g., state towing/storage disclosure statutes where applicable).
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

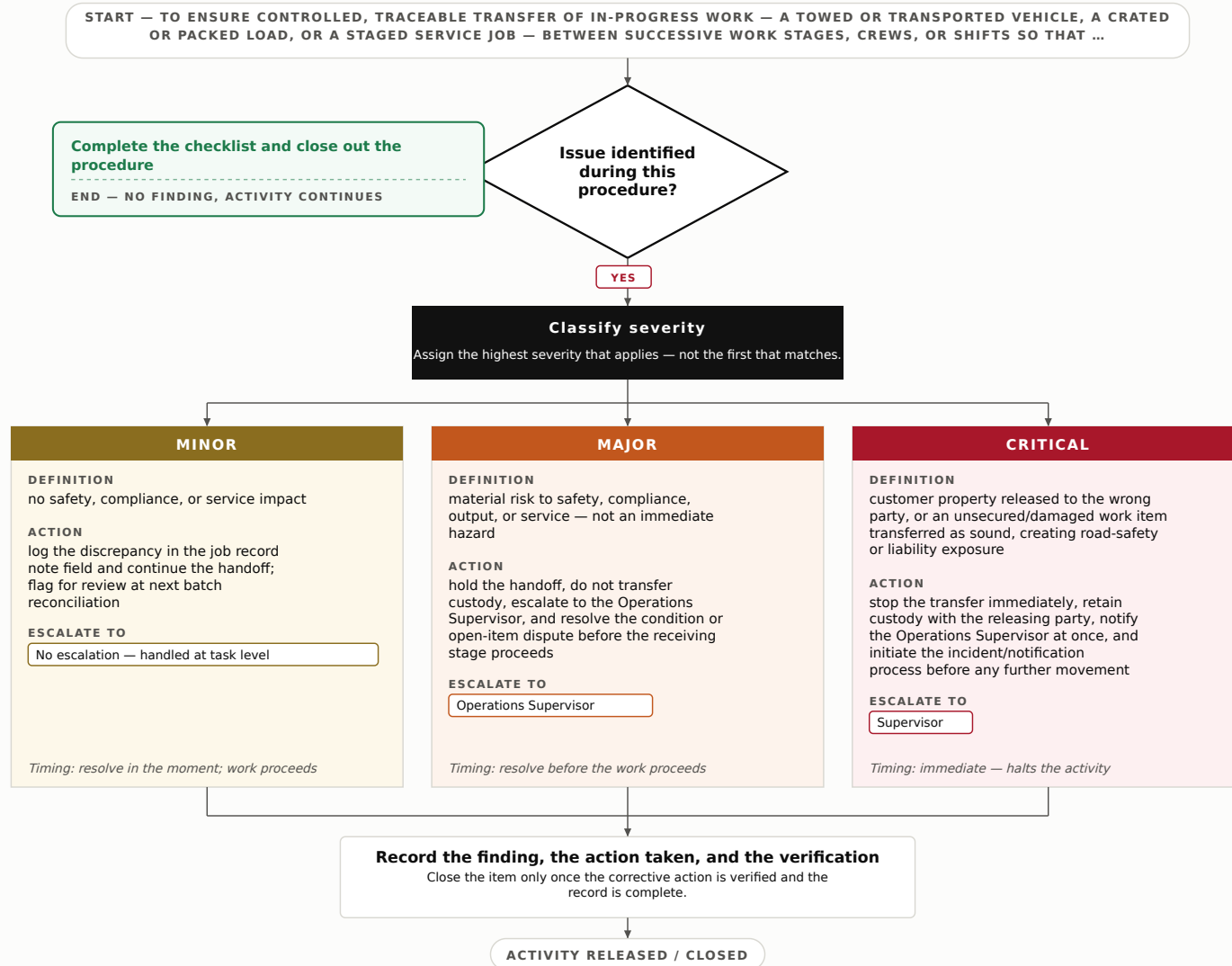


7. Step-by-Step Procedure

1. Releasing Operator confirms all tasks assigned to the current stage are either completed or explicitly flagged as open with reason and status.
2. Record the current condition of the work item — vehicle damage/fuel/mileage, load integrity, crate/pack status, or navigation/tracking device state — with dated photos or notes.
3. Confirm the work item is physically secured and safe to transfer (brakes set, straps/chains released or maintained as required, crate sealed as appropriate).
4. Releasing and Receiving Operators walk the item together; Receiving Operator verifies condition and open-item list matches the physical state.
5. Receiving Operator raises any discrepancy immediately; if none, formally accepts custody in the job record.
6. Transfer any keys, paperwork, securement hardware, and customer instructions; confirm count and condition of transferred items.
7. Operations Supervisor authorizes progression to the next stage where required by the job type.
8. Both parties sign/timestamp the handoff entry in the job record; releasing party retains no open accountability once accepted.

8. Decision Tree

Decision Tree — Operational Handoff Between Work Stages



READING THIS TREE

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Open-item list reconciled against physical state before custody accepted.
- Condition record dated and matches item at point of transfer.
- All keys, paperwork, and securement hardware transferred and counted.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
All current-stage tasks completed or flagged open		
Condition documented (photos/notes, dated)		
Work item secured and safe to transfer		
Receiving party verified physical state matches record		
Keys/paperwork/hardware transferred and counted		
Custody formally accepted in job record		
Handoff entry signed and timestamped by both parties		

11. KPIs

- Handoffs with complete condition + open-item documentation: $\geq 98\%$
- Custody or condition disputes raised after acceptance: $\leq 1\%$ of handoffs
- Median handoff completion time: ≤ 20 minutes

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for TRANSPORT_SUPPORT.	Archetype Content Team

OD-014 — Output Monitoring & Throughput Review

Estimated completion time: 20–40 minutes per shift or dispatch cycle

Provided for general informational and operational purposes as part of the Transport Support archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

This procedure establishes how the Operations team tracks the rate and volume of completed service jobs — tows, roadside assists, packing/crating orders, and other transport-support tasks — against the shift or period plan, so that shortfalls and bottlenecks are surfaced and acted on while the shift is still running.

2. Scope

Covers monitoring of operational throughput (jobs completed, units crated, calls cleared) versus the planned schedule for a given shift, day, or dispatch cycle across field and facility service lines. Excludes formal KPI review and target-setting, which is covered under OD-028, and process capability analysis, which is covered under QC-026.

3. Responsibilities

- Operations Supervisor — owns the throughput plan for the shift, reviews actuals against plan at defined intervals, and authorizes corrective reallocation of crews or equipment.
- Dispatcher / Coordinator — logs job start/completion times, maintains the live output tally, and flags variances to the Supervisor as they arise.
- Operations Lead (Field/Facility) — confirms on-the-ground status of in-progress jobs and reports blockers (equipment down, staging delays, staffing gaps) affecting rate.

4. Required PPE & Lockout/Tagout

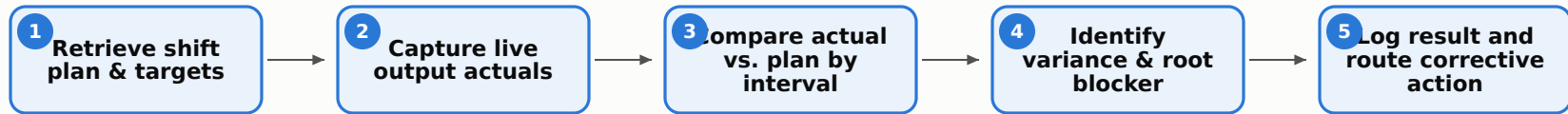
- Standard facility PPE where the review is conducted at a staging yard or crating floor (high-visibility vest, safety footwear); no additional PPE required for the monitoring/records task itself.
- Not applicable — no hazardous energy involved in this monitoring task. LOTO governs the serviced equipment, not this procedure.

5. Regulatory References

- None sector-specific to output monitoring itself; internal operations policy is the governing basis for throughput targets and review cadence.
- Applicable general obligations that constrain how output may be planned/measured: 49 CFR Part 395 (Hours of Service) where the service line operates commercial motor vehicles; DOT/FMCSA record and safety-management duties under 49 CFR Parts 390–396 where applicable; OSHA 29 CFR 1904 recordkeeping where output data intersects incident logs.
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

OD-014 PROCESS FLOW

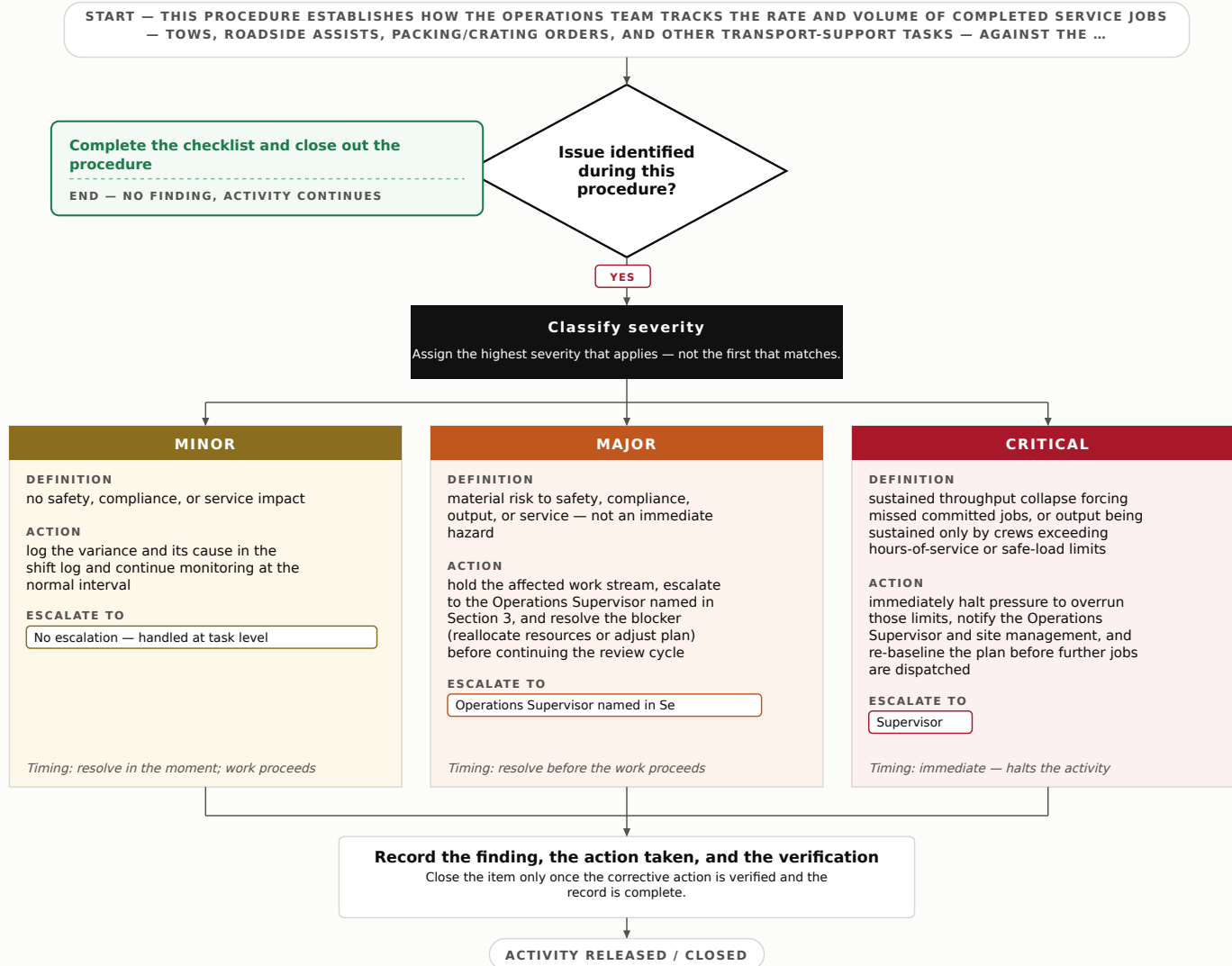


7. Step-by-Step Procedure

1. At shift start, retrieve the approved output plan (planned jobs/units by hour or cycle) from the dispatch system or shift board and confirm crew, vehicle, and equipment availability against it.
2. Establish the tally method for the shift — dispatch-log timestamps, completed-order count, or units crated — and confirm each completion is recorded consistently at close of each job.
3. At each defined checkpoint (e.g., every 2 hours or per dispatch cycle), pull the running actual count of completed output.
4. Compare actual throughput against the planned rate for that interval; calculate the cumulative variance (ahead/behind) in jobs or units.
5. Where behind plan, identify the limiting factor — crew availability, equipment downtime, staging/queue delay, or inbound job volume — and note it against the interval.
6. Apply within-authority corrective action (reassign crew, re-sequence queue, escalate equipment status) and re-check output at the next interval to confirm effect.
7. Classify any issue per the Decision Tree and route it accordingly.
8. At shift end, record final actual-vs-plan output, variance causes, and actions taken in the shift log for handoff.

8. Decision Tree

Decision Tree — Output Monitoring & Throughput Review



READING THIS TREE

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Output plan retrieved and confirmed against actual crew/equipment availability at shift start.
- Every completed job/unit recorded with a consistent completion definition and timestamp.
- Variance calculated and root cause noted at each defined interval.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Approved shift output plan retrieved and available		
Tally method defined and applied consistently		
Actuals captured at each scheduled checkpoint		
Cumulative variance vs. plan calculated		
Root cause noted for any interval behind plan		
Corrective actions logged with re-check result		
Shift-end output summary recorded for handoff		

11. KPIs

- Throughput attainment (actual vs. planned output) $\geq$ 95% per shift.
- Variance logging completeness (intervals with actuals captured) = 100%.
- Time to escalate a Major variance $\leq$ 30 minutes from identification.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for TRANSPORT_SUPPORT.	Archetype Content Team

OD-015 — Bottleneck Identification & Response

Estimated completion time: 30-90 minutes per identified constraint (excludes multi-shift structural constraints)

Provided for general informational and operational purposes as part of the Transport Support archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

This procedure defines how Operations detects constraints that slow throughput at a Transport Support operation — dispatch queues, staging/yard congestion, crew or equipment availability, or packing/crating station backlogs — and responds to restore flow without compromising safety or service commitments.

2. Scope

Covers real-time and shift-level identification, classification, and response to operational bottlenecks across dispatch, staging, field service, and packing/crating functions. Excludes schedule changes, which are covered under OD-017, and capacity allocation, which is covered under OD-009; this procedure hands off to those modules when the response requires either.

3. Responsibilities

- Operations Supervisor — owns bottleneck monitoring for the shift, classifies severity, authorizes containment actions, and initiates hand-offs to OD-017/OD-009.
- Dispatch/Coordination Lead — surfaces queue and assignment constraints from live boards, flags stalled jobs, and reroutes work within existing capacity.
- Field/Station Operator — reports on-the-ground constraints (equipment fault, blocked staging lane, materials shortage) to the Coordination Lead and executes local corrective steps.

4. Required PPE & Lockout/Tagout

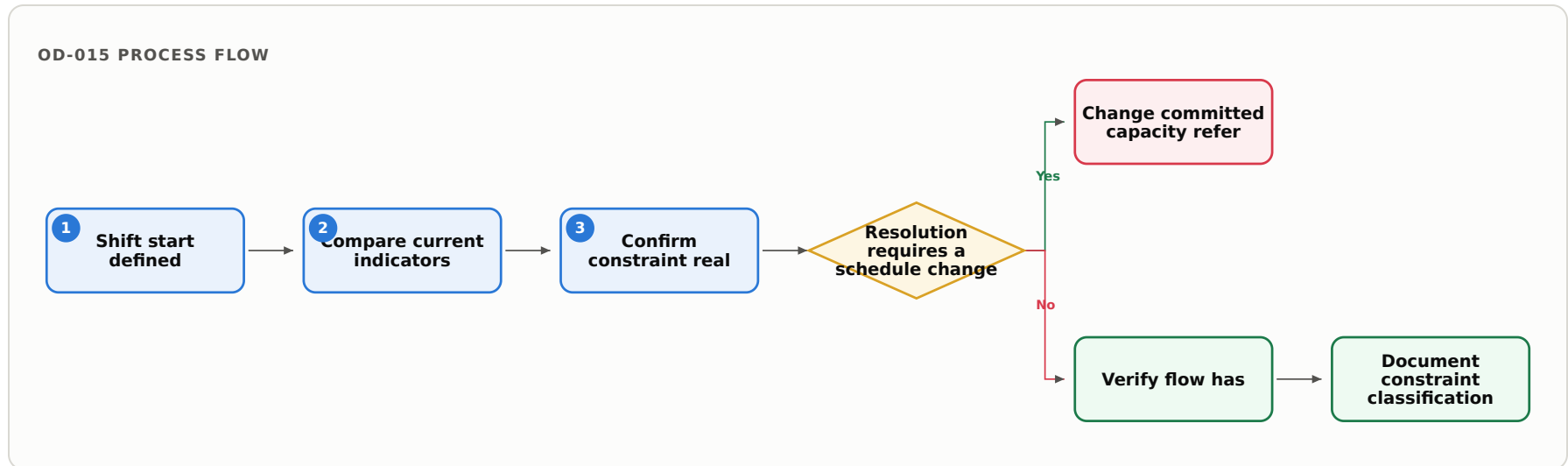
- Standard facility PPE where staging or packing areas are entered (high-visibility vest, safety footwear); no additional PPE for board/console monitoring.
- Not applicable — no hazardous energy involved. If a bottleneck is traced to a faulted vehicle or powered handling device, LOTO for that unit is governed by its own maintenance procedure and is out of scope here.

5. Regulatory References

- 29 CFR 1910 (OSHA General Duty / general industry — safe access to work areas during congestion response)
- 49 CFR Part 395 (Hours of Service) — applicable where the service line operates commercial motor vehicles or drivers subject to FMCSA
- DOT/FMCSA operating-authority conditions where the service line performs road-transportation support with CMVs

- None additional sector-specific to all members; internal Operations policy governs board-level monitoring and escalation.
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow



7. Step-by-Step Procedure

1. At shift start and at defined intervals, the Coordination Lead reviews live indicators: open-job queue depth, average job-to-assignment time, staging/yard lane occupancy, crew and equipment availability, and packing/crating station backlog.
2. Compare current indicators against normal-operating thresholds for the shift; flag any indicator breaching threshold as a candidate bottleneck.
3. Confirm the constraint is real, not a data artifact — verify with the Field/Station Operator or by direct observation of the queue, lane, or station.
4. Identify the root constraint type: demand surge, resource shortage (crew/equipment), materials shortage (e.g., crating stock, parts), physical congestion, or upstream dependency delay.
5. Classify severity using the Decision Tree (Section 8).
6. Apply the response: reroute or resequence work within current capacity; if resolution requires a schedule change refer to OD-017, or a change in committed capacity refer to OD-009 — do not action those here.
7. Verify flow has resumed — re-check the breached indicator to confirm it has returned within threshold.
8. Document the constraint, classification, response taken, hand-offs, and outcome in the shift operations log.

8. Decision Tree

Decision Tree — Bottleneck Identification & Response

START — THIS PROCEDURE DEFINES HOW OPERATIONS DETECTS CONSTRAINTS THAT SLOW THROUGHPUT AT A TRANSPORT SUPPORT OPERATION — DISPATCH QUEUES, STAGING/YARD CONGESTION, CREW OR EQUIPMENT AVAILABILITY, OR ...

Complete the checklist and close out the procedure

END — NO FINDING, ACTIVITY CONTINUES

Issue identified during this procedure?

YES

Classify severity

Assign the highest severity that applies — not the first that matches.

MINOR

DEFINITION

no safety, compliance, or service impact

ACTION

Log the constraint in the shift operations log, apply a local resequence, and continue monitoring

ESCALATE TO

No escalation — handled at task level

Timing: resolve in the moment; work proceeds

MAJOR

DEFINITION

material risk to safety, compliance, output, or service — not an immediate hazard

ACTION

Hold the affected work at the queue or station, escalate to the Operations Supervisor, and resolve before releasing further jobs into the constrained path; hand off to OD-017 or OD-009 if the fix requires either

ESCALATE TO

Operations Supervisor

Timing: resolve before the work proceeds

CRITICAL

DEFINITION

a constraint forcing operators or drivers past Hours-of-Service limits, or unsafe overloading of a staging lane / handling task to "catch up," or a service failure on a committed safety-of-life or emergency-response job

ACTION

Stop the affected work immediately, notify the Operations Supervisor and (where drivers/CMVs are involved) the safety compliance contact, and do not resume until the constraint is cleared and safe operation is confirmed

ESCALATE TO

Supervisor

Timing: immediate — halts the activity

Record the finding, the action taken, and the verification

Close the item only once the corrective action is verified and the record is complete.

ACTIVITY RELEASED / CLOSED

READING THIS TREE

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Live indicators reviewed at every defined interval with breaches flagged.
- Each confirmed constraint has a recorded root-cause type and severity classification.
- Any Major/Critical response verified as resolved before further work released into the path.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Live indicators reviewed against shift thresholds		
Confirmed constraint verified (not a data artifact)		
Root-cause type identified and recorded		
Severity classified per Decision Tree		
Response applied within current capacity		
Hand-off to OD-017 / OD-009 raised where required		
Flow re-check confirms indicator back within threshold		

11. KPIs

- Bottleneck detection-to-response time: ≤ 15 minutes for Major/Critical
- Constraints resolved within shift without service breach: $\geq 90\%$
- Recurring (repeat within 7 days) unresolved constraints: $\leq 5\%$ of logged constraints

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for TRANSPORT_SUPPORT.	Archetype Content Team

OD-016 — Rework & Nonconforming Work Handling

Estimated completion time: 30-90 minutes per nonconforming job (excludes queued re-run time)

Provided for general informational and operational purposes as part of the Transport Support archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

This procedure establishes how Operations identifies, segregates, and re-runs service work — vehicle recoveries, load transfers, cargo securement, and packing/crating jobs — that fails to meet the applicable spec, so that no nonconforming work reaches the customer or the downstream channel. It protects load integrity, roadway safety, and service reliability.

2. Scope

Covers containment, tagging, tracking, and re-run of any Operations output flagged as out-of-spec — improper securement, damaged packaging/crating, incomplete recovery, or mismatched documentation. Excludes formal disposition decisions (accept/repair/scrap/return), which are covered under QC-014, and rework authorization, which is covered under QC-016.

3. Responsibilities

- Operations Supervisor — confirms segregation, initiates escalation, verifies re-run acceptability before release.
- Lead Operator (Field or Dock) — identifies nonconformance, applies hold status, performs re-run under direction.
- Quality/Compliance Coordinator — logs the nonconformance, tracks it to closure, hands off to QC-014/QC-016 for disposition and authorization.

4. Required PPE & Lockout/Tagout

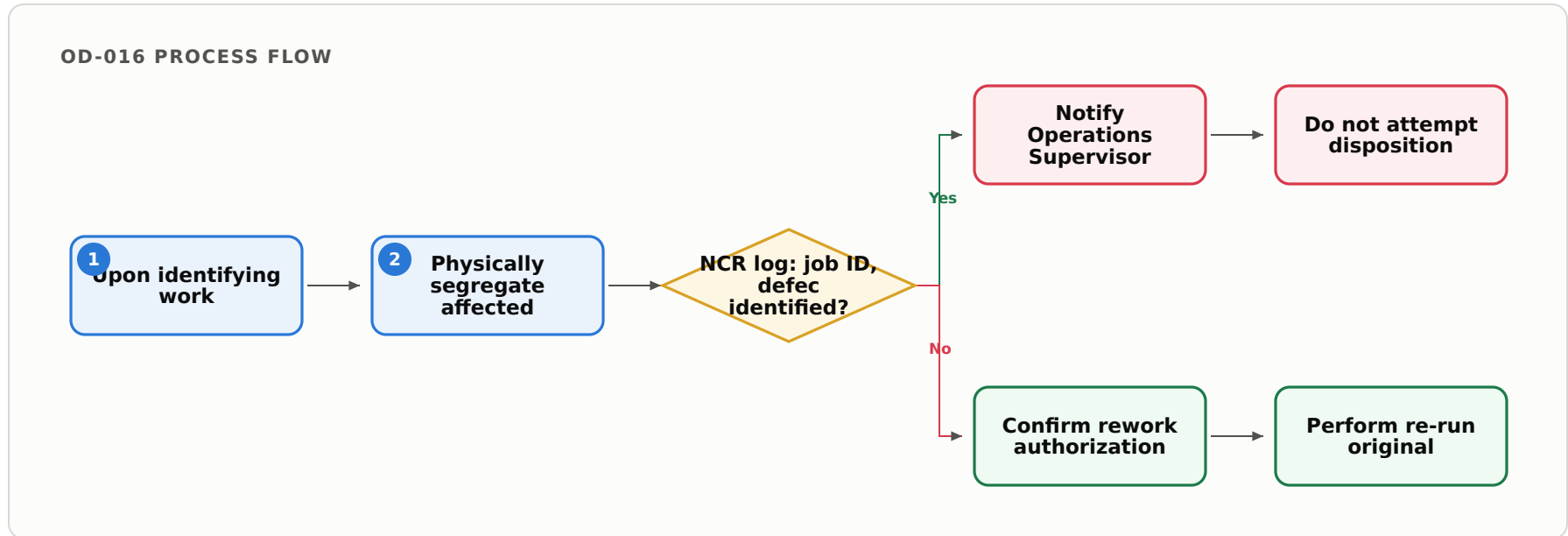
- Standard facility/field PPE: high-visibility vest, safety footwear, cut-resistant gloves; eye protection when handling strapping, banding, or crating hardware.
- Lockout/Tagout: Applicable only where re-run requires immobilizing a vehicle, lift, or powered dock equipment — secure hazardous energy and apply LOTO per site program before handling. Otherwise not applicable for documentation-only nonconformance.

5. Regulatory References

- 49 CFR 393 (Parts and Accessories Necessary for Safe Operation, incl. Subpart I cargo securement) — applies where the service line secures or transports loads.
- 49 CFR 396 (Inspection, Repair, and Maintenance) — condition of equipment returned to service after re-run.
- 29 CFR 1910 (OSHA General Industry — materials handling, PPE, hazardous energy) for facility-based packing/crating and dock work.
- Internal Quality Policy QP-OD for nonconformance identification and hold control where no sector-specific rule governs.

- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

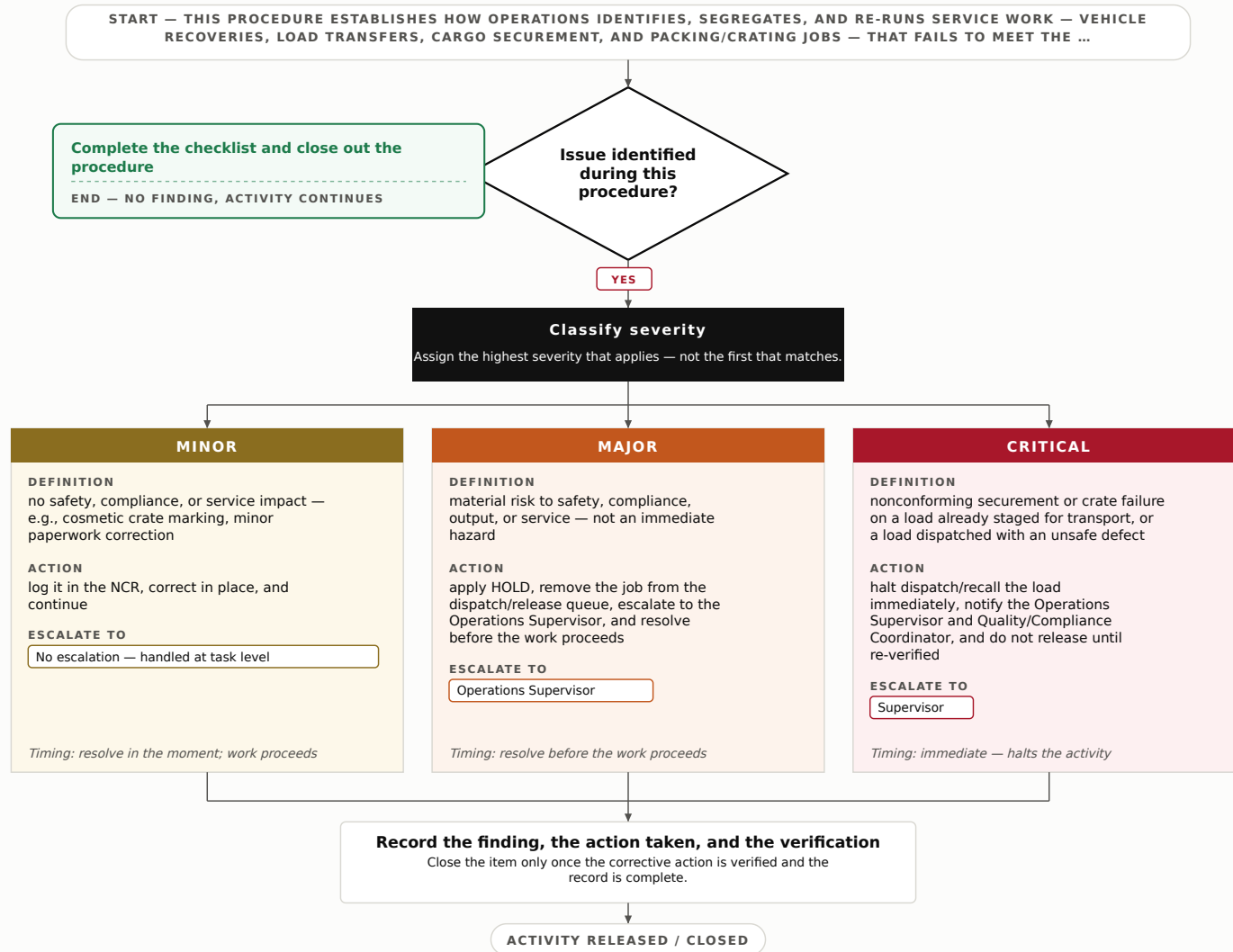


7. Step-by-Step Procedure

1. Upon identifying work that fails the applicable spec (securement, packaging integrity, recovery completeness, or documentation), stop the release of that job immediately.
2. Physically segregate the affected work — move crated/packed items to the designated HOLD area, or keep the vehicle/load staged and not dispatched. Apply a NONCONFORMING/HOLD tag with job number, date, and identifier.
3. Record the nonconformance in the NCR log: job ID, defect description, spec violated, upstream part or material involved (e.g., securement hardware or crate stock from 336390), and detecting operator.
4. Notify the Operations Supervisor and Quality/Compliance Coordinator; do not attempt disposition — hand off the accept/repair/scrap/return decision to QC-014.
5. Confirm rework authorization is granted per QC-016 before any re-run begins; do not re-run on HOLD work without it.
6. Perform the re-run to the original spec — re-secure the load, rebuild/repack the crate, or re-execute the recovery — using conforming materials and correct method.
7. Re-verify the re-run against the same spec that failed; remove the HOLD tag only after the Supervisor confirms conformance.
8. Document the closure in the NCR log with re-run result, verifier, and release timestamp; retain the record per internal retention policy.

8. Decision Tree

Decision Tree — Rework & Nonconforming Work Handling



READING THIS TREE

No finding

Activity stands. Complete the checklist and continue.

Minor

Handled in place at task level; no escalation.

Major

Supervisory decision required before the next stage.

Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every nonconforming job is physically segregated and tagged before any other handling.
- NCR log entry exists and is complete before disposition hand-off.
- Re-run verified against the original failed spec, not a relaxed one.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Nonconforming work physically segregated and HOLD-tagged		
NCR logged with job ID, defect, and spec violated		
Disposition routed to QC-014 (not decided here)		
Rework authorization confirmed per QC-016 before re-run		
Re-run performed with conforming materials/method		
Re-run re-verified against original spec		
HOLD tag removed and closure documented		

11. KPIs

- Nonconforming work escaping to customer/channel: 0 per quarter
- Segregation-and-tag completed within same shift as detection: $\geq 98\%$
- Re-run first-pass verification rate (passes re-verification on first attempt): $\geq 90\%$

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for TRANSPORT_SUPPORT.	Archetype Content Team

OD-017 — Schedule Deviation & Change Management

Estimated completion time: 20-45 minutes per deviation event

Provided for general informational and operational purposes as part of the Transport Support archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

This procedure establishes how the Operations team records, classifies, and re-commits to service schedule changes — delays, priority shifts, cancellations, and re-sequencing — so that dispatch commitments, driver/crew hours, and job order sequencing remain controlled and auditable across towing, road-support, packing/crating, and other transportation-support service lines.

2. Scope

Covers detection, logging, classification, re-scheduling, and internal re-commitment of any deviation from a planned service schedule or job priority within Operations. Excludes bottleneck root-cause response, which is covered under OD-015, and customer notification of schedule changes, which is covered under OD-022.

3. Responsibilities

- Operations Dispatcher — detects deviations, logs them in the dispatch/job record, re-sequences assignments, and initiates re-commitment.
- Operations Supervisor — classifies severity, authorizes priority overrides, and approves changes affecting driver/crew hours or contractual commitments.
- Records Coordinator — maintains the deviation log, verifies retention, and reconciles closed events against original commitments.

4. Required PPE & Lockout/Tagout

- Standard facility PPE where the deviation is reviewed at a dispatch station (none beyond office norms); high-visibility apparel per site rules if reclassification occurs at a staging yard or roadside where the service line operates vehicles.
- Not applicable — no hazardous energy involved in this administrative/coordination task.

5. Regulatory References

- 49 CFR Part 395 (Hours of Service) — where the service line operates commercial motor vehicles, schedule changes must not push driver hours beyond limits.
- 49 CFR Part 390 (FMCSA General — records and recordkeeping) — applicable where members operate under FMCSA authority.
- 29 CFR 1904 (OSHA recordkeeping) — where a deviation intersects a recordable event.
- None sector-specific governs schedule change management as such; internal Operations dispatch policy is the governing frame, with the above applying where the member operates vehicles or drivers.

- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

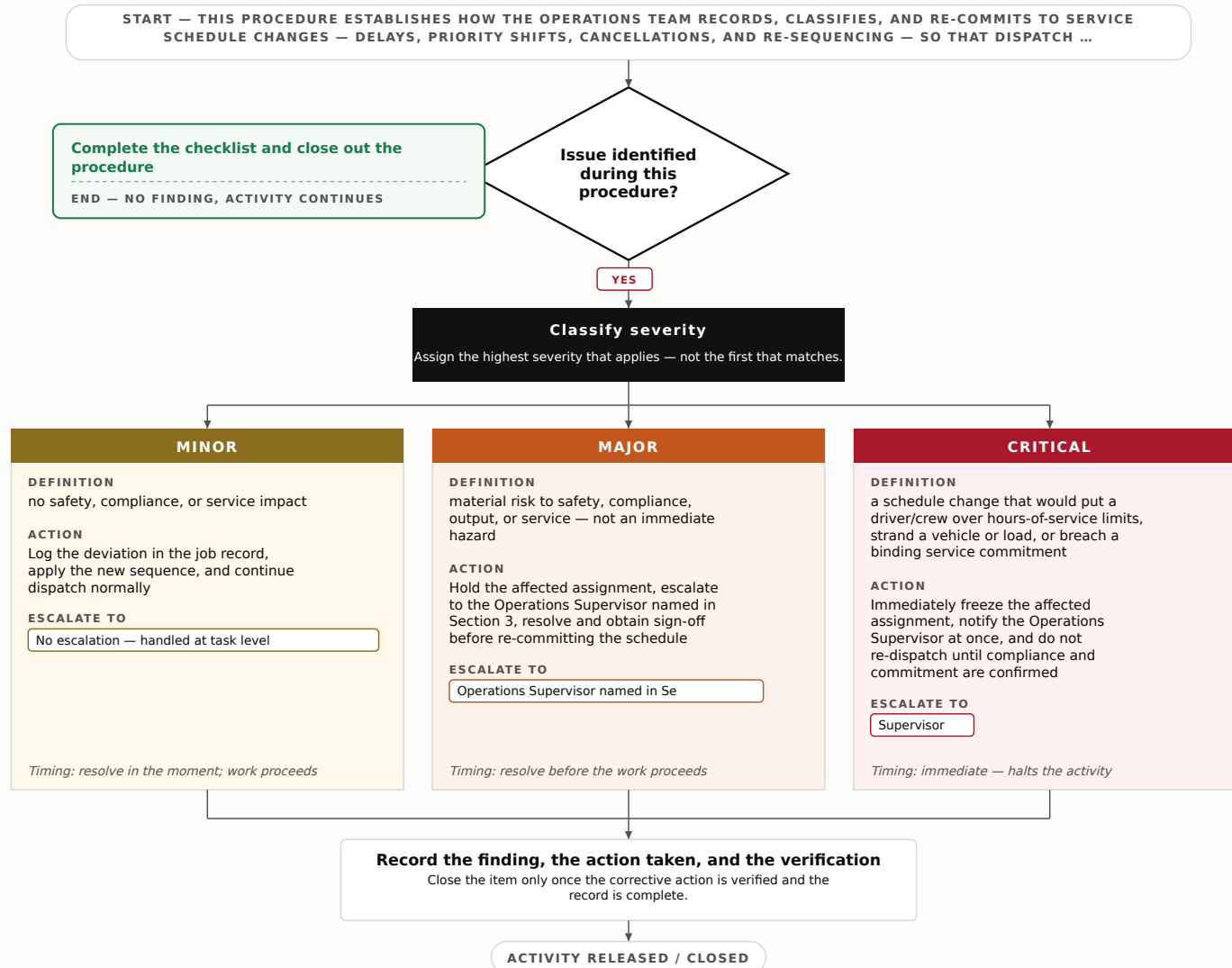


7. Step-by-Step Procedure

1. Detect the deviation against the active schedule (delay, cancellation, priority bump, resource shortfall, or upstream parts/fuel/navigation-data failure).
2. Timestamp the event and open a deviation entry in the dispatch/job record, capturing original commitment time and affected job number(s).
3. Verify current driver/crew hours and equipment availability before proposing any re-sequence, where the service line operates vehicles.
4. Classify severity per Section 8 and route to the Operations Supervisor if Major or Critical.
5. Re-sequence affected assignments and establish a new committed time; confirm the new commitment does not violate hours-of-service limits.
6. Record the new commitment and the authorization (Supervisor sign-off for Major/Critical) in the job record; flag any hand-off to OD-022 for customer notification.
7. Confirm downstream service turnover impact with the applicable channel where equipment or crated goods are due to a Transportation Equipment Wholesaler (423860).
8. Close the deviation entry, ensuring the Records Coordinator has logged classification, resolution, and new commitment for retention.

8. Decision Tree

Decision Tree — Schedule Deviation & Change Management



READING THIS TREE

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every deviation carries an original commitment time and a new committed time in the record.
- All Major/Critical changes bear Operations Supervisor authorization.
- New commitments verified against hours-of-service limits where vehicles/drivers are involved.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Deviation logged with timestamp and job number		
Original vs. new commitment time both recorded		
Severity classified per Section 8		
Driver/crew hours verified where applicable		
Supervisor authorization present for Major/Critical		
Notification hand-off to OD-022 flagged if required		
Entry closed and forwarded to Records Coordinator		

11. KPIs

- Deviations logged with complete commitment data — $\geq 98\%$
- Major/Critical changes with documented authorization — 100%
- Re-commitments made within 30 minutes of detection — $\geq 90\%$

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for TRANSPORT_SUPPORT.	Archetype Content Team

OD-018 — Subcontractor & Vendor Coordination

Estimated completion time: 45-90 minutes per vendor engagement (excluding vendor lead time)

Provided for general informational and operational purposes as part of the Transport Support archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To establish a consistent method for engaging, dispatching, and coordinating external subcontractors and vendors — recovery/tow partners, packing and crating specialists, equipment/parts suppliers, and specialty transport providers — so that work performed on behalf of the operation meets the customer commitment, the correct provider is used, and the hand-off is documented.

2. Scope

Covers vendor selection, engagement authorization, work-order hand-off, on-job coordination, and close-out for any external provider performing part of a Transport Support operation. Excludes contractor maintenance supervision, which is covered under MD-018, and contractor safety oversight, which is covered under SD-023.

3. Responsibilities

- Operations Coordinator — verifies vendor eligibility, issues the work order, coordinates timing/location, and closes out the engagement.
- Dispatch/Duty Supervisor — approves engagement of an external provider, confirms scope and authorization limits, resolves escalations.
- Vendor Records Clerk — maintains the approved-vendor file, insurance certificates, and executed rate/scope agreements.

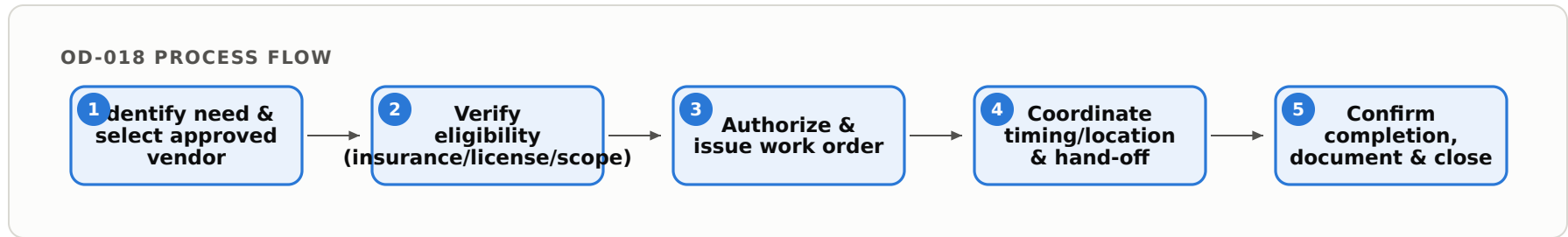
4. Required PPE & Lockout/Tagout

- Standard facility PPE for coordination staff; where the service line stages vehicles or handles crated freight, high-visibility apparel per site rules when in the operating yard.
- Not applicable — coordination is an administrative/dispatch task with no hazardous energy controlled by this procedure; any energy control at the vendor's work site is the vendor's responsibility.

5. Regulatory References

- 49 CFR Part 375 (transportation of household goods / consumer protection) and 49 CFR Parts 390–396 (FMCSA safety regulations) where the engagement involves for-hire motor carriage; applicable state motor-carrier/tow licensing and rotation rules; FTC 16 CFR Part 436 and general contract/UCC provisions governing vendor agreements. Where no sector-specific standard governs a given engagement, internal procurement and vendor-approval policy applies. Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

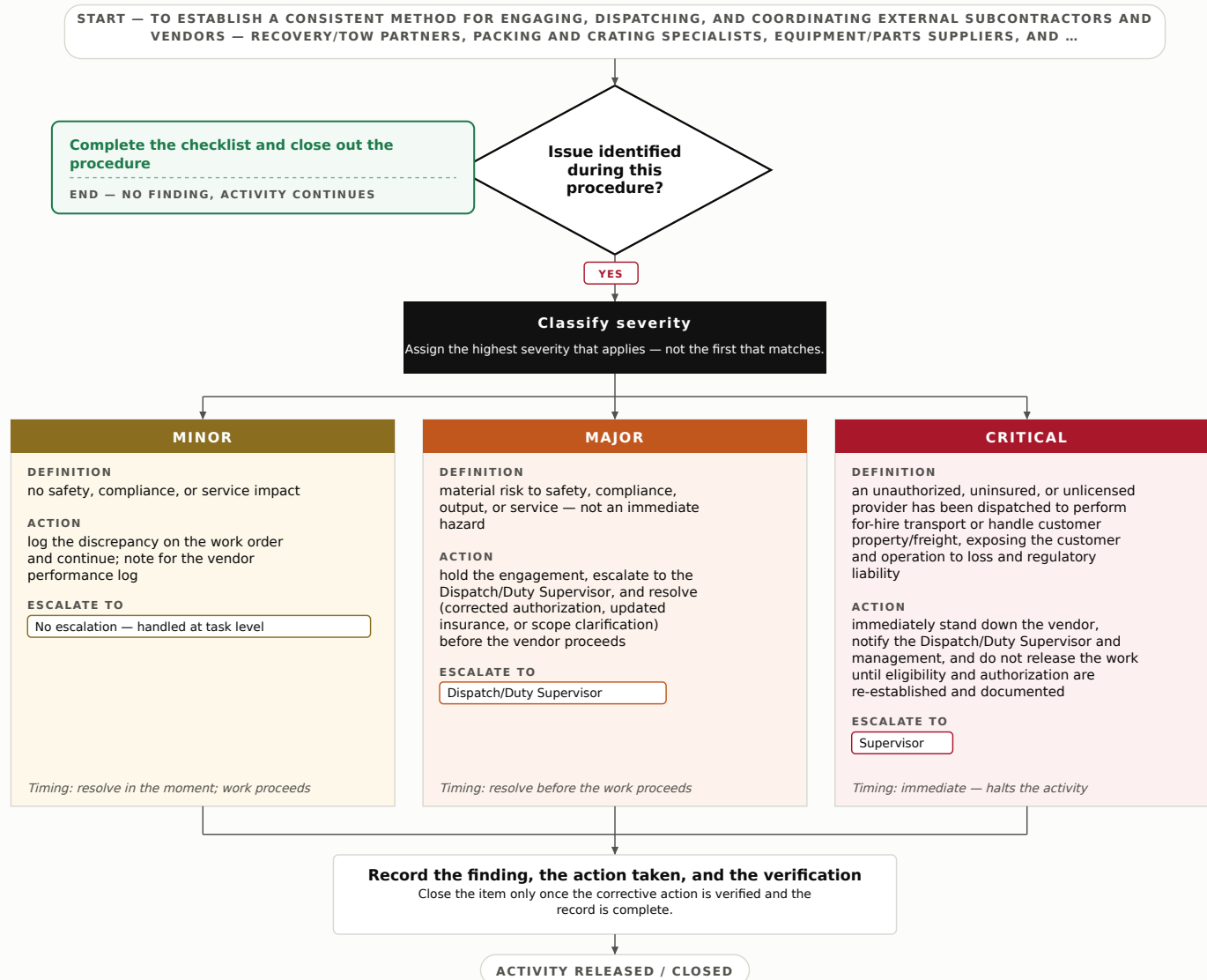


7. Step-by-Step Procedure

1. Determine the external-provider need (recovery/tow, packing & crating, parts/equipment supply, specialty transport) and confirm it cannot be handled in-house.
2. Select a provider from the approved-vendor file; confirm the vendor's scope matches the task and that a current rate/scope agreement is on file.
3. Verify eligibility: current certificate of insurance, applicable operating authority/license, and that the vendor is not on hold. Escalate any gap to the Dispatch/Duty Supervisor.
4. Obtain engagement authorization from the Dispatch/Duty Supervisor for jobs exceeding standing authorization limits.
5. Issue the work order specifying scope, location, timing, customer reference, and any parts/equipment to be supplied (e.g., replacement components from 336390 or navigation units from 334511) or freight to be forwarded downstream via 423860.
6. Coordinate timing and site access with the vendor and the customer; confirm the vendor acknowledges scope and expected arrival/completion window.
7. Monitor progress; on completion confirm the deliverable/service matches the work order and reconcile against the vendor's invoice/rate agreement.
8. Document the engagement — work order, communications, verification, and close-out — in the job record and update the vendor performance log.

8. Decision Tree

Decision Tree — Subcontractor & Vendor Coordination



READING THIS TREE

■ **No finding**

Activity stands. Complete the checklist and continue.

■ **Minor**

Handled in place at task level; no escalation.

■ **Major**

Supervisory decision required before the next stage.

■ **Critical**

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Selected vendor is on the approved list with a current, in-scope rate/scope agreement.
- Insurance certificate and applicable operating authority verified before dispatch.
- Work order scope, timing, and customer reference confirmed and acknowledged by the vendor.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Vendor on approved list with valid scope agreement		
Current certificate of insurance on file		
Applicable operating authority/license verified		
Engagement authorized per authorization limits		
Work order issued with scope, location, timing		
Vendor acknowledged scope and window		
Completion verified and engagement documented		

11. KPIs

- Vendor eligibility verified before dispatch: 100%
- On-time vendor arrival/completion vs. committed window: $\geq 90\%$
- Work orders closed out with complete documentation: $\geq 98\%$

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for TRANSPORT_SUPPORT.	Archetype Content Team

OD-019 — Interdepartmental Coordination Review

Estimated completion time: 45-90 minutes per coordination cycle

Provided for general informational and operational purposes as part of the Transport Support archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

This procedure aligns Operations with the other departments that touch the same job — dispatch/scheduling, safety, billing, and customer service — so that a service order (a tow, a road-support call, a pack-and-crate job, or a transportation-support engagement) moves cleanly across department boundaries without gaps, duplicate effort, or dropped commitments.

2. Scope

Covers the recurring review and hand-off alignment between Operations and neighboring departments for active and pending work orders at this archetype. Excludes spec-conformance and load/crate quality verification, which is covered under QC-003; excludes billing dispute resolution, which lives in its owning finance module.

3. Responsibilities

- Operations Supervisor — owns the coordination review, confirms each open work order has a clear owner at every touchpoint, and resolves cross-department discrepancies.
- Dispatch/Scheduling Coordinator — reconciles job status, ETAs, and asset assignments (vehicles, equipment, crews) against the Operations record.
- Compliance/Safety Lead — verifies that driver/vehicle documentation, hours-of-service, and hazard notes are current for jobs about to be released to the field or facility floor.

4. Required PPE & Lockout/Tagout

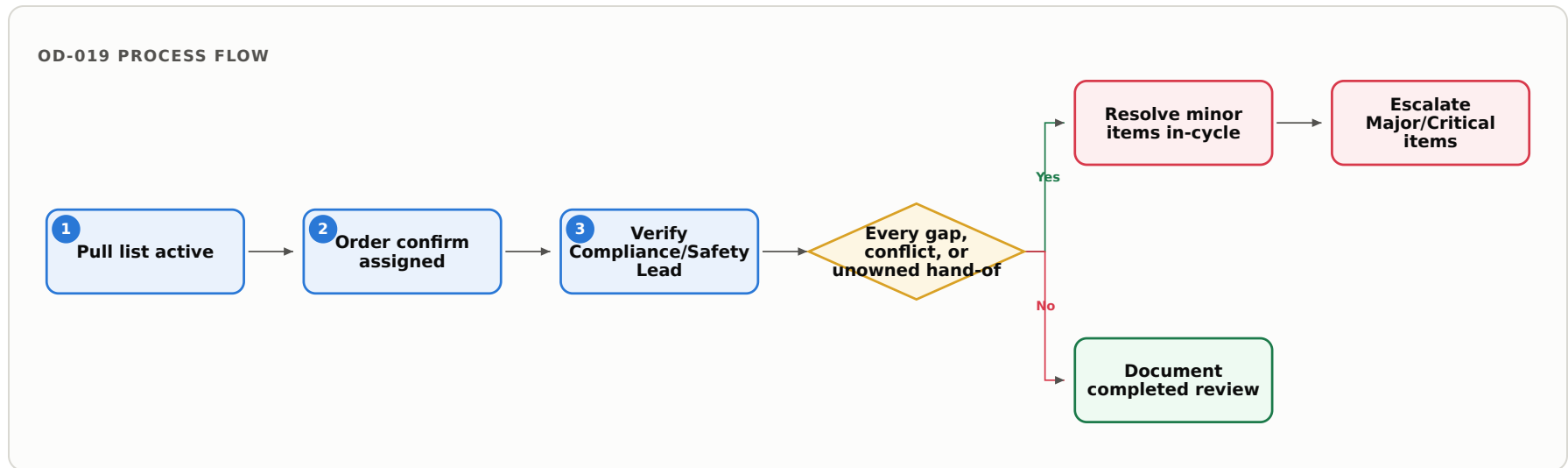
- Standard facility PPE where the review occurs on an operating floor (high-visibility vest, safety footwear); office PPE not required for the desk portion of this review.
- Not applicable — no hazardous energy involved; this is a coordination and records task, not equipment servicing.

5. Regulatory References

- 49 CFR Part 390–396 (FMCSA — general applicability, driver/vehicle records and inspection recordkeeping) where the service line operates commercial motor vehicles.
- 29 CFR 1910 (OSHA General Duty and general industry standards, including hazard communication) applicable to all members' work areas.

- DOT hazardous-materials communication under 49 CFR Parts 171-172 (e.g., where a pack-and-crate or support job involves regulated commodities).
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

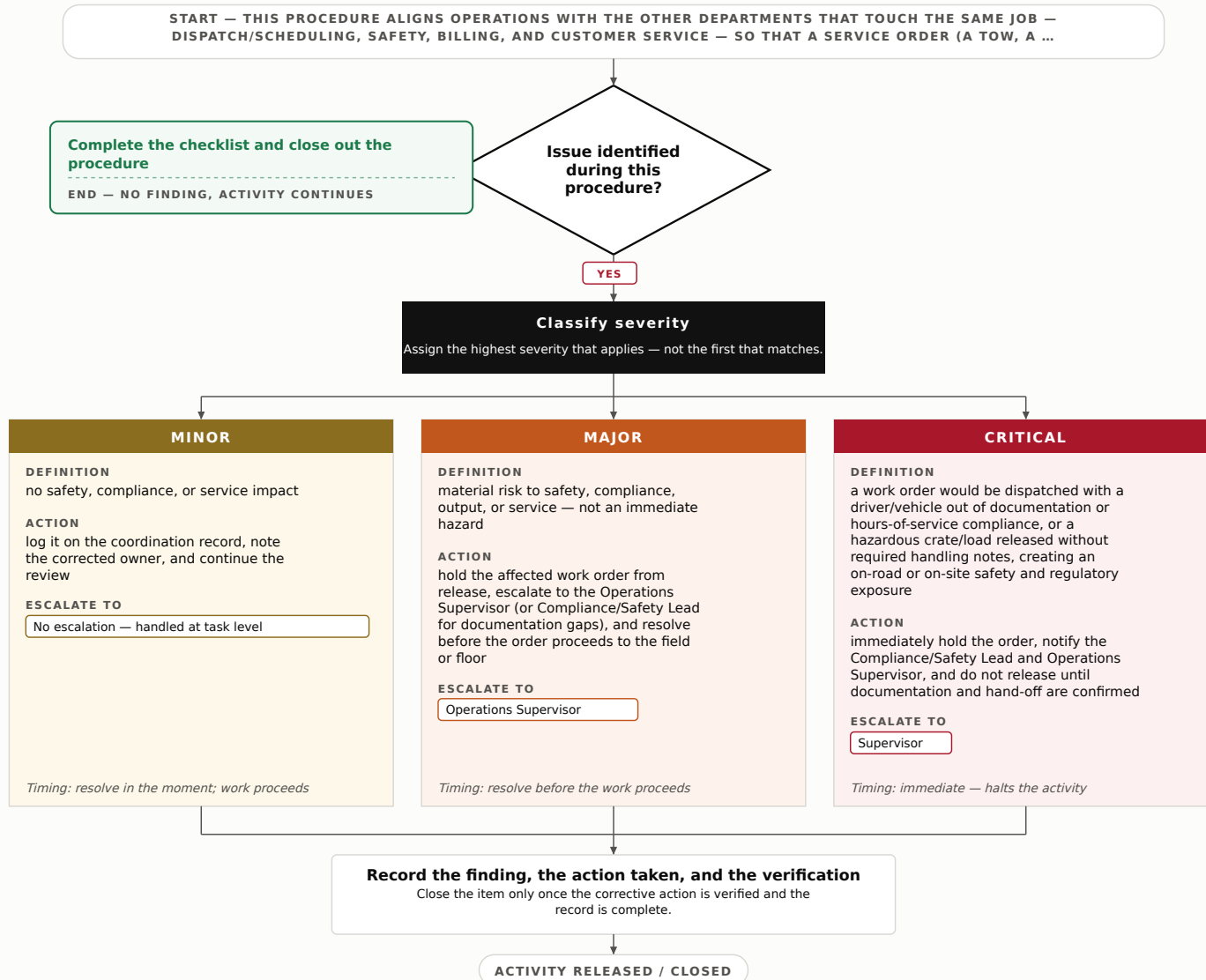


7. Step-by-Step Procedure

1. Pull the list of active and pending work orders from the Operations record for the review window (shift, day, or scheduled cycle).
2. For each order, confirm the assigned asset and crew match Dispatch/Scheduling — flag any vehicle, equipment, or personnel double-booking.
3. Verify with the Compliance/Safety Lead that driver/vehicle documentation and hours-of-service status permit release for field-based orders, and that hazard/handling notes are attached for facility-based pack-and-crate orders.
4. Confirm customer commitments (ETA, service scope, contact) are consistent between the Operations record and Customer Service.
5. Reconcile billing readiness — confirm each completed or in-progress order carries the codes/notes billing needs, without authoring or resolving billing disputes.
6. Identify every gap, conflict, or unowned hand-off; classify per Section 8.
7. Resolve minor items in-cycle; escalate Major/Critical items to the responsible role and record the disposition.
8. Document the completed review, note all findings and resolutions, and close out the coordination cycle with the checklist.

8. Decision Tree

Decision Tree — Interdepartmental Coordination Review



READING THIS TREE

■ **No finding**

Activity stands. Complete the checklist and continue.

■ **Minor**

Handled in place at task level; no escalation.

■ **Major**

Supervisory decision required before the next stage.

■ **Critical**

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every open work order has a named owner at each department touchpoint.
- Asset and crew assignments reconciled with no double-booking.
- Compliance/documentation status confirmed for all orders queued for release.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
All active/pending work orders pulled for the review window		
Asset and crew assignments match Dispatch/Scheduling		
Driver/vehicle documentation and hours-of-service confirmed (field orders)		
Hazard/handling notes attached (facility/crate orders)		
Customer commitments consistent across departments		
Billing readiness confirmed (codes/notes present)		
All findings logged with owner and disposition		

11. KPIs

- Work orders with complete cross-department hand-off at review close: $\geq 98\%$
- Coordination cycles completed on schedule: 100%
- Unresolved Major/Critical findings carried past cycle close: 0

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for TRANSPORT_SUPPORT.	Archetype Content Team

Phase 4 — Completion & customer handoff

OD-020 — Job / Order Completion Verification

Estimated completion time: 15-40 minutes per job/order

Provided for general informational and operational purposes as part of the Transport Support archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

This procedure confirms that a completed job or customer order — whether a towing/recovery run, a road-support call, a packing/crating job, or another transportation support service — has been performed to the agreed specification and is ready to move to final inspection and release. It prevents incomplete or non-conforming work from reaching the customer.

2. Scope

Covers verification that all specified work tasks, deliverables, securement, and documentation for a single job/order are complete and match the work order before hand-off. Excludes final inspection (covered under QC-012) and formal release/turnover (covered under QC-013); this procedure ends at confirming completeness and hands the job to those modules.

3. Responsibilities

- Operations Supervisor — owns the verification decision, signs off completeness, and routes findings; final authority to hold a job short of QC-012.
- Service Technician / Operator — performs the completion self-check against the work order and presents the job for verification.
- Dispatch / Order Coordinator — reconciles the work order against the original customer request and confirms all line items are accounted for.

4. Required PPE & Lockout/Tagout

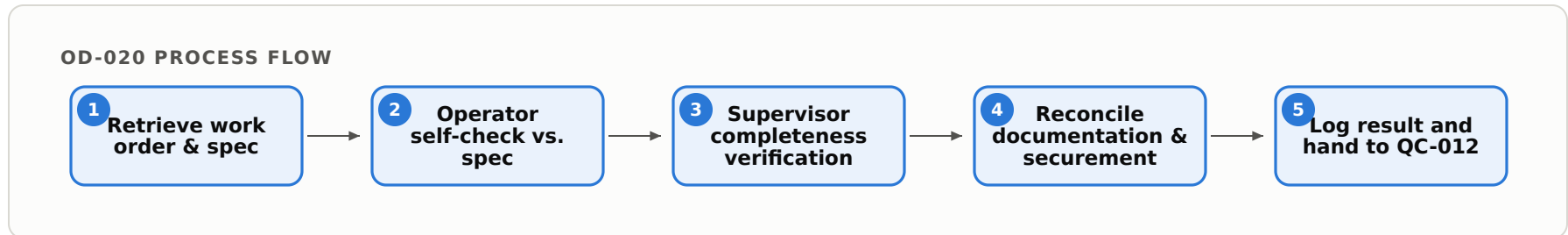
- Standard facility PPE: high-visibility vest and safety footwear where the service line operates vehicles or works near active traffic or loading areas; gloves and eye protection where handling straps, chains, or crating materials.
- Not applicable — no hazardous energy source is de-energized in this verification task. Where a vehicle or lift remains staged, confirm it is secured/chocked before inspecting under or around it.

5. Regulatory References

- 49 CFR 393 (Parts and Accessories Necessary for Safe Operation, incl. §393.100–.136 cargo/load securement) — applies where the service line moves or secures vehicles or freight.
- 49 CFR 396 (Inspection, Repair, and Maintenance) — condition/completion documentation where the operator maintains commercial vehicles or equipment.
- 29 CFR 1910 (OSHA General Duty / General Industry) — workplace safety applicable to all members regardless of facility or field setting.

- None additional sector-specific to every member; internal work-order and completion policy applies where the above do not.
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

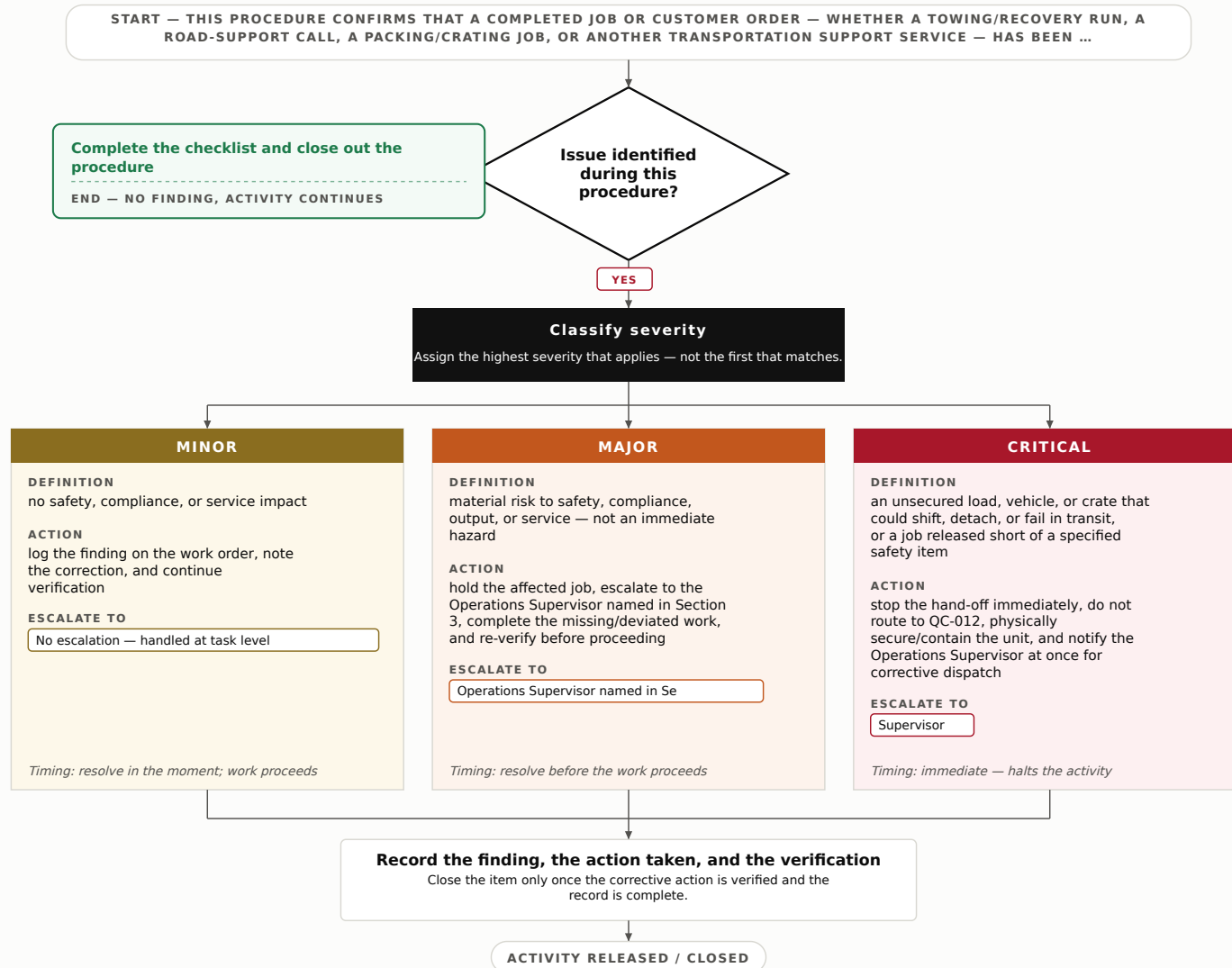
6. Process Flow



7. Step-by-Step Procedure

1. Retrieve the work order and any customer-specified requirements (destination, securement class, crating spec, parts installed sourced per 336390/334511, fluids/consumables per 324110).
2. Operator confirms every line item on the work order was performed; mark any incomplete or deviated item.
3. Verify physical completion against spec: load/vehicle secured, crate integrity, navigation/telematics configured, no loose straps, chains, or tools left on the unit.
4. Confirm no damage was introduced during the job and that any pre-existing damage is noted on the order.
5. Dispatch/Order Coordinator reconciles the work order against the original customer request; confirm no line item was dropped or substituted without authorization.
6. Verify all required completion documentation is present and legible: signatures, timestamps, mileage/photos, securement checklist.
7. Supervisor performs completeness verification; classify any issue per Section 8.
8. Record the verification result, findings, and disposition in the job record before routing to final inspection (QC-012).

8. Decision Tree

Decision Tree — Job / Order Completion Verification**READING THIS TREE**

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- All work-order line items confirmed performed and matched to the original customer request.
- Load, vehicle, or crate securement verified against the applicable securement class (49 CFR 393 where applicable).
- Completion documentation present, legible, and signed.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
All work-order line items performed		
Work order reconciles to original customer request		
Load/vehicle/crate securement verified		
No new damage; pre-existing damage noted		
Installed parts/consumables match spec		
Completion documentation complete and signed		
No tools, straps, or materials left on unit		

11. KPIs

- First-pass completion verification rate $\geq 95\%$
- Jobs released to QC-012 with unresolved findings = 0
- Documentation completeness at verification $\geq 98\%$

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for TRANSPORT_SUPPORT.	Archetype Content Team

OD-021 — Delivery / Service Turnover

Estimated completion time: 15-45 minutes per turnover

Provided for general informational and operational purposes as part of the Transport Support archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

This procedure governs the controlled release of a finished job — a recovered/transported vehicle, a packed and crated item, or a completed support service — to the customer or the next party in the chain, ensuring the item or service is complete, accounted for, and formally transferred with custody responsibility clearly passed.

2. Scope

Covers the final release and turnover of completed work to the customer, the receiving carrier, or a downstream transportation equipment wholesaler, including condition confirmation, custody hand-off, and turnover documentation. Excludes loading/dispatch, which is covered under SH-014, and proof of delivery, which is covered under SH-024.

3. Responsibilities

- Operations Turnover Coordinator — verifies job completeness against the work order, conducts the pre-release condition confirmation, and executes the custody hand-off.
- Shift Supervisor (Operations) — authorizes release when holds or discrepancies exist and signs off on the turnover record.
- Billing/Release Clerk — confirms payment, lien release, or account authorization status before the item or service is released.

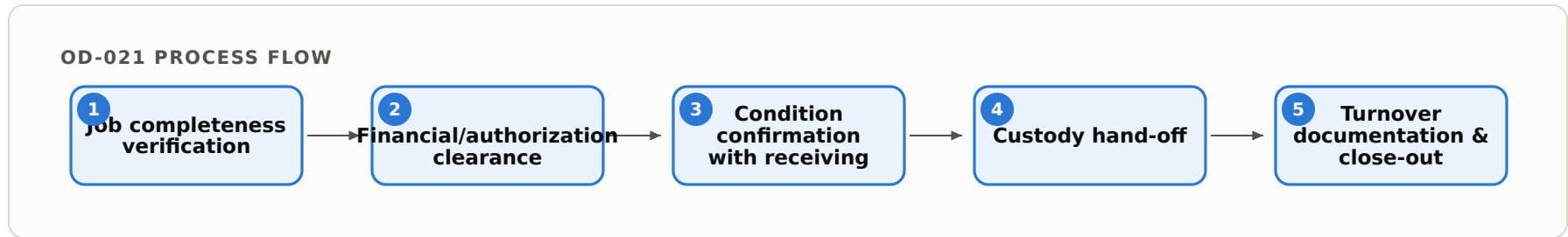
4. Required PPE & Lockout/Tagout

- Standard facility PPE; where the service line handles vehicles or crated freight during hand-off, high-visibility vest, safety footwear, and gloves.
- Not applicable — no hazardous energy is introduced during turnover; any equipment involved is already secured per SH-014 prior to this procedure.

5. Regulatory References

- 49 CFR Part 375 (transportation of household goods / service documentation), where applicable; 49 CFR Part 393 (securement condition at hand-off) where vehicles or freight are transferred; state consumer-protection and lien-release statutes governing release of towed/held property; internal Custody & Release policy applies where no sector-specific rule governs.
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

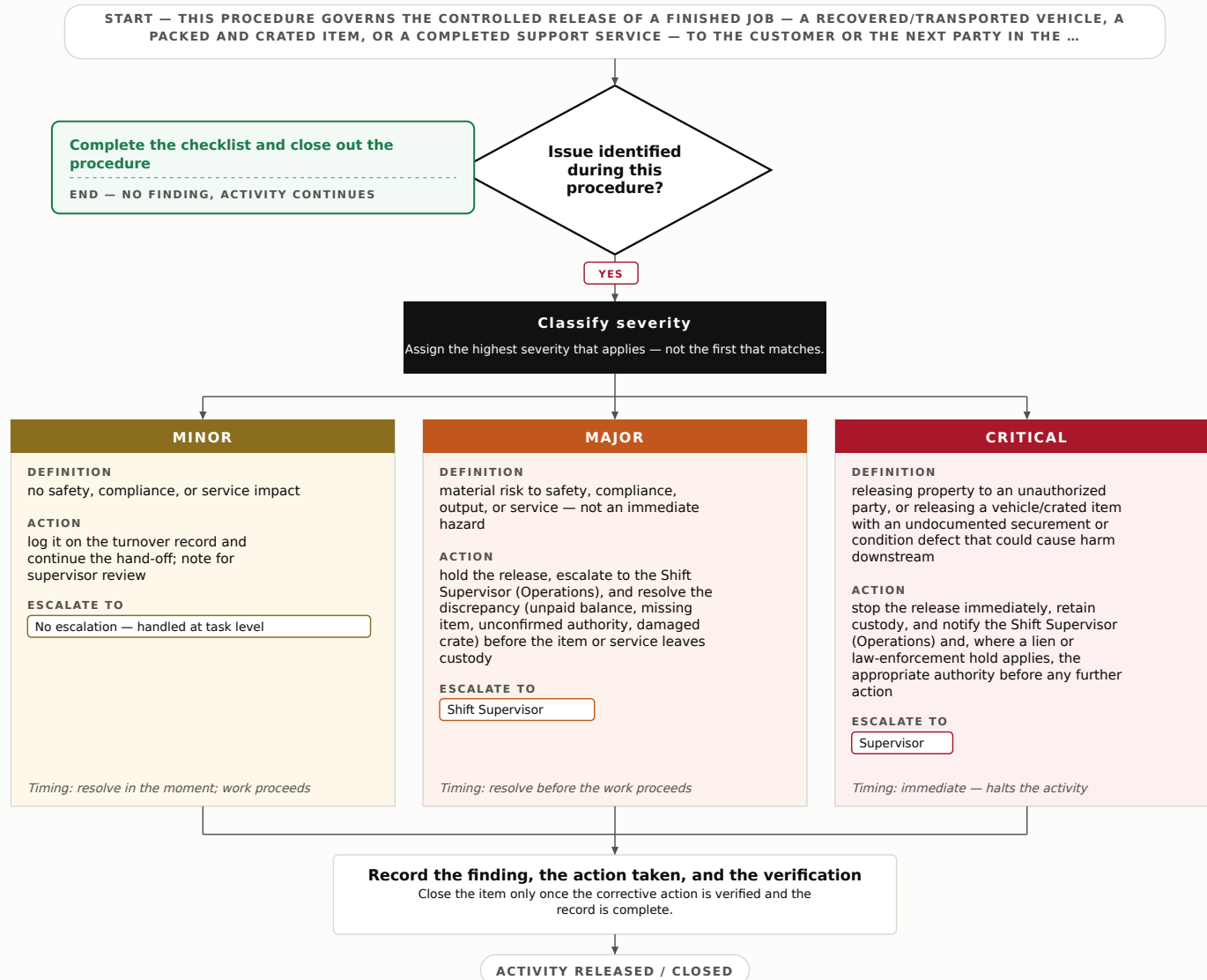


7. Step-by-Step Procedure

1. Retrieve the work order and confirm all ordered services or handling steps are marked complete and no open holds remain.
2. Verify with the Billing/Release Clerk that payment, account authorization, or applicable lien/release requirements are cleared.
3. Confirm the identity and authority of the receiving party (customer, agent, receiving carrier, or wholesaler representative) against the work order or release authorization.
4. Walk the receiving party through the finished item or service — vehicle condition, crate/package integrity and markings, or completed service scope — and note the condition jointly observed.
5. Confirm all accessories, keys, documents, or accompanying materials are present and match the work order.
6. Execute the custody hand-off: transfer physical control and confirm the receiving party accepts responsibility for the item or service.
7. Record the turnover — time, receiving party, condition notes, and any exceptions — on the turnover record; route proof-of-delivery capture to SH-024.
8. File the completed turnover record and update the job status to closed in the operations log.

8. Decision Tree

Decision Tree — Delivery / Service Turnover



READING THIS TREE

■ **No finding**

Activity stands. Complete the checklist and continue.

■ **Minor**

Handled in place at task level; no escalation.

■ **Major**

Supervisory decision required before the next stage.

■ **Critical**

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Work order confirmed complete with no open holds before hand-off begins.
- Financial/authorization clearance verified by Billing/Release Clerk.
- Receiving party identity and authority confirmed and recorded.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Work order marked complete; no open holds		
Payment / lien / account authorization cleared		
Receiving party identity and authority verified		
Item/service condition jointly confirmed with receiver		
Accessories, keys, documents accounted for		
Custody hand-off executed and accepted		
Turnover record completed and filed		

11. KPIs

- Turnovers completed with full documentation $\geq 99\%$
- Custody disputes / wrong-party releases 0 per quarter
- Average turnover cycle time ≤ 30 minutes

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for TRANSPORT_SUPPORT.	Archetype Content Team

OD-022 — Customer Communication & Status Notification

Estimated completion time: 5-20 minutes per customer update cycle; ongoing across the life of the job

Provided for general informational and operational purposes as part of the Transport Support archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To keep the customer informed of the status, changes, and completion of a transport-support job (recovery/tow, roadside or terminal support, packing/crating, or dispatch handling) so that expectations are managed, delays are disclosed promptly, and service turnover is confirmed. This protects service quality and reduces disputes at handoff to the receiving party.

2. Scope

Covers all outbound status notifications — job acceptance, ETA and dispatch, in-progress changes (delay, scope, cost), and completion/turnover — across facility-based and field-based service lines from the point of order acceptance to confirmed completion. Excludes complaint intake, which is covered under OD-023, and quality complaint investigation, which is covered under QC-021.

3. Responsibilities

- Dispatch Coordinator — issues acceptance, ETA, and dispatch notifications; updates the job record; owns the notification cadence.
- Field/Service Operator — reports on-scene status, scope or cost changes, and completion facts back to Dispatch in real time.
- Operations Supervisor — approves customer-facing notice of any material change (delay, added cost, scope change) and handles escalations.

4. Required PPE & Lockout/Tagout

- Standard facility PPE where notifications are prepared at a workstation; field operators use their assigned task PPE (high-visibility apparel where operating roadside or on an active yard).
- Not applicable — no hazardous energy involved in the notification task itself.

5. Regulatory References

- Telephone Consumer Protection Act (47 U.S.C. §227) and FCC rules (47 CFR 64.1200) governing automated/text customer contact and consent.
- FTC Telemarketing Sales Rule (16 CFR Part 310) where applicable to outbound contact.
- State consumer-protection and unfair/deceptive-practices statutes governing accuracy of quoted price, ETA, and completion representations (e.g., state towing/consumer disclosure rules where the service line operates vehicles).
- Internal policy applies where no sector-specific standard governs the content of a status notice.
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

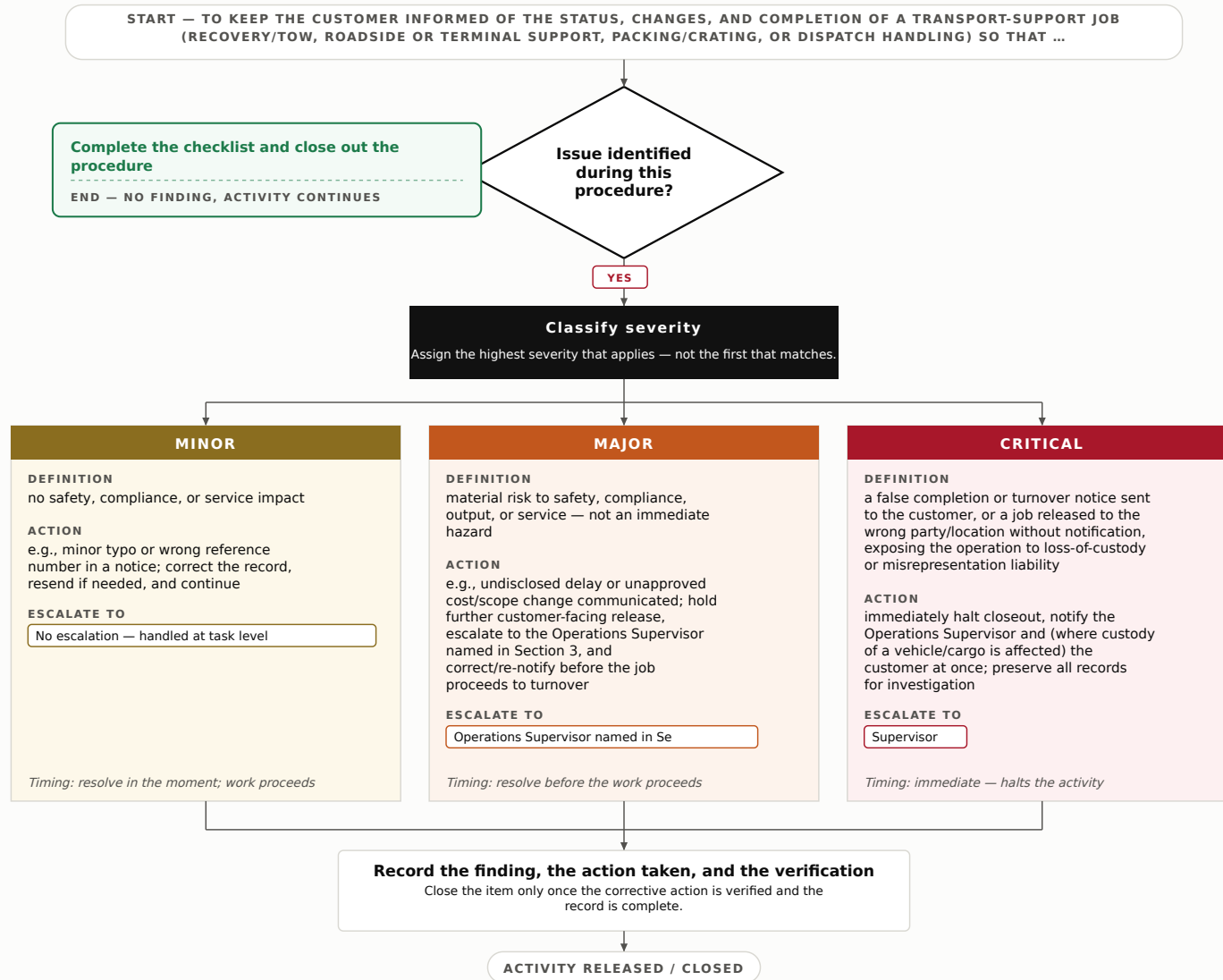


7. Step-by-Step Procedure

1. On order acceptance, confirm the customer's preferred contact method and consent to call/text; record it in the job file.
2. Issue the acceptance/ETA notification, stating job reference, expected arrival or start window, and the quoted price basis.
3. Log the notification (channel, timestamp, recipient) against the job record.
4. During the job, relay any change — delay beyond the quoted window, scope change, or cost change — from the Field/Service Operator; obtain Operations Supervisor approval before informing the customer of a material change.
5. Send the change notification promptly, restating the revised ETA, scope, or cost, and confirm the customer's acknowledgment.
6. On completion, confirm service turnover facts (location released to, condition, and — for outbound movement to equipment distributors — delivery reference per the downstream channel) and notify the customer of completion.
7. Obtain and record the customer's confirmation of receipt/turnover, or note non-response and the number of attempts.
8. Close the job record, ensuring every notification and acknowledgment is documented and retained per policy.

8. Decision Tree

Decision Tree — Customer Communication & Status Notification



READING THIS TREE

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Contact method and consent verified before first notification.
- ETA/cost/scope statements match the current job record at time of send.
- Material changes carry Operations Supervisor approval before customer release.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Customer contact method and consent recorded		
Acceptance/ETA notice issued and logged		
Each change notification approved and timestamped		
Completion/turnover notice sent		
Customer acknowledgment recorded or attempts noted		
Quoted vs. final cost/scope reconciled in record		
Job record closed and archived per retention policy		

11. KPIs

- On-time status notification (issued within defined cadence): $\geq 95\%$.
- Delay/change notices sent before the original window elapses: $\geq 98\%$.
- Completion notices with recorded customer acknowledgment: $\geq 90\%$.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for TRANSPORT_SUPPORT.	Archetype Content Team

OD-023 — Customer Feedback & Complaint Intake

Estimated completion time: 15-30 minutes per intake event

Provided for general informational and operational purposes as part of the Transport Support archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To capture, log, and route customer feedback and complaints received by a Transport Support operation — whether about dispatch, on-scene service, packing/crating handling, damage claims, billing, or driver conduct — so that every contact is recorded accurately and directed to the correct owner without loss or delay.

2. Scope

Covers first-touch receipt, verification, logging, severity classification, and routing of all inbound customer feedback and complaints across phone, email, web form, and in-person channels. Excludes root-cause quality complaint investigation, which is covered under QC-021, and corrective/preventive action, which is covered under QC-019.

3. Responsibilities

- Intake Coordinator (Operations) — receives the contact, verifies caller and job details, creates the complaint record, and performs initial severity classification.
- Operations Supervisor — reviews Major and Critical entries, assigns the responsible owner, and confirms routing hand-offs.
- Records Custodian — maintains the complaint log, enforces retention, and audits entries for completeness.

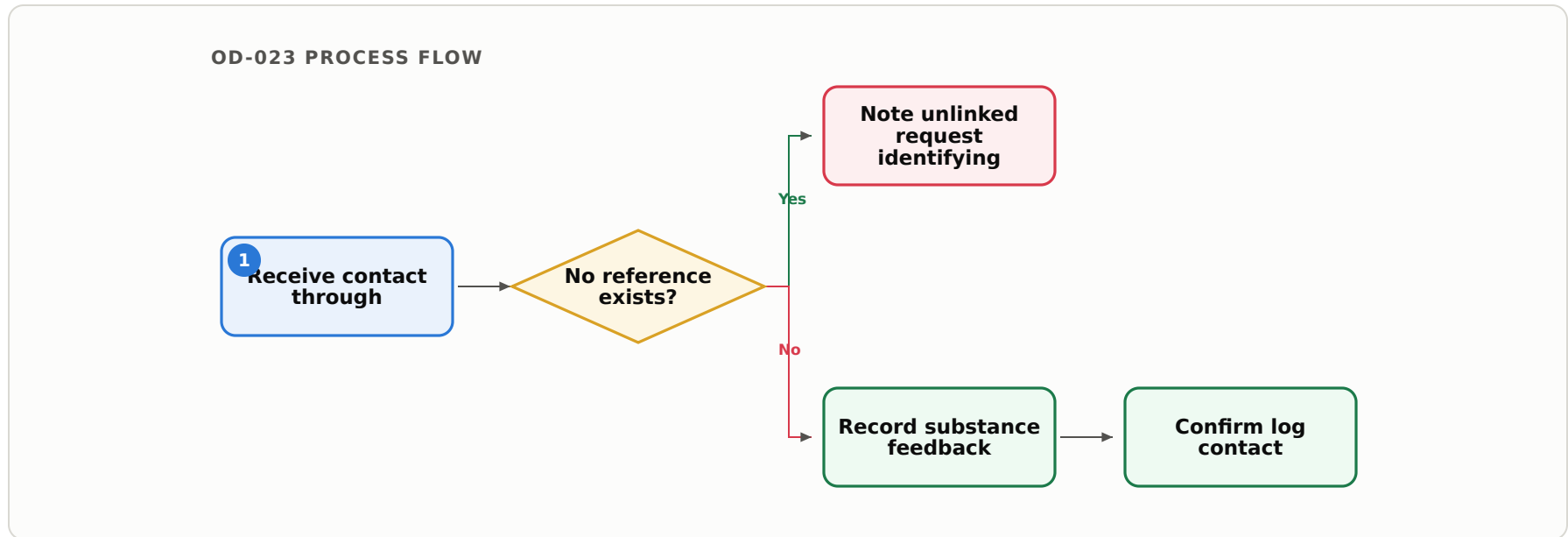
4. Required PPE & Lockout/Tagout

- Standard facility PPE only for desk-based intake; where intake occurs at a field or roadside location, high-visibility apparel per site rules applies.
- Not applicable — no hazardous energy involved in the intake activity.

5. Regulatory References

- None sector-specific to complaint intake across all members; internal policy applies as the governing frame. Applicable general regimes include FTC Act §5 (16 CFR) on unfair/deceptive practices for billing and service representations, and state consumer-protection and record-retention statutes. Where a service line performs interstate motor carrier support, FMCSA complaint-handling expectations (49 CFR) may apply as an example, not a universal frame. Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

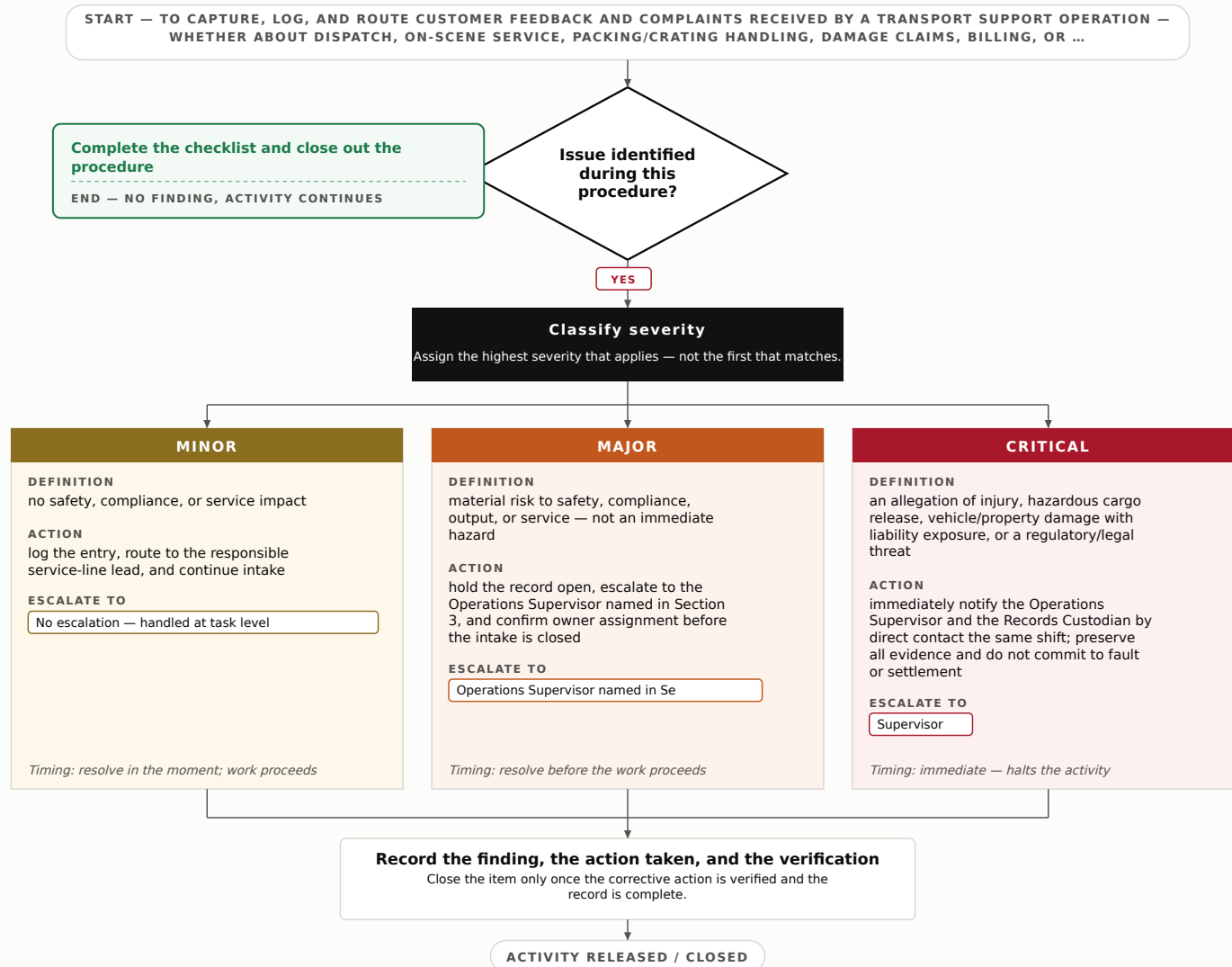


7. Step-by-Step Procedure

1. Receive the contact through the assigned channel (phone, email, web form, or in-person) and greet the customer, capturing their name and preferred callback method.
2. Verify the customer against the associated job or service reference (tow ticket, dispatch order, packing/crating work order, or invoice number); if no reference exists, note "unlinked" and request identifying details.
3. Record the substance of the feedback or complaint in the customer's own words, including date/time of the underlying service, equipment or shipment involved, and any asserted damage or delay.
4. Confirm and log contact preferences and any deadlines the customer states (e.g., insurance filing, delivery window).
5. Classify severity per Section 8 and assign the responsible owner.
6. Provide the customer an acknowledgment and a reference number for their record; state the expected next-contact timeframe without promising an outcome.
7. Route the record to the assigned owner and, for damage or defect claims tied to parts or navigation equipment, flag for hand-off to QC-021 for investigation.
8. Complete the intake fields, attach any supporting media (photos, emails), and close out the intake record with timestamp and initials.

8. Decision Tree

Decision Tree — Customer Feedback & Complaint Intake



READING THIS TREE

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every contact has a customer identity and a linked (or explicitly "unlinked") job reference.
- Complaint text is captured verbatim with underlying service date and equipment/shipment identified.
- Severity classification and assigned owner are recorded before close.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Customer name and contact method captured		
Job/service reference linked or "unlinked" noted		
Complaint substance recorded verbatim		
Severity classified and owner assigned		
Acknowledgment and reference number issued		
Supporting media/attachments filed		
Record timestamped and initialed at close		

11. KPIs

- Intake logged within 1 business hour of receipt — $\geq 95\%$.
- Complete records (all required fields) at close — $\geq 98\%$.
- Critical complaints escalated same shift — 100%.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for TRANSPORT_SUPPORT.	Archetype Content Team

Phase 5 — Oversight & continuity

OD-024 — Operational Incident Reporting & Response

Estimated completion time: 20–45 minutes per incident report; escalation windows as defined below

Provided for general informational and operational purposes as part of the Transport Support archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To provide a consistent method for reporting, classifying, and responding to operational incidents and near-misses — service disruptions, cargo or load-securement events, dispatch/routing errors, missed service windows, and property damage — so that they are captured, contained, and corrected before they recur or affect a customer or carrier.

2. Scope

Covers operational incidents and near-misses arising during transport support work — towing/recovery calls, roadside and yard support, packing/crating jobs, staging, and dispatch coordination — from first identification through documentation and corrective closure. Excludes worker safety incident reporting (injuries, exposures), which is covered under SD-018, and equipment breakdown/mechanical failure, which is covered under MD-009.

3. Responsibilities

- Operations Supervisor — owns the incident log, classifies severity, authorizes holds on affected work, and approves closure.
- Dispatch/Field Coordinator — receives first reports from field or facility staff, opens the incident record, and coordinates immediate containment.
- Operator/Field Technician — reports any incident or near-miss immediately, secures the affected load, vehicle, or work area, and supplies factual detail for the record.

4. Required PPE & Lockout/Tagout

- Standard field/facility PPE where the report is filed at the scene: high-visibility vest, gloves, and footwear per site rules; no additional PPE for the reporting task itself.
- Not applicable — the reporting and classification procedure involves no hazardous energy. Any physical securing of a load or vehicle follows the site's existing containment practice.

5. Regulatory References

- 49 CFR Part 390–393 (FMCSA — commercial motor vehicle operations, cargo securement; applicable to service lines operating regulated vehicles)
- 29 CFR 1904 (OSHA — recording criteria; incident recordkeeping obligations)
- DOT accident/incident reporting requirements where the service line operates commercial vehicles (e.g., 49 CFR 390.15 record retention)

- Internal Operations policy governs all near-miss and non-DOT operational events not captured by the above.
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

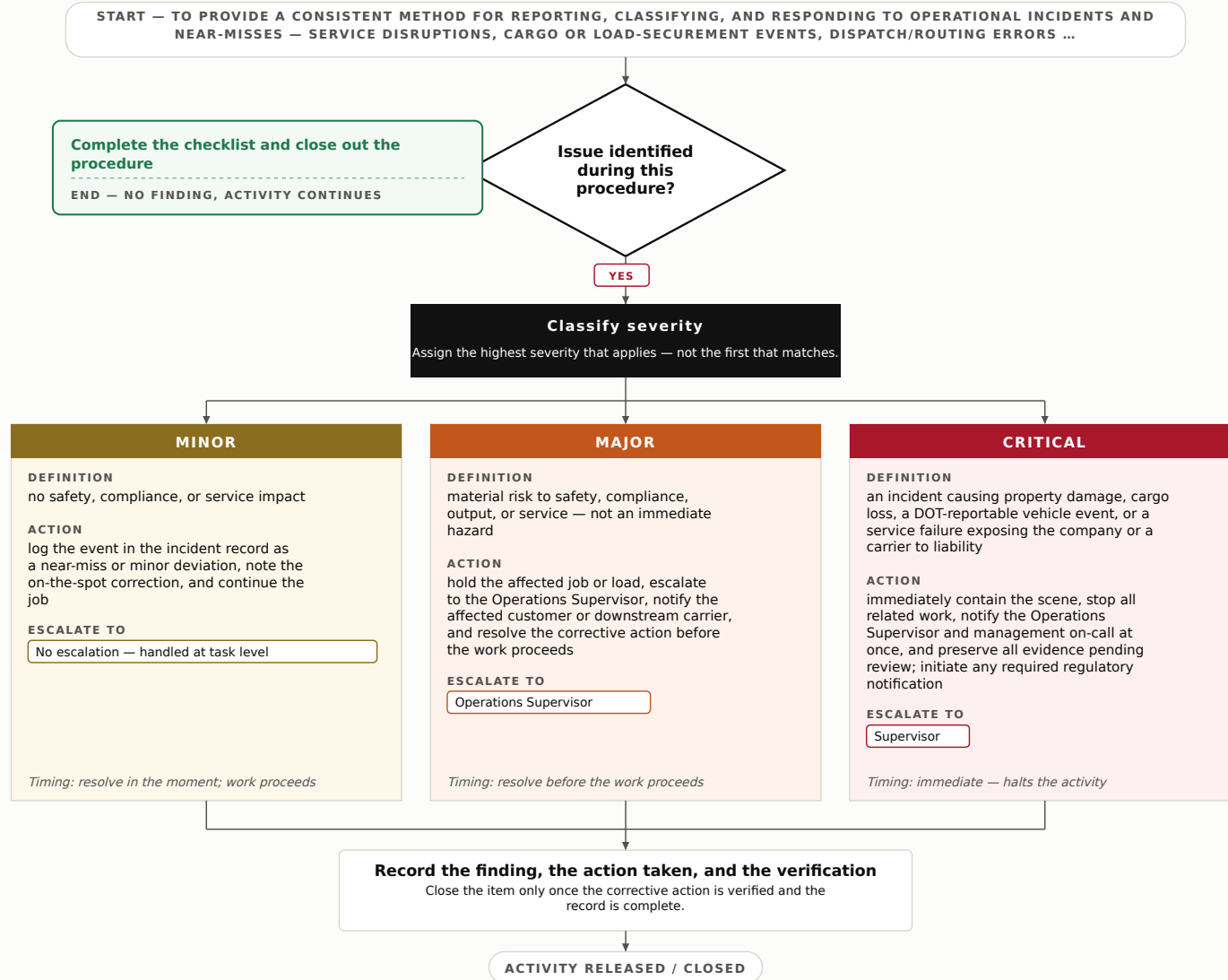


7. Step-by-Step Procedure

1. On identifying an incident or near-miss, the reporting operator immediately notifies the Dispatch/Field Coordinator by radio, phone, or in-person — never wait until end of shift.
2. Secure the affected work: stabilize the load, vehicle, crate, or staged item; mark or cordon the area; stop any dependent task until the Coordinator responds.
3. Coordinator opens an incident record with time, location, job/dispatch number, personnel present, and a factual description — no opinions or assumptions.
4. Coordinator captures supporting evidence: photos, dispatch logs, load/securement notes, and any customer or carrier communication tied to the affected job.
5. Operations Supervisor classifies severity per the Decision Tree (Section 8) and authorizes the appropriate hold or continuation.
6. Execute the response: notify the customer or downstream carrier where a delivery or service handoff is affected, and record all notifications with timestamps.
7. Assign a corrective action and owner; verify it is complete before the affected work resumes or the job is released.
8. Supervisor reviews the completed record, confirms all fields and evidence are attached, and closes the incident in the log with a closure timestamp.

8. Decision Tree

Decision Tree — Operational Incident Reporting & Response



READING THIS TREE

No finding

Activity stands. Complete the checklist and continue.

Minor

Handled in place at task level; no escalation.

Major

Supervisory decision required before the next stage.

Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every reported incident and near-miss has an open record within the shift it was identified.
- Severity classification recorded and authorized by the Operations Supervisor.
- All customer/carrier notifications logged with timestamps where a service handoff was affected.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Incident/near-miss reported same shift as identified		
Affected load, vehicle, or work area secured		
Record contains time, location, job number, personnel		
Supporting evidence (photos/logs) attached		
Severity classified and authorized		
Customer/carrier notified where handoff affected		
Corrective action assigned and verified complete		

11. KPIs

- Same-shift reporting rate $\geq 98\%$ of identified incidents/near-misses
- Median time from report to classification ≤ 2 hours
- Corrective actions closed within 5 business days $\geq 90\%$

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for TRANSPORT_SUPPORT.	Archetype Content Team

OD-025 — Emergency & Business Continuity Readiness Check

Estimated completion time: 2-4 hours

Provided for general informational and operational purposes as part of the Transport Support archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

This procedure confirms that a Transport Support operation — whether dispatching field service units, staffing a support desk, or running a packing/crating floor — can respond to a disruption (weather, power loss, communications outage, facility loss, or staffing shortfall) and resume core service to downstream customers. It verifies readiness, not the drills or backup systems themselves.

2. Scope

Covers the periodic verification of continuity documentation, contact trees, alternate-site/alternate-route arrangements, and resumption sequencing for all Operations service lines. Excludes emergency drills and live response exercises (see SD-015, SD-016) and backup power systems (see ED-027); this module only confirms those elements exist, are current, and are referenced correctly.

3. Responsibilities

- Operations Manager — owns the continuity plan, approves recovery priorities, and signs off on the readiness check.
- Dispatch/Service Coordinator — verifies contact trees, alternate-route/alternate-site data, and customer-notification paths are current.
- Records/Compliance Clerk — confirms documentation is versioned, accessible offline, and retained per policy.

4. Required PPE & Lockout/Tagout

- Standard facility PPE where the check involves walking active yard, dock, or crating areas (high-visibility vest, safety footwear).
- Not applicable — this is a documentation and readiness review with no hazardous energy involved.

5. Regulatory References

- 29 CFR 1910.38 (Emergency Action Plans) and 29 CFR 1910.165 (Employee Alarm Systems) — apply to all fixed and field employers in the span.
- 29 CFR 1904 (Recordkeeping) for injury/incident capture during disruptions.
- Where the service line operates commercial motor vehicles, 49 CFR (FMCSA) contingency and out-of-service provisions apply (e.g., emergency route/hours guidance) — example only, not the governing frame.
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

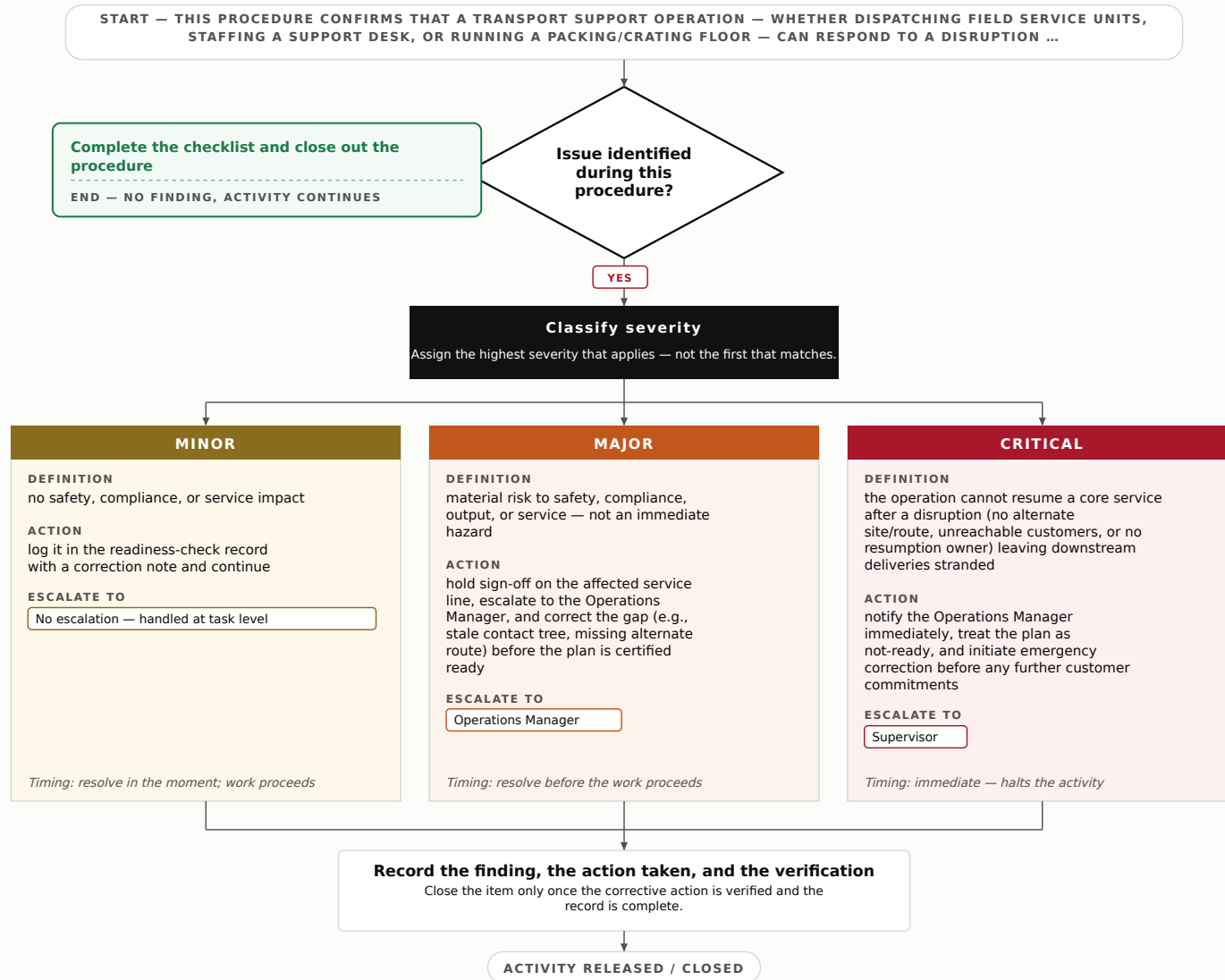


7. Step-by-Step Procedure

1. Retrieve the current Business Continuity Plan and confirm its revision date is within the review interval (no older than 12 months).
2. Verify the emergency contact tree — Operations Manager, Coordinators, key drivers/crew, customers, and critical suppliers — against live records; flag any stale numbers.
3. Confirm customer-notification paths (downstream Transportation Equipment Wholesalers and service accounts) can be reached if primary communications fail; note the fallback method for each channel.
4. Verify alternate-site or alternate-route arrangements exist for each core service line (staging yard, packing floor, dispatch console) and that access instructions are documented.
5. Confirm the resumption sequence lists core services in priority order with an assigned owner and a target resume window for each.
6. Confirm that references to drills (SD-015/SD-016) and backup power (ED-027) point to current, existing documents — do not re-test them here.
7. Run one tabletop walkthrough of a single disruption scenario against the plan to confirm the steps are actionable and no gap blocks resumption.
8. Record all findings, assign corrective owners for any gaps, and file the completed checklist.

8. Decision Tree

Decision Tree — Emergency & Business Continuity Readiness Check



READING THIS TREE

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Continuity plan revision date within review interval and version-controlled.
- 100% of contact-tree entries verified reachable or flagged for update.
- Each core service line has a documented alternate and a named resumption owner.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Continuity plan current & version-controlled		
Contact tree verified reachable		
Customer-notification fallback documented		
Alternate site/route documented per service line		
Resumption sequence prioritized with owners		
Drill & backup-power references current (SD-015/016, ED-027)		
Tabletop walkthrough completed without blocking gap		

11. KPIs

- Readiness check completed on schedule $\geq$ 95% of review cycles.
- Contact-tree accuracy $\geq$ 98% verified entries.
- Critical readiness gaps closed within 5 business days: 100%.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for TRANSPORT_SUPPORT.	Archetype Content Team

OD-026 — Regulatory, License & Permit Currency Verification

Estimated completion time: 2-4 hours per verification cycle (quarterly, or on renewal-driven triggers)

Provided for general informational and operational purposes as part of the Transport Support archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

This procedure confirms that all operating licenses, permits, and registrations required for the transport support operation are current, valid, and on file — so that no service line performs work under a lapsed, suspended, or missing authorization.

2. Scope

Covers verification of currency for business operating licenses, transportation/carrier registrations, jurisdictional operating permits, and any oversize/overweight or wrecker-service authorizations held by the operation. Excludes safety regulatory compliance, which is covered under SD-028, and permit-to-work authorization, which is covered under MD-007.

3. Responsibilities

- Operations Compliance Coordinator — maintains the license/permit register, runs the verification cycle, and initiates renewals before expiry.
- Operations Supervisor — reviews findings, authorizes holds on any service line lacking current authorization, and signs off on closeout.
- Records Custodian — files verified certificates and confirmations, and preserves the evidence trail for audit.

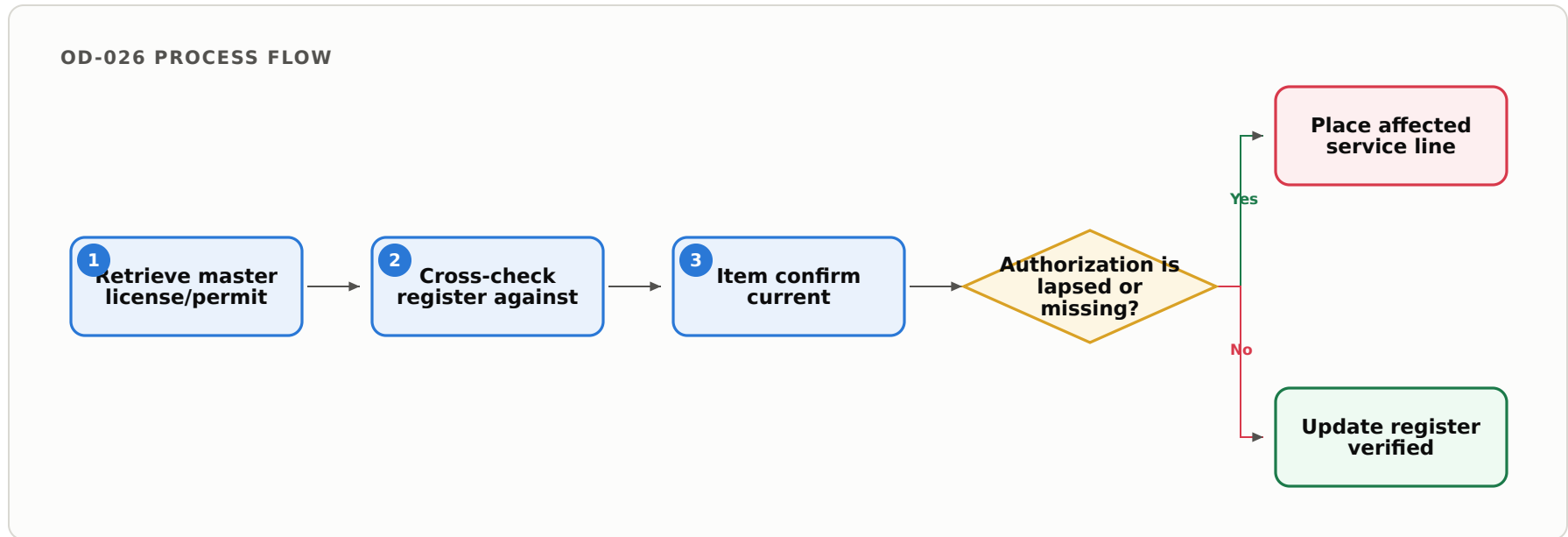
4. Required PPE & Lockout/Tagout

- Standard facility PPE if entering operational areas to inspect posted permits or in-vehicle registration documents; otherwise none for the administrative task.
- Not applicable — no hazardous energy involved.

5. Regulatory References

- USDOT / FMCSA operating authority and registration where the operation transports property in interstate commerce (49 CFR Parts 365, 390); state motor carrier / intrastate registration and operating permits; state and local business operating licenses; Unified Carrier Registration (UCR) where applicable. Member-specific example: state wrecker/tow-service permits (e.g., for towing lines) or oversize/overweight movement permits (e.g., for specialized crating/transport support). Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

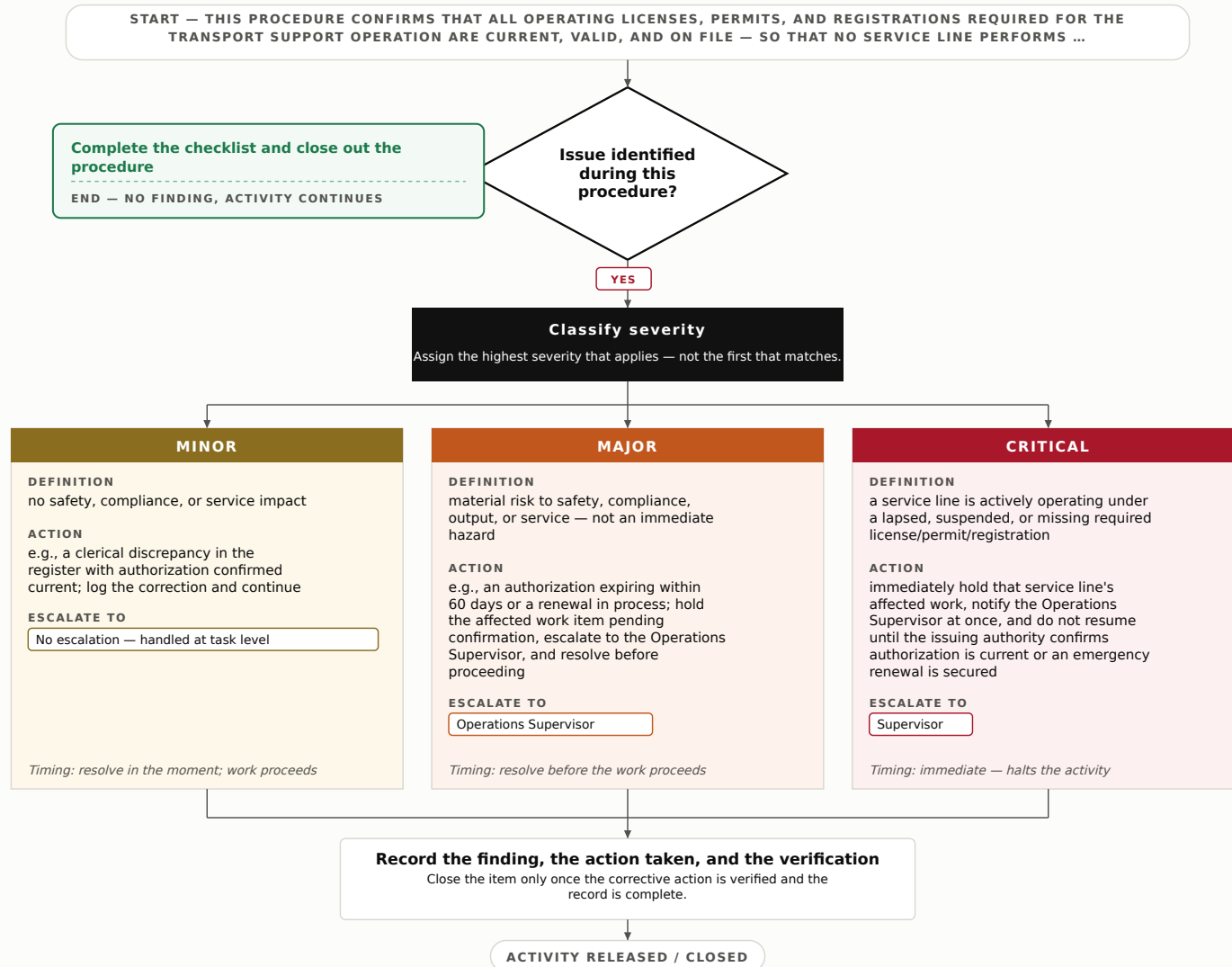


7. Step-by-Step Procedure

1. Retrieve the master license/permit register listing every operating license, carrier registration, and jurisdictional permit held, with issuing authority and expiry date.
2. Cross-check the register against actual authorization activity across every active service line to confirm no required authorization is missing from the register.
3. For each item, confirm current status directly with the issuing authority (agency portal, license lookup, or written confirmation) — do not rely on the paper certificate alone.
4. Verify expiry dates and flag any item expired, suspended, or due to expire within the next 60 days.
5. Confirm displayed/carried copies match the verified record (posted business license; in-vehicle registration and operating credentials where the service line operates vehicles).
6. For any flagged item, initiate the renewal or reinstatement action and record the submission date and reference number.
7. Where an authorization is lapsed or missing, place the affected service line on hold per Section 8 until authorization is confirmed current.
8. Update the register with verified status and next-review date, and file all confirmations with the Records Custodian.

8. Decision Tree

Decision Tree — Regulatory, License & Permit Currency Verification



READING THIS TREE

No finding

Activity stands. Complete the checklist and continue.

Minor

Handled in place at task level; no escalation.

Major

Supervisory decision required before the next stage.

Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every required authorization appears in the register with a verified issuing-authority status.
- All in-service authorizations confirmed current with no undocumented lapses.
- Renewal actions initiated for every item within the 60-day expiry window.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Master register complete and matches active service lines		
Each authorization status verified with issuing authority		
No expired or suspended authorizations in service		
Items within 60-day window have renewals initiated		
Displayed/carried copies match verified records		
Confirmations filed with Records Custodian		
Next-review date set on register		

11. KPIs

- Authorization currency rate: 100% of in-service authorizations verified current.
- Renewal lead time: renewals initiated $\geq$ 30 days before expiry, 100% of items.
- Verification cycle completion: full cycle completed on schedule (quarterly), 100%.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for TRANSPORT_SUPPORT.	Archetype Content Team

OD-027 — Operational Risk Review

Estimated completion time: 3-5 hours per review cycle (quarterly)

Provided for general informational and operational purposes as part of the Transport Support archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To conduct a periodic, structured review of operational risks and their associated controls across the Transport Support service lines (towing/recovery, road-transport support, packing and crating, and other transportation support) so that identified risks are current, control ownership is confirmed, and residual exposure remains within tolerance.

2. Scope

Covers the periodic identification, rating, and control-adequacy review of operational risks affecting dispatch, field service, equipment readiness, cargo/vehicle handling, and records for all service lines. Excludes safety hazard/risk assessment (see SD-004) and quality preventive action (see QC-020); this procedure reviews the operational risk register and control status only.

3. Responsibilities

- Operations Manager — owns the risk register, chairs the review, approves risk ratings and control-owner assignments, and authorizes escalation.
- Dispatch/Field Supervisor — provides operational input on service-line risks (vehicle operation, cargo handling, customer sites), verifies control status, and executes assigned corrective routing.
- Compliance/Records Coordinator — maintains review documentation, tracks open actions to closure, and confirms retention of prior review records.

4. Required PPE & Lockout/Tagout

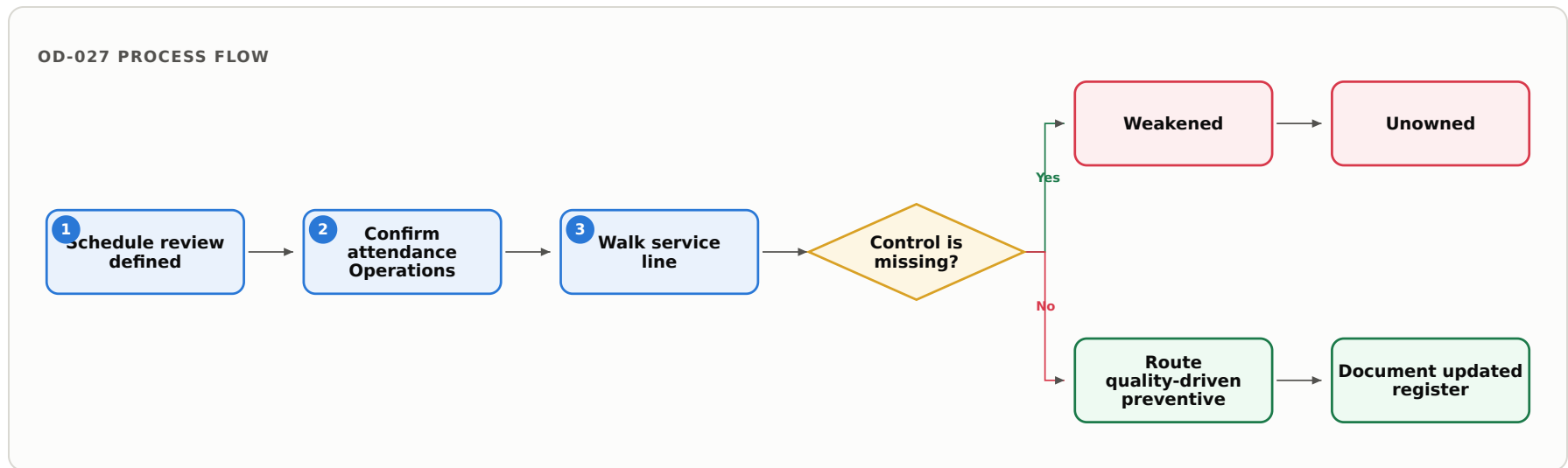
- Standard facility PPE if the review includes a walk-through of yard, bay, or staging areas (hi-vis vest, safety footwear); office-based review requires none.
- Not applicable — this is an administrative review task involving no hazardous energy. Any equipment inspection referenced is documentary only.

5. Regulatory References

- 49 CFR Part 390–396 (FMCSA — general motor carrier operations, records, and vehicle-related duties applicable where the service line operates commercial motor vehicles)
- 29 CFR 1910 (OSHA General Duty and general-industry recordkeeping obligations applicable to all covered employers)
- 29 CFR 1904 (OSHA recording and reporting of occupational injuries and illnesses)

- Applicable state DOT / motor carrier and business-licensing requirements for the state(s) of operation; internal Operational Risk Management Policy governs where no sector-specific standard applies.
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

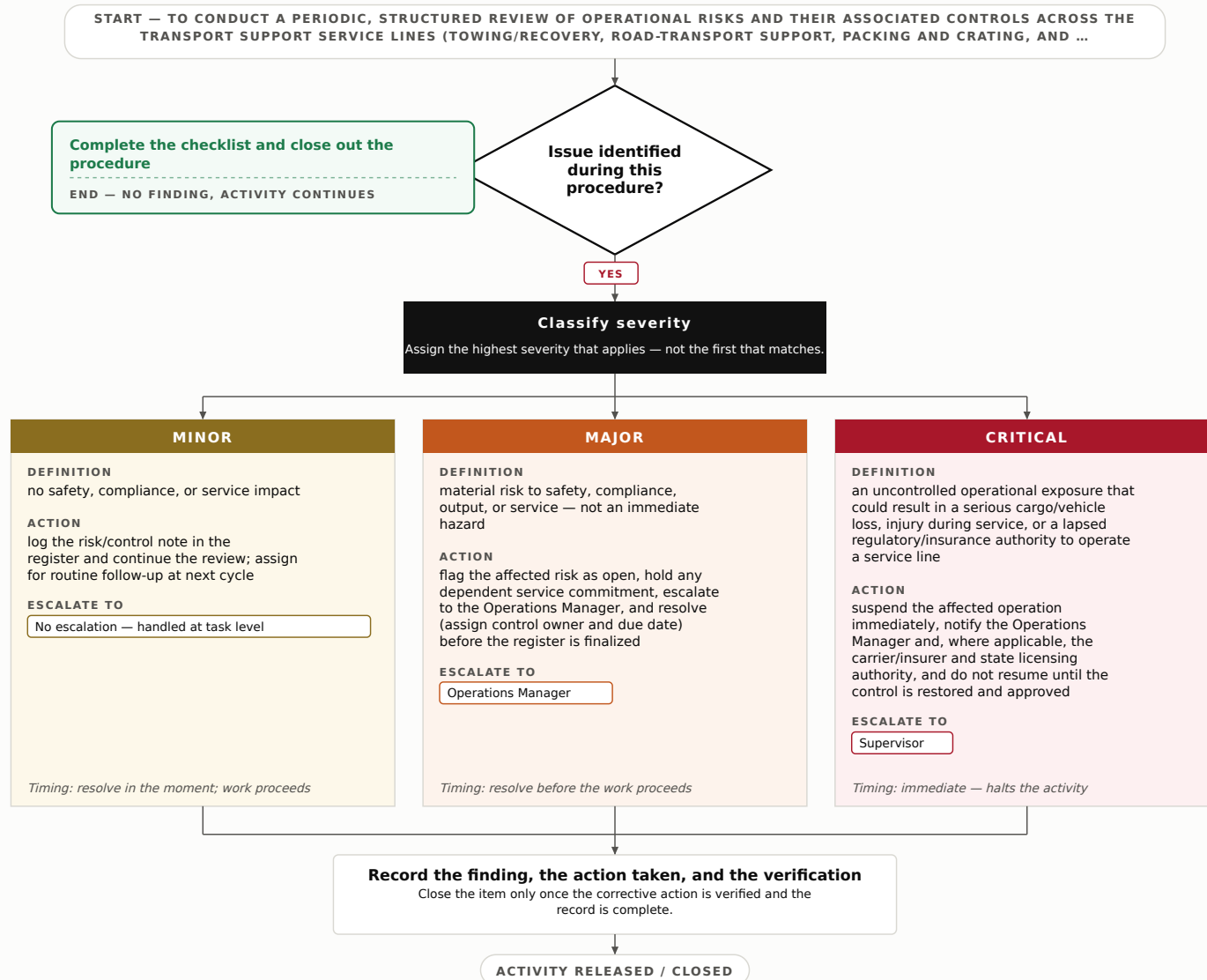


7. Step-by-Step Procedure

1. Schedule the review at the defined interval (quarterly minimum) and pull the current operational risk register and the prior review's open-action list.
2. Confirm attendance of the Operations Manager, Dispatch/Field Supervisor, and Compliance/Records Coordinator, plus any service-line lead relevant to the cycle.
3. Walk each service line (towing/recovery, road-transport support, packing and crating, other support) and update the inventory of operational risks — dispatch failures, vehicle/equipment downtime, cargo or vehicle damage during handling, contract/insurance lapses, records gaps.
4. Rate each risk for likelihood and consequence (safety, compliance, output, service) using the standing scale; do not re-perform hazard assessment — reference SD-004 for any safety hazard identified.
5. For each material risk, confirm the assigned control, verify the control owner, and assess whether the control remains adequate and in effect.
6. Where a control is missing, weakened, or unowned, log a corrective action with an owner and due date; classify per the Decision Tree.
7. Route any quality-driven preventive action to QC-020; do not author it here.
8. Document the updated register, ratings, control decisions, and action list; obtain Operations Manager approval and archive per retention requirements.

8. Decision Tree

Decision Tree — Operational Risk Review



READING THIS TREE

■ **No finding**

Activity stands. Complete the checklist and continue.

■ **Minor**

Handled in place at task level; no escalation.

■ **Major**

Supervisory decision required before the next stage.

■ **Critical**

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every service line has a current, dated entry in the risk register.
- Each material risk has a named control and a confirmed control owner.
- All prior-cycle open actions are reviewed for closure status.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Prior review register and open-action list retrieved		
All service lines reviewed and risks updated		
Likelihood/consequence ratings applied consistently		
Each material risk has an assigned, verified control owner		
Corrective actions logged with owner and due date		
Safety hazards routed to SD-004; quality actions to QC-020		
Updated register approved and archived per retention rule		

11. KPIs

- Review completed on schedule: 100% of scheduled cycles.
- Open actions closed by due date: $\geq 90\%$.
- Material risks with a confirmed control owner: 100%.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for TRANSPORT_SUPPORT.	Archetype Content Team

Phase 6 — Performance, records & close

OD-028 — Operational KPI Review

Estimated completion time: 60-120 minutes per review cycle

Provided for general informational and operational purposes as part of the Transport Support archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

Establish a consistent method for reviewing operating performance — dispatch response, service completion, asset availability, and on-time turnover — against defined targets so that Operations can detect trends, correct shortfalls, and sustain service reliability across all Transport Support service lines.

2. Scope

Covers the periodic review of operations-level performance measures for the service line, including response, throughput, availability, and completion metrics common to towing, road-transport support, packing/crating, and other transport support work. Excludes department-specific KPI reviews for maintenance, quality control, and sales/service-desk, which are owned by MD-030, QC-030, and SD-030 respectively; scope here is limited to operations measures.

3. Responsibilities

- Operations Supervisor — owns the review, validates data integrity, and signs off findings.
- Dispatch / Coordination Lead — supplies job-level timing, volume, and completion data for the period under review.
- Operations Analyst (or designated data steward) — compiles KPI worksheet, flags variances against target, and logs corrective actions.

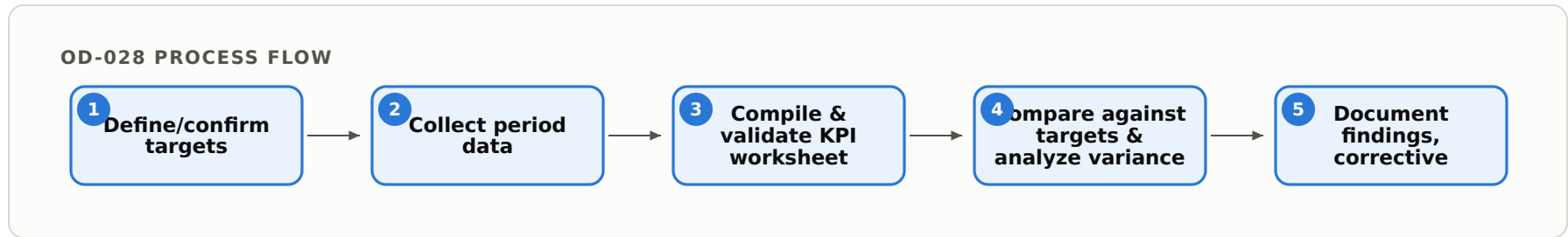
4. Required PPE & Lockout/Tagout

- Standard facility PPE if the review is conducted on the operations floor or yard (high-visibility vest, closed-toe footwear); none required for office-based review.
- Not applicable — no hazardous energy involved; this is an administrative review task.

5. Regulatory References

- None sector-specific govern KPI review itself; internal Operations policy is the governing basis. Data feeding the KPIs may derive from records maintained under general obligations applicable to all members, e.g., DOT/FMCSA hours-of-service and driver/vehicle records where the service line operates vehicles (49 CFR Parts 390-396), OSHA general recordkeeping (29 CFR 1904) for injury/illness measures, and customer-contract service-level terms. Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

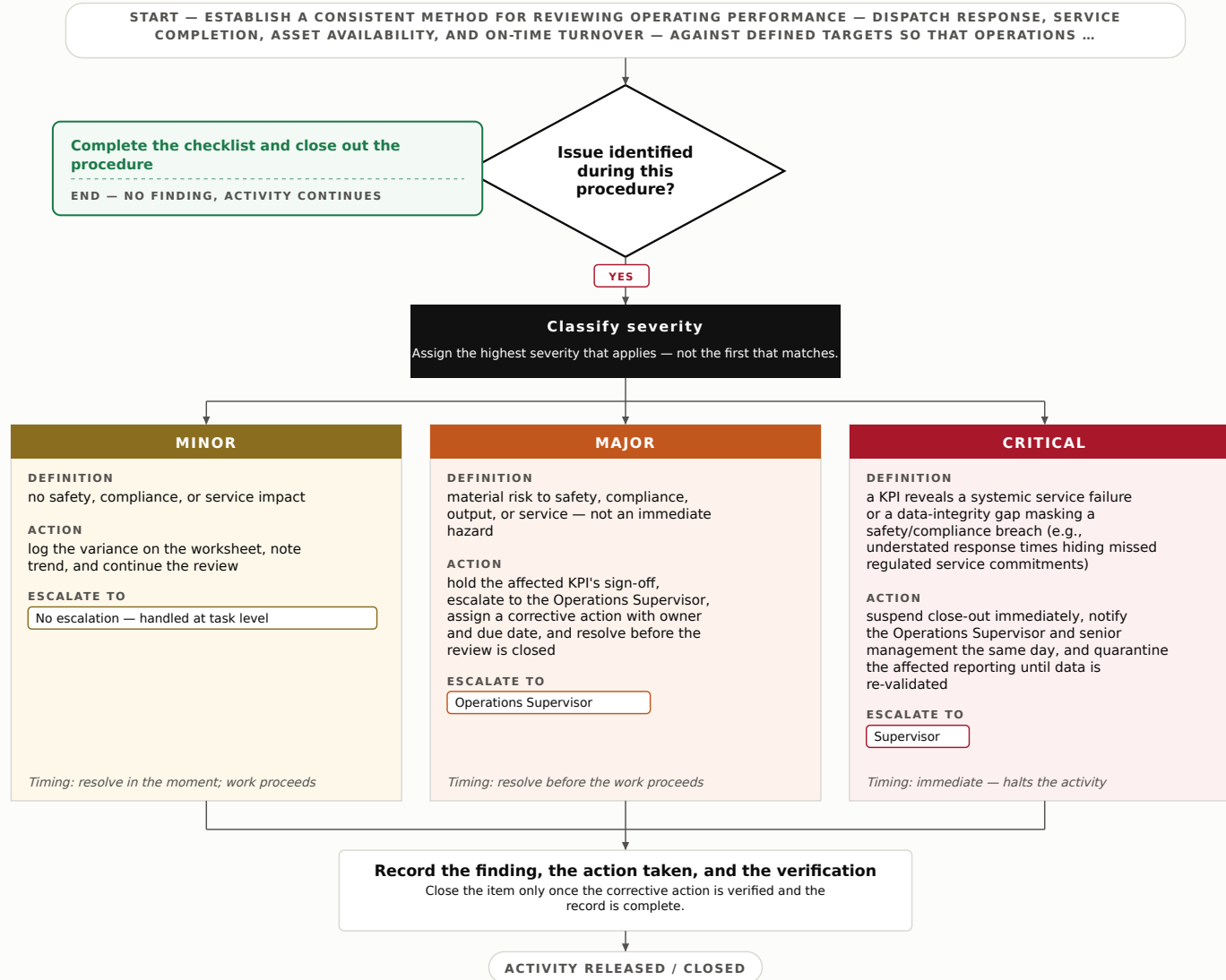


7. Step-by-Step Procedure

1. Confirm the review period and the current approved target values for each operations KPI from the master KPI definition sheet.
2. Collect source data from dispatch logs, job/work-order records, asset availability logs, and completion timestamps for the period.
3. Verify data integrity — check for missing jobs, duplicate entries, and open work orders that distort counts; reconcile against total job volume.
4. Compile each KPI on the review worksheet and calculate actual performance to the defined formula and unit.
5. Compare each actual value against its target; flag any KPI outside tolerance and calculate the variance.
6. Analyze flagged variances for root cause (staffing, asset downtime referred per MD-030, demand spikes, process gaps) without duplicating other departments' reviews.
7. Assign corrective actions with owners and due dates for each shortfall; note carryover items from prior cycles.
8. Document the completed worksheet, findings, and actions; obtain Supervisor verification and archive per internal retention policy.

8. Decision Tree

Decision Tree — Operational KPI Review



READING THIS TREE

No finding

Activity stands. Complete the checklist and continue.

Minor

Handled in place at task level; no escalation.

Major

Supervisory decision required before the next stage.

Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every KPI traces to a defined formula, source, and current approved target.
- Source data reconciled to total job volume with no unexplained gaps.
- Each flagged variance has a documented root cause and assigned corrective action.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Review period and target values confirmed against master sheet		
All source data collected and reconciled to job volume		
Data integrity checks completed (no duplicates/missing)		
Each KPI calculated to defined formula		
Variances flagged and root-caused		
Corrective actions assigned with owners and dates		
Findings documented and archived		

11. KPIs

- Average dispatch-to-arrival / service response time $\leq$ target defined in contract or $\leq$ 45 minutes where none specified
- Job/service completion rate $\geq$ 97% of accepted jobs completed within committed window
- Operational asset availability (fleet/equipment ready-for-service) $\geq$ 95% of scheduled operating hours

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for TRANSPORT_SUPPORT.	Archetype Content Team

OD-029 — Operational Records Retention & Documentation Audit

Estimated completion time: 3-5 hours per audit cycle (quarterly recommended)

Provided for general informational and operational purposes as part of the Transport Support archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To confirm that operational records — dispatch logs, service tickets, driver/operator daily records, vehicle and equipment usage logs, packing/crating manifests, billing and lien documentation, and hours-of-service data — are complete, accurate, and retained for the required period so the operation can demonstrate compliance and reconstruct any past job on demand.

2. Scope

Covers the identification, completeness/accuracy review, and retention verification of operational records generated by Transport Support service lines (towing calls, road-transport support activities, packing/crating jobs, and other transportation support work). Excludes quality records (see QC-029), safety records (see SD-029), and HR/personnel records (see HR-029), which are audited under their respective modules.

3. Responsibilities

- Operations Records Custodian — maintains the master record index, executes the audit, files findings.
- Operations Supervisor — reviews audit results, authorizes disposition of deficient records, signs off.
- Dispatch/Service Lead — supplies source records (tickets, logs, manifests) and corrects clerical gaps at source.

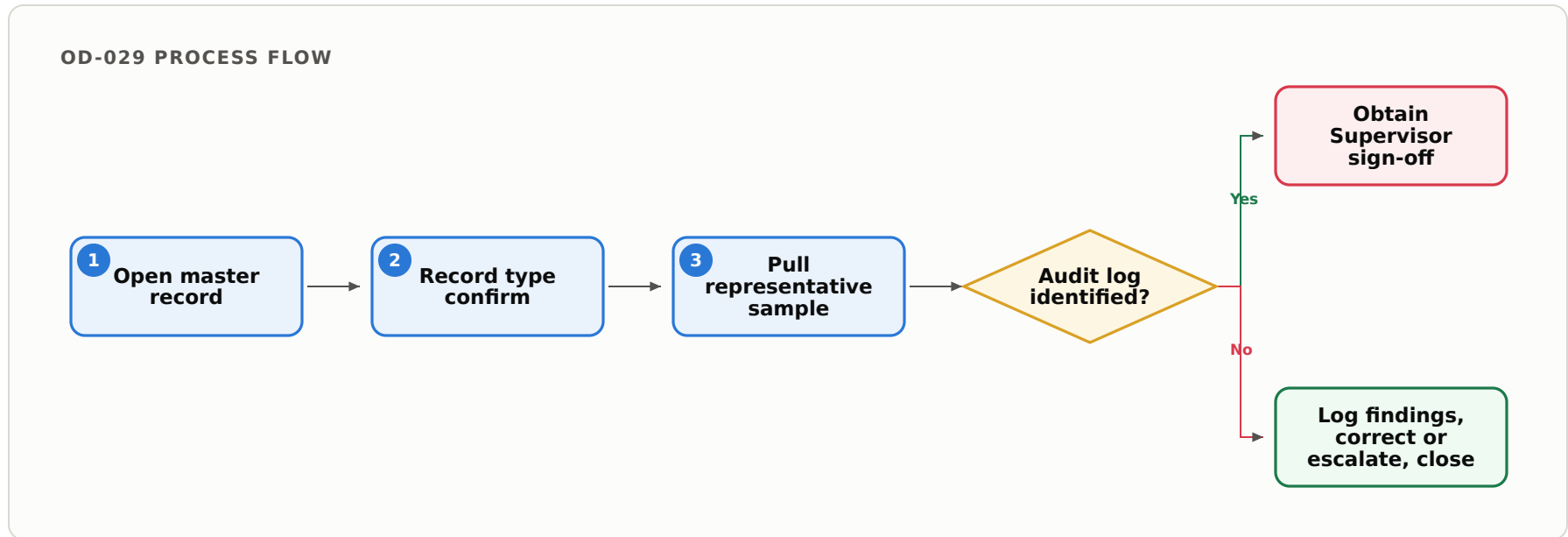
4. Required PPE & Lockout/Tagout

- Standard facility/office PPE only; no additional PPE required for records review.
- Not applicable — no hazardous energy involved.

5. Regulatory References

- 49 CFR Part 379 (Preservation of Records) and 49 CFR Part 395 (Hours of Service records / ELD data), where the service line operates commercial motor vehicles.
- 49 CFR 390.31 (retention of required records/documents) for motor carrier support operations.
- IRS 26 CFR §1.6001-1 (retention of business/financial records) — applies to every member.
- Applicable state record-retention and towing/lien documentation statutes (e.g., state-mandated tow-ticket and vehicle-lien retention periods, where the service line performs towing).
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

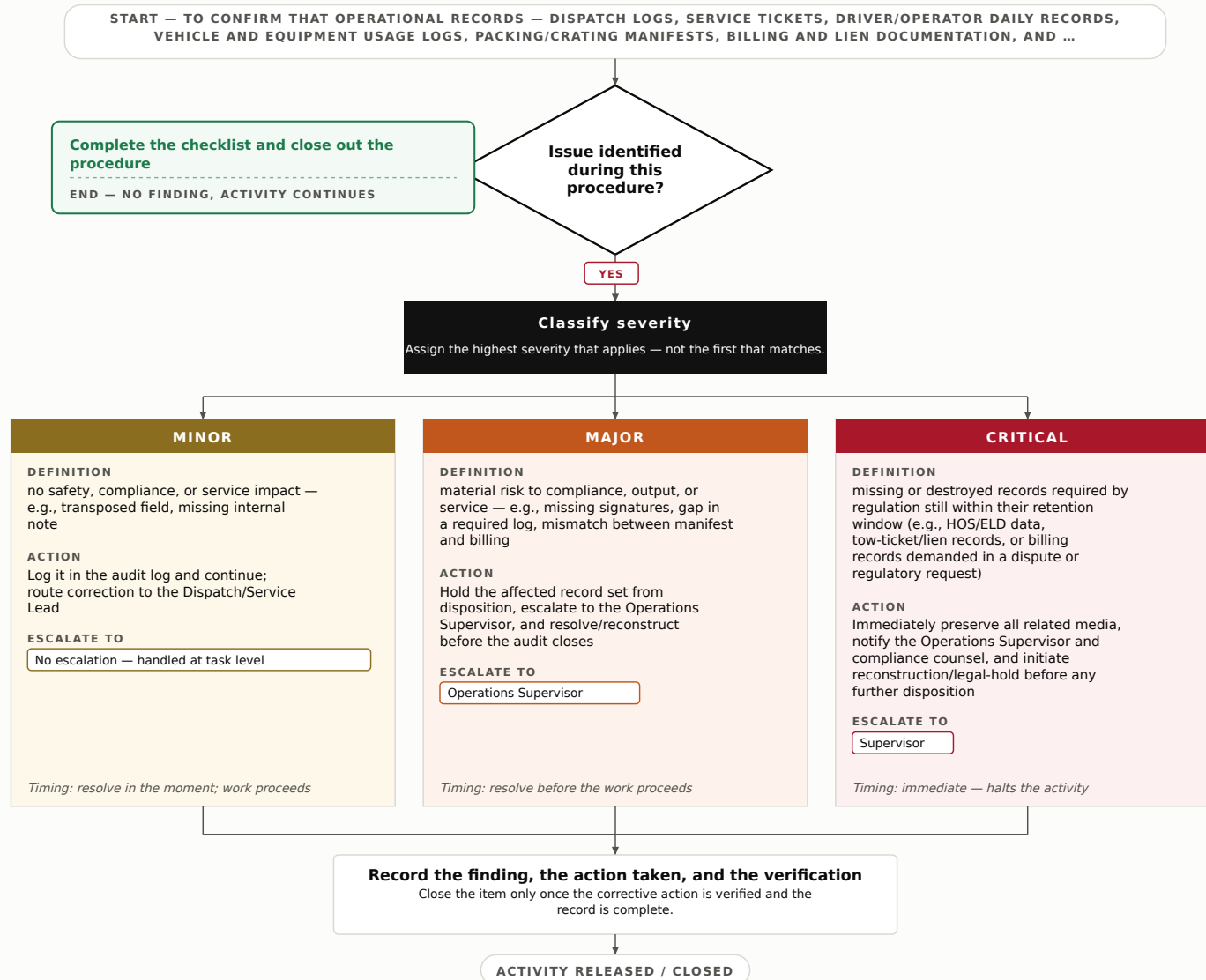
6. Process Flow



7. Step-by-Step Procedure

1. Open the master record index; list every operational record type in scope (dispatch/call logs, service tickets, operator daily logs, equipment/vehicle usage logs, packing/crating manifests, billing/lien records, ELD/HOS data where applicable).
2. For each record type, confirm the required retention period from Section 5 references and internal policy; note the retention clock start (job close date, invoice date, or vehicle release date).
3. Pull a representative sample (minimum 10% or 10 records per type, whichever is greater) spanning the current retention window.
4. Verify completeness: each record carries date, job/call ID, operator/driver name, service line, and required signatures or electronic authorizations.
5. Verify accuracy: cross-check sampled records against a second source (dispatch log vs. service ticket, manifest vs. billing) for matching job IDs, dates, and amounts.
6. Verify retention and storage integrity: confirm records within the retention window are present, legible, and backed up; confirm records past retention are dispositioned per policy, not prematurely destroyed.
7. Correct clerical gaps at source with the Dispatch/Service Lead; classify unresolved issues per Section 8.
8. Record all findings, corrections, and sample coverage in the audit log; obtain Supervisor sign-off.

8. Decision Tree

Decision Tree — Operational Records Retention & Documentation Audit**READING THIS TREE**■ **No finding**

Activity stands. Complete the checklist and continue.

■ **Minor**

Handled in place at task level; no escalation.

■ **Major**

Supervisory decision required before the next stage.

■ **Critical**

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every in-scope record type is represented in the audit sample.
- Retention period is documented and correct for each record type.
- Completeness and accuracy cross-checks completed with mismatches logged.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Master record index current and complete		
Retention periods documented per record type		
Sample coverage $\geq 10\%$ / 10 records per type		
Required fields/signatures present on sampled records		
Cross-source accuracy check completed		
Records within window present, legible, backed up		
Past-retention disposition compliant (no premature destruction)		

11. KPIs

- Record completeness rate $\geq 98\%$ of sampled records.
- Cross-source accuracy match rate $\geq 99\%$.
- Retention compliance (required records available within window) = 100%.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for TRANSPORT_SUPPORT.	Archetype Content Team

OD-030 — End-of-Shift / End-of-Day Operations Closeout

Estimated completion time: 30-60 minutes

Provided for general informational and operational purposes as part of the Transport Support archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To formally close the operating period by securing equipment and premises, reconciling revenue and job records, documenting the day's activity, and preparing an accurate account for the incoming period so that no dispatch, storage, or billing obligation is left untracked.

2. Scope

Covers the end-of-shift/end-of-day closeout of an Operations period at a Transport Support operation: securing yard/vehicles/equipment, reconciling job tickets and payments, completing daily logs, and locking down records and premises. Excludes shift-start/opening activities (see OD-001) and the person-to-person shift handover briefing (see OD-002).

3. Responsibilities

- Shift Supervisor (Operations) — owns the closeout, verifies reconciliation, authorizes securing of premises, signs off the daily record.
- Dispatcher / Operations Coordinator — reconciles job tickets, dispatch board, and open-job list; flags incomplete or open service records.
- Operator / Field Technician (where the service line operates vehicles or handles stored property) — returns and secures equipment, submits completed job paperwork and fuel/mileage entries.

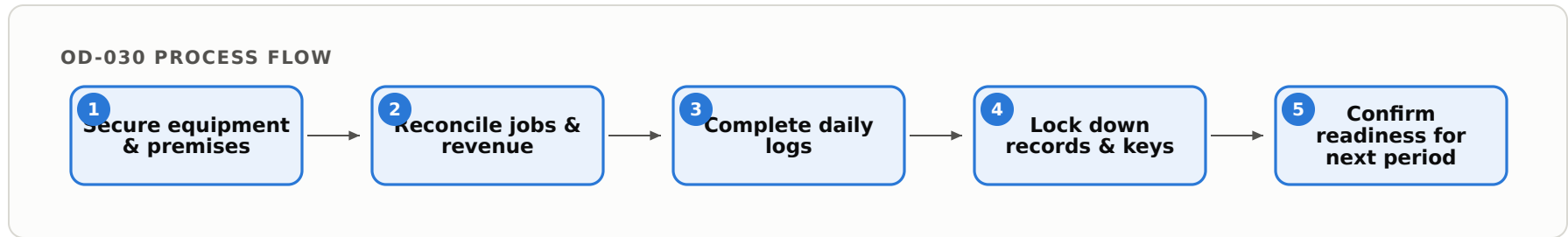
4. Required PPE & Lockout/Tagout

- Standard facility PPE for any yard walk-down: high-visibility vest, closed-toe safety footwear; gloves where handling equipment or stored cargo.
- Lockout/Tagout: Not applicable to the clerical closeout itself. Where the service line operates vehicles or powered equipment, confirm each unit is keyed off, parked, and secured; tag out any unit flagged for repair per the facility maintenance process before it re-enters service.

5. Regulatory References

- 29 CFR 1904 (OSHA) — recording and retention of work-related injuries/illnesses; end-of-day log entry where an incident occurred.
- 29 CFR 516 (FLSA, U.S. DOL) — retention of accurate daily/weekly hours-of-work records.
- Applicable state and local requirements for lien-required custody records where property is stored (e.g., towed-vehicle or crated-goods inventory logs).
- None beyond the above is uniformly sector-specific; internal cash-handling and records-retention policy applies as the governing frame.
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

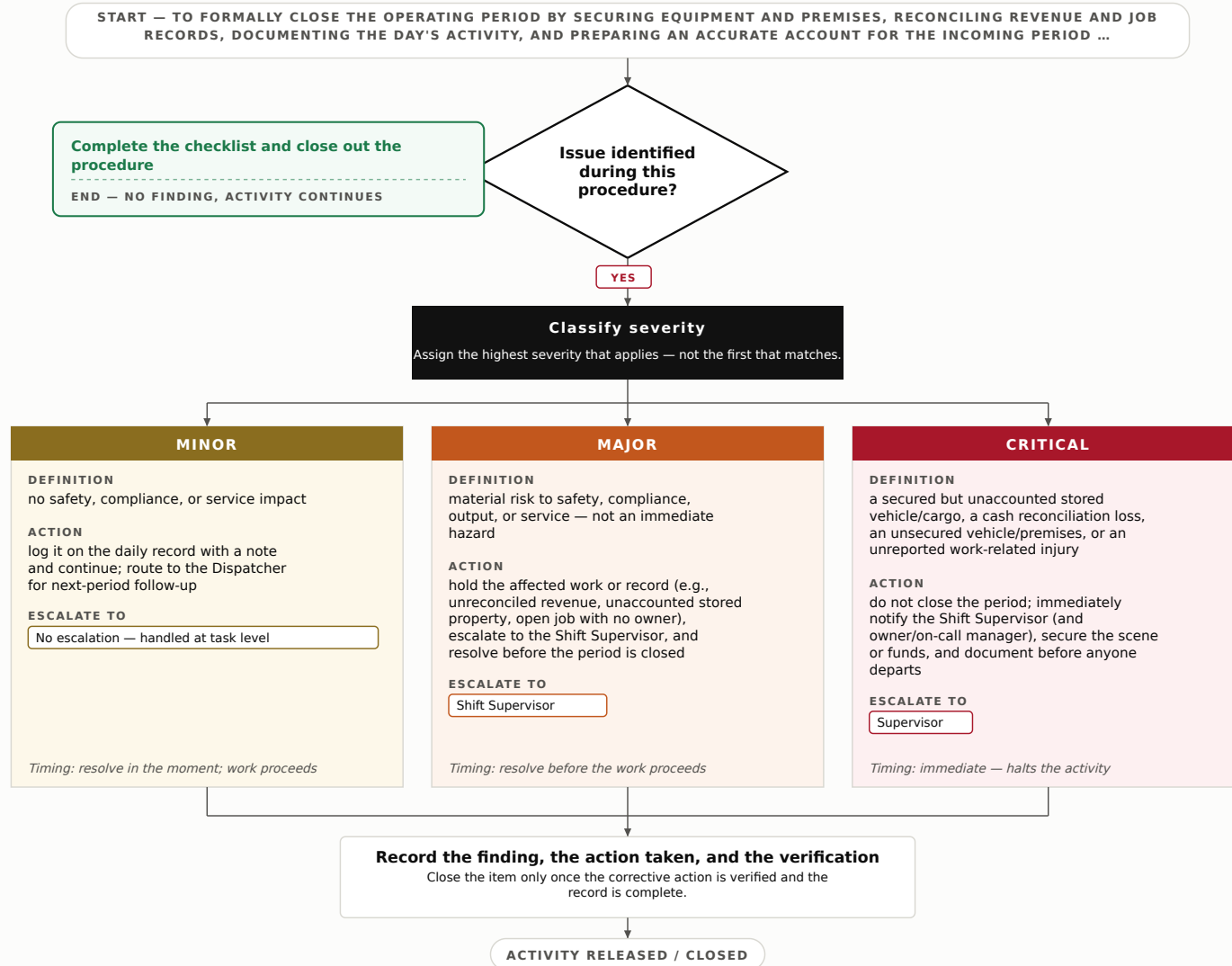


7. Step-by-Step Procedure

1. Confirm all field work is closed or accounted for: verify the dispatch board shows every job as completed, released to the next period, or documented as open with reason.
2. Return and secure equipment: park and key off all vehicles/powered equipment (where operated), account for straps, dollies, packing/crating tools and navigation units; note any damaged or missing items.
3. Verify stored-property custody: reconcile any towed vehicles, crated goods, or held cargo against the custody/inventory log; confirm each item's location and lien/hold status.
4. Reconcile revenue: total cash, card, and account charges against completed job tickets; resolve or document any variance and secure funds per internal cash-handling policy.
5. Complete daily operations logs: record hours worked, fuel/mileage entries, incident notes (if any), and equipment status.
6. Secure premises and access: verify gates, bays, storage areas, and offices are locked; account for all keys/fobs and lock down records systems.
7. Escalate any unresolved item per the Decision Tree (Section 8) to the Shift Supervisor before departure.
8. Record completion: complete the Inspection Checklist (Section 10) and obtain Supervisor Verification (Section 12); retain the signed record per policy.

8. Decision Tree

Decision Tree — End-of-Shift / End-of-Day Operations Closeout



READING THIS TREE

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- All jobs on the dispatch board are closed, released, or documented as open with reason.
- Revenue totals reconcile to completed job tickets with variances documented.
- Stored-property custody log fully matches physical count and hold status.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
All vehicles/equipment returned, keyed off, and secured (where operated)		
Dispatch board / open-job list closed or documented		
Cash, card, and account revenue reconciled to job tickets		
Stored-property custody log matches physical count and hold status		
Daily hours, fuel/mileage, and incident logs complete		
Premises, storage areas, and records systems locked and keys accounted for		
All Major/Critical findings escalated and documented		

11. KPIs

- Reconciliation accuracy — 100% of revenue reconciled to job tickets, zero unexplained variance.
- Closeout completeness — 100% of jobs and stored-property items accounted for at close.
- On-time closeout — daily record signed within 60 minutes of shift end.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for TRANSPORT_SUPPORT.	Archetype Content Team