



Custom Forms and Tasks

Custom Forms [+ Add Custom Form](#)

	Name	Created at	
	Test Form	02:24 pm 3/14/2022	
	Employee April Notice	11:03 am 3/21/2022	

Custom Tasks [+ Add Custom Task](#)

	Name	Created at	
	Testing custom task	02:29 pm 3/14/2022	
	Testing custom task 1		
	Company Tablet Form		
	Employee April Form		

### Update Custom Form

Name

Content

This is an example of a custom form. This is the "attachment" to the email. You can copy/paste contents from your companies internal forms, or simply type the contents out.

[Save](#)

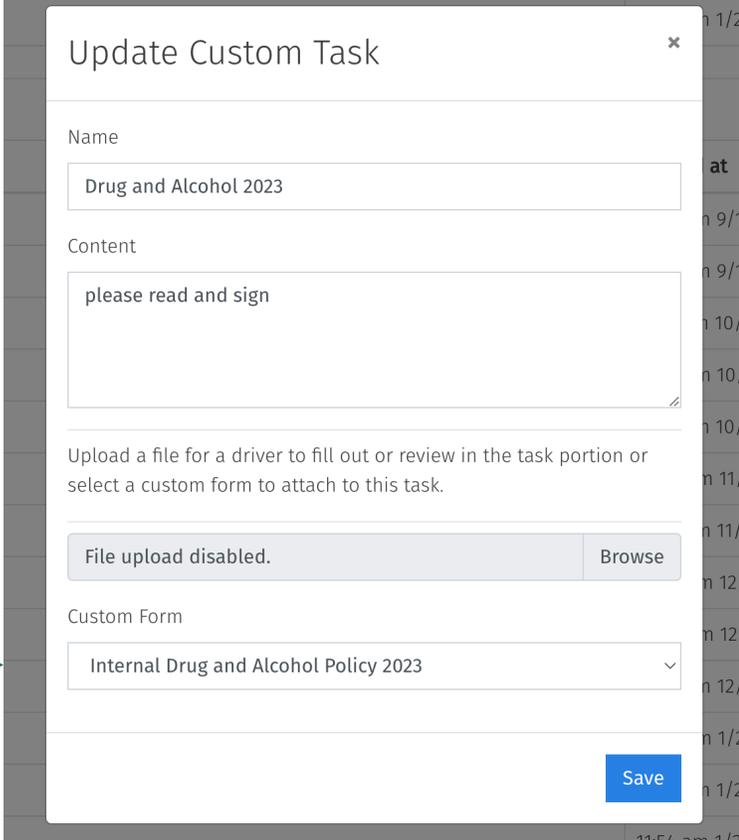
Within your company profile, an admin can setup Custom Forms;

1. Add custom Form
2. Name the Form
3. Add the contents of the form, or what you want the driver to review
4. Save it

An Admin can create 2 types of custom tasks..

1

Your custom task will include a custom form;  
1. Name the task the same thing  
2. Include Instructions to Driver  
3. Choose custom form with same naming convention

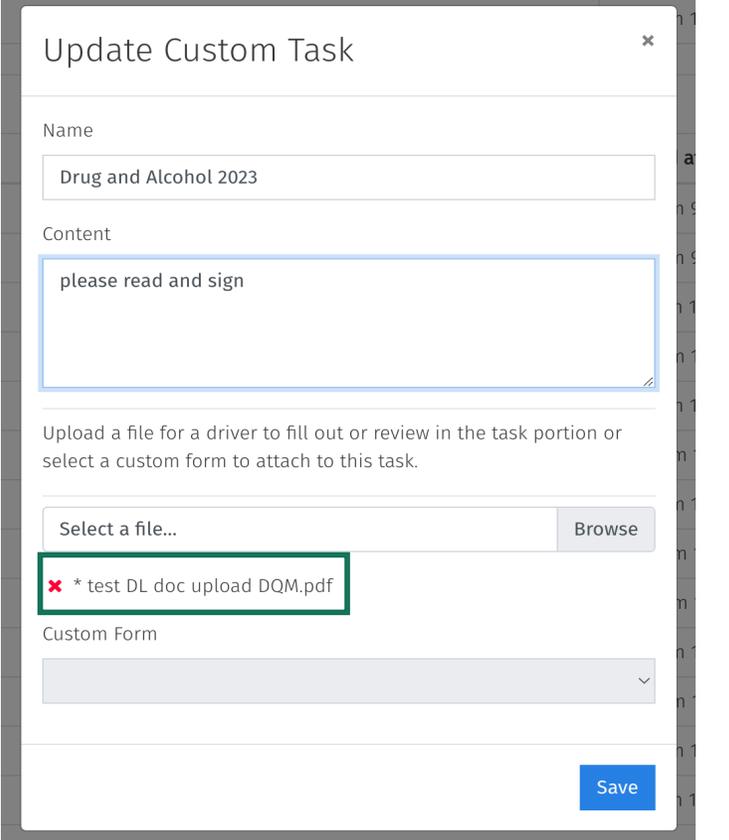


The screenshot shows a dialog box titled "Update Custom Task" with a close button (x) in the top right corner. It contains three main sections: "Name" with a text input field containing "Drug and Alcohol 2023"; "Content" with a text area containing "please read and sign"; and "Custom Form" with a dropdown menu showing "Internal Drug and Alcohol Policy 2023". Below the content area, there is a message "Upload a file for a driver to fill out or review in the task portion or select a custom form to attach to this task." followed by a disabled file upload area that says "File upload disabled." and a "Browse" button. At the bottom right, there is a blue "Save" button. A green arrow points to the "Custom Form" dropdown menu.

2

Your custom task will include an uploaded form;  
1. Name the Task  
2. Include Instructions to Driver  
3. Choose an attachment from your computer

or



The screenshot shows a dialog box titled "Update Custom Task" with a close button (x) in the top right corner. It contains three main sections: "Name" with a text input field containing "Drug and Alcohol 2023"; "Content" with a text area containing "please read and sign"; and "Custom Form" with a dropdown menu that is currently empty. Below the content area, there is a message "Upload a file for a driver to fill out or review in the task portion or select a custom form to attach to this task." followed by a file upload area with a "Select a file..." input and a "Browse" button. Below this, a file selection list shows "\* test DL doc upload DQM.pdf" with a red 'x' icon, which is highlighted with a green box. At the bottom right, there is a blue "Save" button.

Add new ▾ Filter ▾ Actions ▾ 6 record(s) selected ⓘ

		First name		DL #	City	State
<input checked="" type="checkbox"/>		Buck		T7878788	auburn	CA
<input checked="" type="checkbox"/>		Alex		F2222222	Anytown	CA
<input checked="" type="checkbox"/>		Karl		N9653621	AnyTown	CA
<input checked="" type="checkbox"/>		Geotab		L8989219	fremont	CA
<input checked="" type="checkbox"/>		test	geotab driver	T0808799	Auburn	CA
<input checked="" type="checkbox"/>		Driver	Testing	H0009292	Auburn	CA
<input type="checkbox"/>		Ronald	Reyes	H0603195	test	CA
<input type="checkbox"/>		George	Stone	C1234567	Here	CA

Select all on this page  
 Unselect all on this page  
 Select all (Up to 500)  
**Select a custom task**  
 Mark driver(s) for audit  
 Export Clearinghouse (.xlsx)

Select a custom task

Select a task below to send to the list of users.

- Internal Drug Policy
- base access
- Update Drug policy 2022
- Custom Form Testing
- TWIC
- form example 1
- Task Name
- Tablet
- Demo Task
- Drug and Alcohol 2023**
- DMV Reg 201 Application for Changes
- DMV Reg 201 Application for Changes v2
- Monthly Education Modules

- To send a custom task;
1. Go to your drivers list
  2. Select the Drivers you want to send to
  3. Click Actions, Click 'Select a Custom Task', Then Select your Task
  4. By hitting send, all drivers you have marked will receive this custom task notification through email and text message with a direct link to DQM

Welcome back, Lisa Prust.

 License renewal

[view more](#)

 Medical card renewal

[view more](#)

 Drug and Alcohol 2023

[view more](#)

 DMV Reg 201 Application for Changes v2

[view more](#)

When a driver logs into DQM connect, the first thing they see is their documents that require attention

### Task

Type Drug and Alcohol 2023

### Driver

Name Lisa Prust

Address 6840 Main Street, Georgetown , CA 95634

Driver licenses # C1234456

Cell phone

Last 4 SSN 2222

### Company

Name VLC DEMO

Address 2390 Lindbergh St. Ste 200, Auburn, CA 95602

### Driver tasks

#### Message:

This acts as your actual "email"  
Attach the Custom Form or "attachment"  
Tell the driver what you want from them;  
"Please read and sign this New Policy".

#### Form:

dont do drugs in 2023

#### Signature

test driver|

#### Date

01/24/2023



Complete

A driver will review the instructions, complete the task, sign and date the task, then push it back to the admin by clicking 'complete'.

-If it is an attached document, it can be downloaded by the driver and reuploaded when completed.

Filter ▾

 🔍 ↻

	First Name	Last Name	Type	Status	Due on	Last sent at	Created at
📄	test	geotab driver	Custom - Internal Drug Policy	Ready		01/05/2023	01/05/2023
📄	Ronald	Reyes	Custom - Drug and Alcohol 2023	Ready		01/17/2023	01/17/2023
📄	Ronald	Reyes	Custom - Drug and Alcohol 2023	Ready		01/17/2023	01/17/2023
📄	Ronald	Reyes	Custom - Drug and Alcohol 2023	Ready		01/05/2023	01/05/2023
📄	Max	Reynolds	Custom - Drug and Alcohol 2023	Ready		01/17/2023	01/17/2023
📄	Lisa	Prust	Custom - Drug and Alcohol 2023	In Review		01/17/2023	01/17/2023
📄	Lisa	Prust	Custom - DMV Reg 201 Application for...	Ready		01/24/2023	01/24/2023

An admin will be notified via their dashboard that there is a document that needs review.

- 'Ready' means the task is ready for the driver to complete
- 'In review' means they have completed the task and the admin must now review it to remain in compliance.

## Task

Status	In Review
Type	Drug and Alcohol 2023
Last sent at	01/17/2023
Created at	01/17/2023

## Driver

Name	Lisa Prust
Address	6840 Main Street, Georgetown , CA 95634
Driver licenses #	C1234456
Cell phone	
Last 4 SSN	2222

## Company

Name	VLC DEMO
Address	2390 Lindbergh St. Ste 200, Auburn, CA 95602

## Driver tasks

### Message:

This acts as your actual "email"  
Attach the Custom Form or "attachment"  
Tell the driver what you want from them;  
"Please read and sign this New Policy".

### Form:

dont do drugs in 2023

### Signature

test driver

### Date

01/24/2023

## Admin tasks

Please review the items above to validate the driver has completed the task.

Complete

Push back

An admin will review the task and select Complete or Push Back  
-'Push Back' will put the task back on the driver dashboard for revisiting  
-'Complete' will generate the form and file the document away in the Drivers Profile

Admin View-  
In Review

Attachments ⚠️ 9 / 19

Current

Type	Created at	
 Supporting Documents	09:25 am 9/7/2022	
 Road Test Exam	09:36 am 9/7/2022	✓
 Road Test Certification	09:36 am 9/7/2022	✓
 Driver licenses back		
 Medical Card		
 Motor Vehicle Record		
 Employment Application		
 Drug and Alcohol Clearinghouse - Limited Query Authorization		
 PSP Disclosure and Authorization Form		
 Internal Drug and Alcohol Policy 2023		

Preview

1c26a41d-8118-43d9-b3c6-274ed004b... | 1 / 1 | 82% |   



1



Company: VLC DEMO  
2390 Lindbergh St. Ste 200, Auburn, CA 95602  
Phone: 530-637-1696  
Date: 2023-01-24

### Internal Drug and Alcohol Policy 2023

---

**Employee name:** Lisa Prust  
**Employee licenses #:** C1234456  
**Cell phone:** 530-333-7853

---

**Employee Signature:** *Lisa Prust*      **Employee Date:** 01/24/2023

Download

The completed form is generated into a document with your company logo, and basic information, then it is stored in the drivers file  
-It is also available for download or print if ever needed