

STANDARD OPERATING PROCEDURE

How to keep one record per driver, from hire to exit.

Six steps that keep every driver's pay rates, app access, events, coaching, hours and history in one record, from the day they are hired to the day they leave.

PORTALS	General, Scorecard, Scheduling, Ultimate DA
ROLES	Owner, Manager, Dispatcher, Finance
HOW OFTEN	On hire, Same day, Weekly, As needed, On exit
PAGES USED	Associates, Schedule, Imports, Ultimate DA
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READ ONLINE	ultimatedsp.com/knowledge/da-management

What this SOP fixes

- A driver's history is spread across payroll, spreadsheets and texts.
- Pay rate, events and coaching all live in different places.
- When a driver disputes something, there is no record to pull.
- Leavers keep their access and stay on schedules after they have gone.

How to use it: read sections 1 to 6 once. Then run section 7 on the rhythm in section 6, and print the checklists in section 11 for the wall.

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1. Purpose and scope

This SOP keeps one record per driver, from hire to exit. Pay rates, payroll IDs, app access, events, coaching, acknowledgments, hours and the exit all live on the same Associates record, and every number on it comes from the page that owns it.

It is written for the owner and manager who hire, coach and offboard drivers, the dispatcher who logs events and adds shifts, and finance, who reads timecards. The record is also what you show when a driver disputes something.

This SOP covers

- Adding a driver with pay rates and payroll IDs.
- Inviting the driver to Ultimate DA.
- Same-day events and coaching.
- Checking hours before adding shifts.
- Pulling the full record for a dispute.
- Deactivating leavers.

It does not cover

- Hiring, background checks and onboarding paperwork outside Ultimate DSP.
- Running payroll and final pay.
- Employment law. Take advice from your employment lawyer.

2. Why this matters

Most DSPs keep a driver in five places: payroll, a spreadsheet, a group text, Amazon's portal and someone's memory. When a question comes up, nobody has the whole story. Four gaps cause it:

THE PROBLEM	WHAT IT COSTS YOU
A driver's history is spread across payroll, sheets and texts	Nobody has the whole story when a decision has to be made.
Pay rate, events and coaching live in different places	Profit is costed with guessed rates, and coaching is not linked to what happened.
There is no record to pull in a dispute	It becomes your word against the driver's.
Leavers stay active	They keep app access and stay on schedules after they have gone.

3. What good looks like

- Every driver's pay rates are on their record before their first shift.
- Every driver is invited to Ultimate DA on day one.
- Every event and coaching is logged the same day it happens.
- Hours are checked before any shift is added.
- The full record is pulled before any dispute meeting.
- Leavers are set inactive the day they leave, and their records are kept.
- Every question about a driver is answered from one record.
- Every coaching a driver disputes has an acknowledgment behind it.
- Nobody who has left still has access or shifts.

4. Roles and responsibilities

ROLE	WHAT THEY OWN IN THIS SOP
Owner	Adds drivers and rates, exports full records for disputes and deactivates leavers.
Manager	Adds and edits drivers, invites them to the app, coaches and deactivates leavers.

ROLE	WHAT THEY OWN IN THIS SOP
Dispatcher (Operations)	Logs events and adds shifts. Can read pay rates but not change them.
Finance	Reads records and timecards, and exports documents. Cannot change the roster.
Sub Admin	Has the same rights as the Owner on this page.
Driver	Accepts the app invite, completes coaching and keeps their own copy of what they acknowledged.

5. Before you start

Set these up once. Every step below assumes they are in place.

TASK
☐ Connect your DSP phone line in Admin, Connections, so invites and messages can be sent.
☐ Lock the payroll calendar in Payroll Setup, so hours show by pay period.
☐ Import the driver roster on the Imports page, or add drivers one by one.
☐ Build coaching modules and pair them with your standards.
☐ Set your company's display name in Company & Station, so drivers see it in the app.

6. The rhythm

When each part of the procedure happens, who does it and on which page.

WHEN	WHAT	WHO	WHERE
On hire	Add the driver with rates and payroll IDs	Owner or Manager	Associates
Day one	Invite to Ultimate DA with the driver present	Owner or Manager	Associates
Same day as any event	Log the event and assign coaching	Manager or Dispatcher	Associates
Every week	Check hours before adding shifts	Manager or Dispatcher	Associates, Schedule

WHEN	WHAT	WHO	WHERE
Before a dispute meeting	Export the full record	Owner or Manager	Associates
On exit	Deactivate, clear shifts, update Amazon's portal, final pay	Owner or Manager	Associates, Schedule

7. The procedure, step by step

Six steps across a driver's time with you: two at hire, one on the day of any event, one every week, one when a dispute comes up and one when they leave.

1

Enter pay rates when you hire, not at payroll

On hire

Where General · Associates **Who** Owner or Manager

WHY THIS STEP MATTERS

A rate left for payroll day means a week of daily profit costed at a default rate. Profit Projection reads each driver's own rate, and a missing rate is costed at a flagged default until someone adds it.

HOW TO DO IT

1. Open General, then **Associates**, and click **+ Add DA**.
2. Enter the **Transporter ID**, and the **Name** as LAST, FIRST.
3. Enter the **Paycom EE Code** or the **ADP File Number**, the **Phone** and the **Email**.
4. Enter the **Hourly Rate** and the **OT Rate**. Leave the OT Rate blank to use one and a half times the hourly rate.
5. Add **Qualifications** and **Allowed Vehicle Types**, then click **Save**.
6. For an existing driver, open their record and click **Edit Associate**.

WHAT TO CHECK

- Both rates are money with two decimals, above zero.
- The driver has a Paycom or ADP code, so they appear correctly in the payroll export.
- The phone number and email are right, so the app invite can go out.

Done when: The driver is on the roster with both rates and a payroll ID, and nothing downstream shows a default rate for them.

IF SOMETHING IS WRONG

- The toast says Transporter ID and name are required: fill in both.

- The form refuses a duplicate Transporter ID or payroll code: that driver already exists. Open their record instead.
- A rate outside the usual range shows a warning: check it, then save if it is right.
- Profit Projection shows a default rate for a driver: their hourly rate is blank. Add it here.

KEEP A RECORD

Every field edit is audited: who made it, when, and the old and new values.

2

Invite every new driver to Ultimate DA on day one

On hire

Where General · Associates **Who** Owner or Manager

WHY THIS STEP MATTERS

Coaching can only be finished and acknowledged in the app. A driver who is never invited cannot acknowledge anything, so their coaching goes overdue and blocks their shifts. Doing it on day one, together, catches a wrong email before it costs a shift.

HOW TO DO IT

1. Check that the record has the driver's email and a 10-digit phone number.
2. Open the driver's record, click the menu at the top right and choose **Invite To Ultimate DA**.
3. Tell the driver which email address to use. Nothing is filled in for them in the app.
4. The driver opens the text, creates an account with that email, sets a password and verifies the email.
5. On the next launch, the app shows that they have joined your DSP.

WHAT TO CHECK

- The status reads invited after sending, and active after the driver signs in.
- The driver sees your DSP's name in the app.
- The driver can open their coaching in the app.

Done when: The record's app status reads active, and the driver can open their score and coaching.

IF SOMETHING IS WRONG

- The invite is refused because there is no email on the record: add the email and send it again.
- The invite cannot be sent: your DSP phone line is not set up in Connections.
- The driver typed a different email: the app refuses it. Use the email on the record.
- The invite is refused and names another company: the driver is still linked to another DSP.
- The driver never verified the email: the app stays blank with a banner asking them to verify. Ask them to resend the verification email from the banner.

KEEP A RECORD

The app status on the record shows not invited, invited or active.

3

Log the event and assign coaching the same day

Same day

Where General · Associates **Who** Manager or Dispatcher

WHY THIS STEP MATTERS

An event logged days later gets argued about, and coaching sent days later is not connected to the mistake. Doing both the same day keeps them fair, and the acknowledgment turns them into a record that holds up later.

HOW TO DO IT

1. Open the driver's record and click **+ Log Event**. Pick the standard, set the date and quantity, write what was seen and save.
2. Click **Assign Coaching**. Pick the module, set the days to finish it, keep **Blocks Shift When Overdue** on and click **Assign**.
3. Talk to the driver about it the same day. For a safety alert, call them first to check they are safe.
4. Watch the Coaching card on the Performance tab: it shows Assigned, Awaiting Ack, Overdue or Clear.

WHAT TO CHECK

- The event shows on the Performance tab, with its points.
- The coaching shows, with its due date.
- The Overview tab shows no Blocked line, or you know why it does.

Done when: The event is on the driver's Performance tab, and the coaching shows as assigned.

IF SOMETHING IS WRONG

- The toast asks you to pick a module: choose one before assigning.
- The Overview shows Blocked: the driver has overdue coaching and cannot be scheduled until they acknowledge it.
- The coaching shows Awaiting Ack: the quiz is passed but not acknowledged, so it is still open.
- The driver cannot acknowledge: their app status is not active. Invite them, as in step 2.

KEEP A RECORD

The event, the coaching and the acknowledgment stay on the record. A coaching closed by hand is labeled as having no driver acknowledgment.

4

Check hours this pay period before adding shifts

Weekly

Where General · Associates **Who** Manager or Dispatcher

WHY THIS STEP MATTERS

A shift added without looking is how a fifth day, and overtime, happen. The record shows the pay-period hours and the rolling hours against the cap in one place, before the shift is booked.

HOW TO DO IT

1. Open the driver's record. On [Overview](#), read HOURS PP for the current pay period.
2. Open the [Schedule](#) tab and read the rolling hours against the cap, and the flags on each shift.
3. Click **+ Add Shift** to add a shift from the record, or [Record Time Off](#) for approved time off.
4. Read the rule check in the shift dialog before you save.

WHAT TO CHECK

- The new shift keeps the rolling hours under the cap.
- No flag says the shift hits the rolling cap.
- Time off is recorded, so the driver is not scheduled on those days.

Done when: Every shift added this week was checked against the driver's hours first.

IF SOMETHING IS WRONG

- HOURS PP shows a dash: the payroll calendar is not locked. Lock it in Payroll Setup.
- Worked hours show a dash on the Timecard: worked hours only arrive through the payroll connection.
- The shift dialog refuses the shift for the hours cap, a coaching block or a second shift that day: choose another day or another driver.

KEEP A RECORD

The shift shows on the Schedule tab with its source, and time off shows on the Timecard.

5

Pull the driver's full record before any dispute meeting

As needed

Where General · Associates **Who** Owner or Manager

WHY THIS STEP MATTERS

A dispute handled from memory becomes your word against the driver's. The record holds every event, coaching and acknowledgment, and it is the same record a lawyer or a hearing would ask to see.

HOW TO DO IT

1. Open the driver's record and the [Documents](#) tab.

2. Read **Coaching And Acknowledgements**: each row shows the date, the line and the state, Acknowledged, Overdue or Manual.
3. From the record's menu, click **Export Full Profile**.
4. Bring the export, and the Performance tab, to the meeting.
5. Afterwards, keep the export in the driver's locked personnel file.

WHAT TO CHECK

- Every coaching you want to discuss shows Acknowledged, with a date.
- Manual rows are understood as having no driver acknowledgment.
- The export is saved before the meeting.

Done when: You have the driver's full record in front of you before the meeting.

IF SOMETHING IS WRONG

- A row shows Manual: someone closed it by hand, without the driver acknowledging. Do not present it as acknowledged.
- A row shows Overdue: the coaching was never finished, and it is still open.
- The driver says they never saw the coaching: the acknowledgment record holds the time they tapped and the exact statement they were shown.

KEEP A RECORD

Acknowledgment records cannot be edited. A voided record is struck through, and nothing is erased.

6

Set leavers inactive the day they leave

On exit

Where General · Associates **Who** Owner or Manager

WHY THIS STEP MATTERS

A leaver who stays active keeps app access and stays eligible for schedules. Deactivating on the day closes both at once, and keeps the history you may need later.

HOW TO DO IT

1. Open the driver's record, click the menu at the top right and choose **Deactivate DA**. Read the confirmation and confirm.
2. On Schedule, remove the shifts the driver still holds. They show as hard issues until they are removed.
3. Update the driver's status in Amazon's portal, with a reason.
4. Collect the badge, uniforms and any company phone.
5. Pay final wages and any unused time off through payroll, on time.

WHAT TO CHECK

- The record shows the red Inactive band, with the date.
- The driver no longer appears in the default Active list.
- No shifts remain for the driver on Schedule.

Done when: The record shows Inactive with the date, and the driver's remaining shifts are cleared from Schedule.

IF SOMETHING IS WRONG

- Delete is refused: a record with history can only be deactivated, which keeps the evidence.
- Schedule shows hard issues for the leaver: remove their remaining shifts.
- A roster file lists the driver as inactive: files never deactivate anyone. Use **Deactivate DA**.
- The driver comes back: **Reactivate DA** restores the record, and they need a new app invite.

KEEP A RECORD

Every record is kept after deactivation, and the driver keeps their own copy of what they acknowledged in the app.

8. The three numbers to watch

Read these numbers on the cadence in the rhythm table. Each one tells you whether the procedure is working.

NUMBER	WHAT IT TELLS YOU	ACT WHEN
Hours this period	Scheduled hours in the current pay period, from the locked payroll calendar.	It is high midweek: check the rolling cap before adding a shift.
Open coaching	Coaching assigned to the driver and not yet acknowledged.	It is overdue: the driver is blocked, so call them today.
App status	Not invited, invited or active in Ultimate DA.	It is not active for a working driver: invite them, or they cannot acknowledge coaching.

9. Common mistakes

MISTAKE	WHY IT HURTS	DO THIS INSTEAD
Entering pay rates at payroll.	Daily profit is costed at a default rate all week.	Enter both rates when you add the driver.

MISTAKE	WHY IT HURTS	DO THIS INSTEAD
Inviting drivers to the app later.	Coaching cannot be acknowledged, so it goes overdue and blocks shifts.	Invite on day one, with the driver present.
Writing drivers up outside the record.	The write-up is not linked to the event or the coaching.	Log the event and assign coaching on the record.
Adding shifts without checking hours.	A fifth day becomes overtime.	Check the hours on the record first.
Going into a dispute from memory.	It becomes your word against the driver's.	Export the full record first.
Leaving leavers active.	They keep app access and stay on schedules.	Deactivate them the day they leave.

10. When to escalate

- A driver still cannot get into the app after two tries: the manager checks the email and phone on the record, and resends the invite.
- A driver disputes a record that shows an acknowledgment: the owner goes through it with the driver and keeps the export.
- A pay rate is disputed: the owner checks the rate on the record against the offer and payroll before changing anything.
- A leaver's final pay or their status in Amazon's portal is still open: the owner follows up before the required deadline.

11. Printable checklists

Print this page and pin it where the work happens. Tick each line and initial it. Keep the sheet with the day's records.

On hire

Date or week of: _____ Checked by: _____

TASK	DONE BY
☐ Transporter ID and name entered	
☐ Hourly and overtime rates entered	
☐ Paycom or ADP code entered	
☐ Phone and email checked	
☐ App invite sent and the driver active	

Every week

Date or week of: _____ Checked by: _____

TASK	DONE BY
☐ Events logged the same day	
☐ Coaching assigned for each event	
☐ Hours checked before adding shifts	

On exit

Date or week of: _____ Checked by: _____

TASK	DONE BY
☐ Driver deactivated	
☐ Remaining shifts removed	
☐ Status updated in Amazon's portal	
☐ Badge, uniforms and phone collected	
☐ Final pay processed	

12. Terms used in this SOP

TERM	MEANING
Associate record	The one record for a driver, with Overview, Schedule, Performance, Dispatch, Timecard and Documents tabs.
Transporter ID	The driver's Amazon ID, and the key of their record.
Paycom EE code, ADP file number	The payroll IDs written into the schedule export.
Ultimate DA	The driver app, for coaching and the driver's own score.
App status	Not invited, invited or active.
Event	A scored record of a mistake or a win against a standard.
Acknowledgment	The driver's confirmation in the app that closes coaching and keeps the record.
HOURS PP	Scheduled hours in the current pay period.
Deactivate	Offboarding that ends access, keeps every record and can be reversed.

13. Related SOPs

- Automated coaching: ultimatedsp.com/knowledge/automated-coaching
- Scheduling: ultimatedsp.com/knowledge/scheduling
- Control who sees what: ultimatedsp.com/knowledge/control-who-sees-what

About this SOP

Written by an Amazon DSP that runs these procedures every day, using the pages of Ultimate DSP. Amazon's program policies, your DSP agreement and the law come first: where they differ from this SOP, follow them. Page names and on-screen labels match Ultimate DSP as of September 2026. The latest version is online at ultimatedsp.com/knowledge/da-management.