

# LearningCurve

## For the Record

By Sandra Whittaker

As the “artsy” one in the family, growing up I could never be accused of being organized. My grandma used to say, “Some people are organized and other just aren’t.” She made it seem like some kind of genetic ability. So, I accepted my fate as organizationally challenged. Over the years, however, I have come to realize the importance of committing myself to organization, especially in keeping records. Tax time can be a very convincing catalyst for keeping good records.



In the non-emergency transportation industry, keeping proper records is an important business function. Whether it is vehicle inspections, background checks or signed trip tickets, your business’ success relies on records and therefore, proper records maintenance. Organization “experts,” or freaks as I like to call them, say the first step to a good record keeping system starts with understanding how good records will help your business. So, here you go.

**Step 1.** Keeping good records can provide:  
Your company’s financial performance  
A means to monitor successes/ shortcomings in focalized areas  
Reduced stress and increase efficiency during tax time  
Help with developing your business plan  
Persuasive documentation for potential investors, partners, and lenders

Another motivator for good records maintenance is that in the sometimes-unpredictable industry of transportation management, if a contract expires or terminates, Transportation Providers must forward all required records to MTM for a retrospective audit. Non-compliance may cause a delay of final payment.

Congratulations, you’ve just completed step one in keeping good records- knowing how it will benefit your company. Now, that wasn’t so painful, was it?



**Step 2.** Find a system that works for you.  
Whether it is a filing cabinet or hanging folders, pick a system that is right for your business’ physical layout. The important thing is to create a depository for all records. Organization experts suggest starting with a modest system that can be improved over time as your business expands.  
**Step 3.** Organize the material in the most logical manner for your business.  
Create categories, subcategories and faithfully place each piece in its intended place when it comes into your office. Standardize each folder to ensure each piece of documentation in the file has its own place.

Keeping proper records is a part of your Service Agreement. MTM conducts annual inspections of all business records as part of our contractual requirements with our clients. This inspection includes documentation such as:

- Background checks- child abuse, elderly abuse, driving history,
- Driver’s health records
- Driver’s log
- Trip sheets
- Billing reports
- Vehicle inspection
- Proof of insurance

MTM’s Transportation Provider Guidelines list requirements for each type of record.

Having an organized method of collecting, storing, and retrieving important records will simplify annual inspections, claims processing, or audits. Applying these three simple steps will help even the most organizationally-challenged business owner.