Webinar Demonstration

SmartWay
U.S. Environmental Protection Agency

2023 SmartWay Online Logistics Tool
(2022 Data Year)

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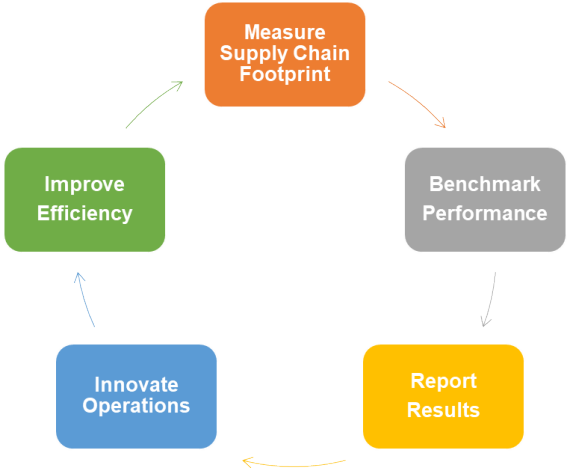
July 27, 2023

Agenda

- SmartWay Background
- What's New for Logistics This Year? What's the Same?
- Comprehensive Walkthrough and Screen Capture
- Live Demonstration
- Question & Answer

Background

- Partnership Program
- Jointly developed with the freight industry
- Goal: reduce emissions- CO2, NOx, PM
- Goal: Save Partners money through efficiency improvements

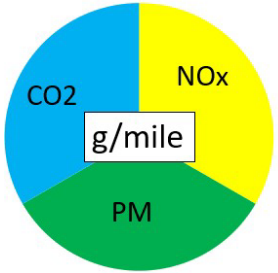


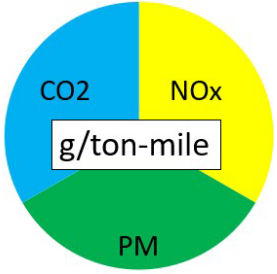
SmartWay System Core Functionality

SmartWay
U.S. Environmental Protection Agency

Carriers Submit Data in SmartWay Tools

SmartWay QA/QCs the Data & Creates Metrics

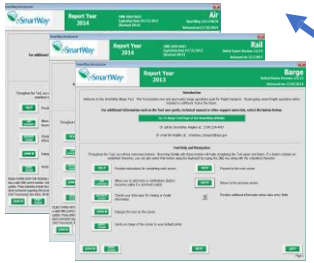




SmartWay's Current 6 Emission Metrics

Pollutants		Metrics	
CO2	Carbon Dioxide: a surrogate for fuel efficiency and global warming	Grams per Mile	Amount of pollution produced for every mile travelled
NOx	Oxides of Nitrogen: known for creating smog, a concern for local areas	Grams per Ton-mile	Amount of pollution produced for every ton that travels one mile, usually the best metric to use
PM	Particulate Matter: known for creating black soot, a concern for local areas		

Common Metrics Accessed by Customers



Feedback Mechanism

Used in Global & Other National Reporting Systems

Tool Development Timeline

- Program initiation: 2001
- Program launch: 2004
- SmartWay 1.0 Tools: Equipment based, Excel, 2004
- SmartWay 2.0 Tools: Performance based, Excel: 2008
- SmartWay 3.0 Tools (Online)
  - Online Truck Tools: 2020
  - Online Shipper Tool: 2021
  - Online Logistics Tool: 2022
  - Online Barge, Air, Rail Tools: 2024-2026
- Constant ongoing optimization (real time deployment with online tools)

What's New, What's the Same?

- Same as the Old Excel
  - Basic steps and progression of the tool
  - Data needed for input
    - Ton-miles, total miles, and/or average payload

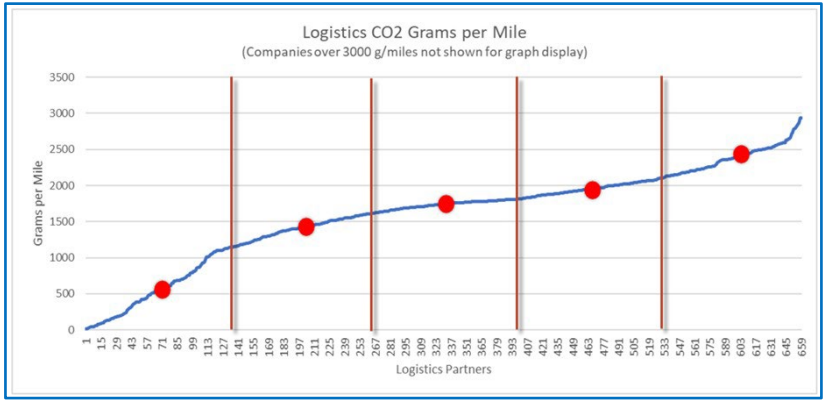
- New
  - Online Tool
  - 10 Performance Bins (formerly 5)
  - Additional Quality Control Checks

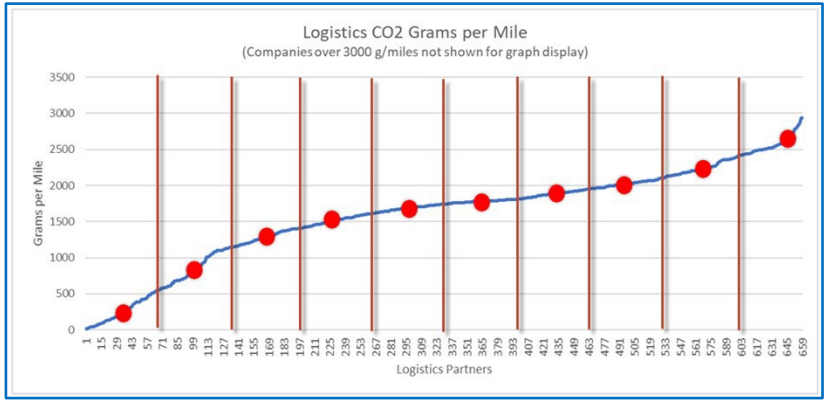
Changes due to going Online

- Accessed via your SmartWay *partner portal* not the SmartWay website
- Submit online, not via email
- Use a PC, Mac, or large screen tablet device
- Use any major web browser
- Saves data in your SmartWay partner portal
- More auto-populate options
- Real-time information on your carrier submittal status
- Easier data management
- Better Navigation
- Scalable to your screen size
- Updates to Tools applied instantaneously

10 Bins

- Allows more accurate representation of partner performance
- Necessary for the wide range of performance due to multiple modes
- Still reports the bin midpoint for all partners in that bin
- Still larger ranges than truck categories





Understanding Logistics Emission Factors

You are the weighted sum of all the fleets you use

The fleets you use

- Internal to your company
- Invisible to outsiders

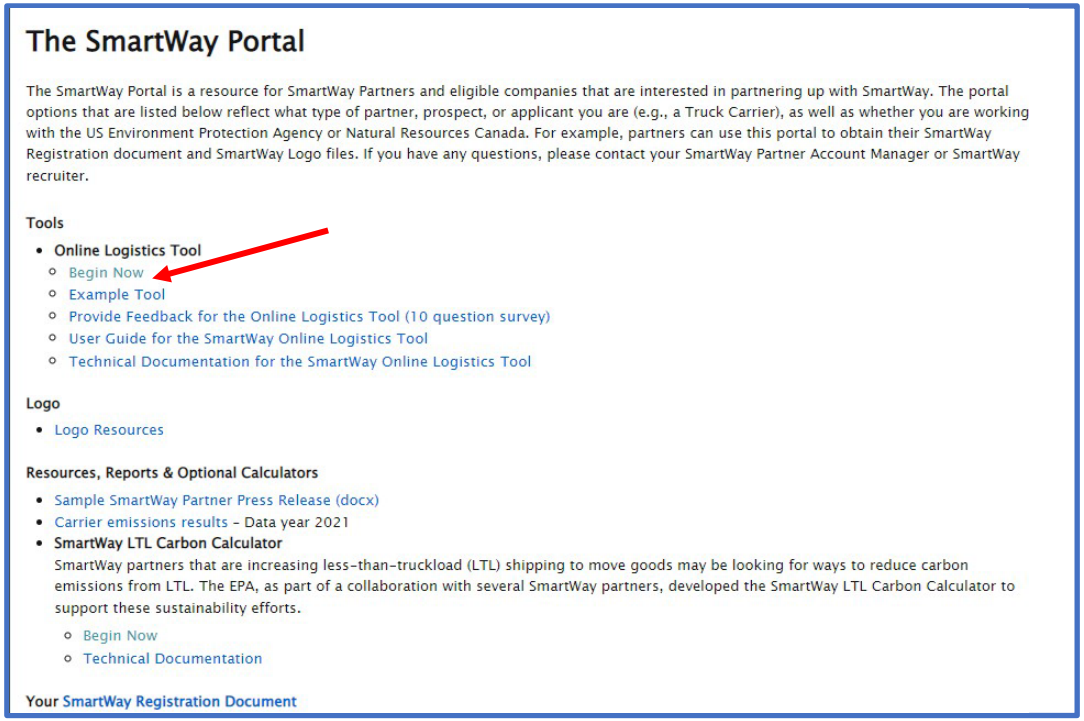
The fleets your customers see

- The best way to improve your emission factor is to:
  - Increase the % of your carriers that are registered SmartWay carriers: If some of your carriers are not SmartWay, encourage the ones you use the most to join first!
  - Then use better performing SmartWay carriers (bin 1 is better than bin 2…)
  - And lastly, consider using more efficient modes such as rail or barge

Getting Started

- Log into your SmartWay partner portal by entering your email address and your SmartWay ID at https://app4.erg.com/smartwayweb/portal/login.cfm?language=ENG

- ***NOTE: To ensure that e-mails from SmartWay/EPA are not blocked, new contacts may need to add SmartWay/EPA to their preferred list of trusted sources, often called the "Trusted Sender" list.***



The SmartWay Portal

The SmartWay Portal is a resource for SmartWay Partners and eligible companies that are interested in partnering up with SmartWay. The portal options that are listed below reflect what type of partner, prospect, or applicant you are (e.g., a Truck Carrier), as well as whether you are working with the US Environment Protection Agency or Natural Resources Canada. For example, partners can use this portal to obtain their SmartWay Registration document and SmartWay Logo files. If you have any questions, please contact your SmartWay Partner Account Manager or SmartWay recruiter.

Tools

- **Online Logistics Tool**
  - Begin Now
  - Example Tool
  - Provide Feedback for the Online Logistics Tool (10 question survey)
  - User Guide for the SmartWay Online Logistics Tool
  - Technical Documentation for the SmartWay Online Logistics Tool

Logo

- Logo Resources

Resources, Reports & Optional Calculators

- Sample SmartWay Partner Press Release (docx)
- Carrier emissions results – Data year 2021
- **SmartWay LTL Carbon Calculator**
  SmartWay partners that are increasing less-than-truckload (LTL) shipping to move goods may be looking for ways to reduce carbon emissions from LTL. The EPA, as part of a collaboration with several SmartWay partners, developed the SmartWay LTL Carbon Calculator to support these sustainability efforts.
  - Begin Now
  - Technical Documentation

Your SmartWay Registration Document

Working Online

- Remember…

Note: Your online session will "time-out" after two hours if you do not interact with a page, and data will be lost for that page. You do not have to complete all steps within two hours, but you must refresh or change the page within this time to avoid timing out. Otherwise, you must re-open the tool by accessing the SmartWay Portal.

Note - The SmartWay online tools do not allow users to cut/paste into the data entry fields. Data must be entered manually or through the import/auto populate functions.

Online Logistics Tool

- Comprehensive Screen Capture Walkthrough and Discussion

Example Logistics Tool is available at the SmartWay website: https://app4.erg.com/smartwaytools/1/logistics/ExampleTool/welcome.html

Right Tool?

SmartWay Online Logistics Tool

Is This The Right Tool For Me?

SmartWay Transport Partnership

First, let's make sure you are working on the right SmartWay tool. To help, please answer the following questions.

* Denotes a required field

1. Where are you headquartered? *
- (●) I am headquartered in the United States
- ( ) I am headquartered in Canada

2. Do you operate and manage your own fleet of trucks (owned or leased) that accounts for 5% or more of your outgoing freight? (If you have already submitted information regarding your asset-based fleet(s) using the online truck tool, select "NO".) *
- ( ) Yes (●) No

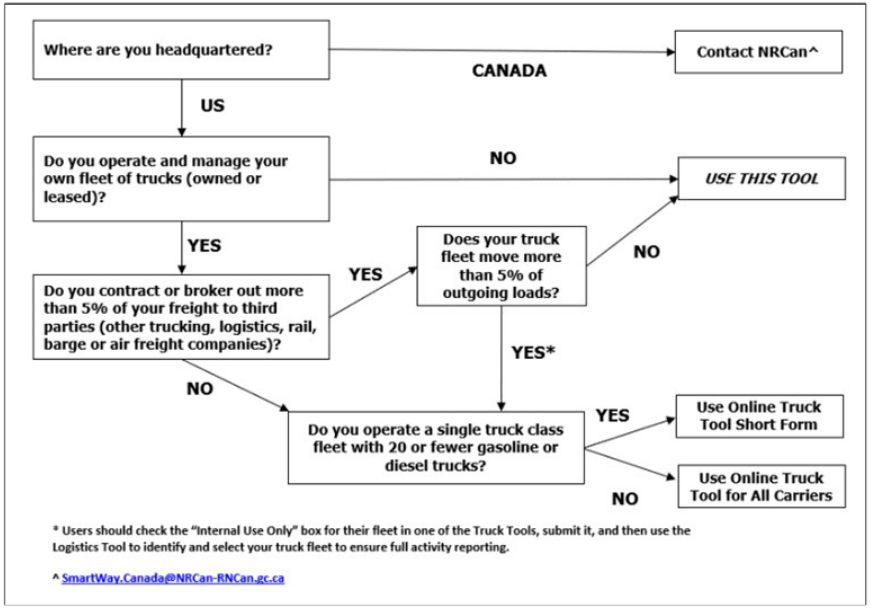
3. Do you contract out or broker out more than 5% of your freight to third parties? This includes trucking, rail, barge, air freight companies, and other logistics providers. *
- (●) Yes ( ) No

You are using the right SmartWay tool.

Close the Tool | Save and Continue | Help

***Before beginning, use this chart to make sure you choose the right tool for your operations! ***

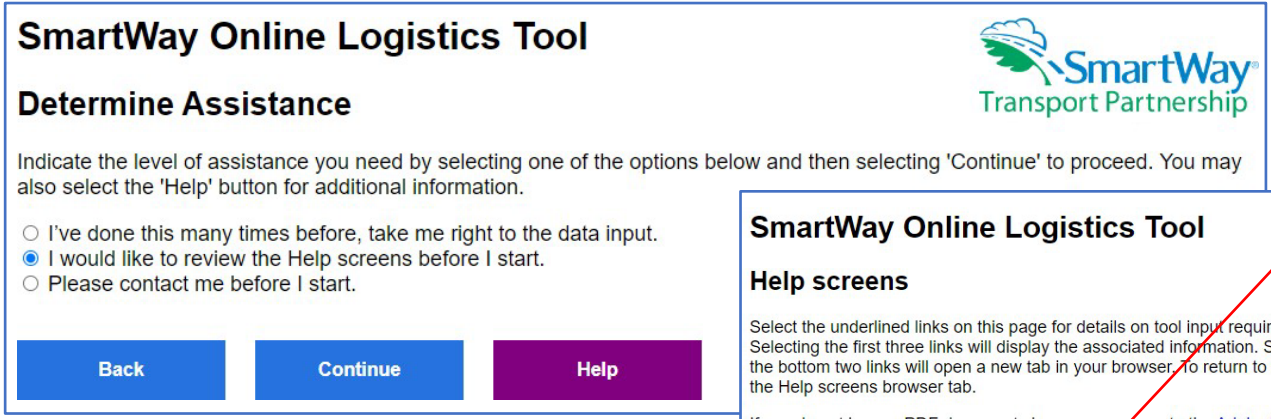
IS THIS THE RIGHT SMARTWAY TOOL FOR ME?



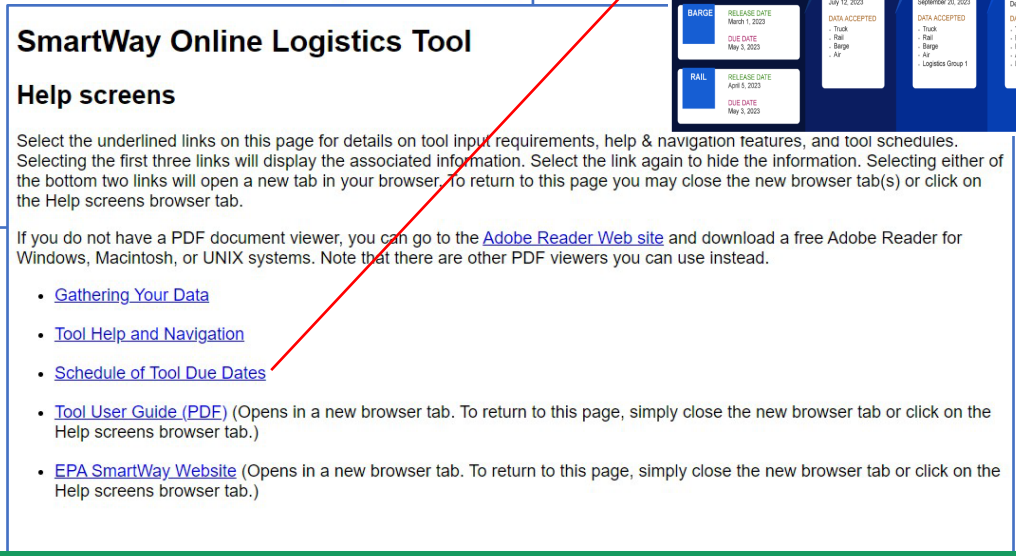
* Users should check the "Internal Use Only" box for their fleet in one of the Truck Tools, submit it, and then use the Logistics Tool to identify and select your truck fleet to ensure full activity reporting.

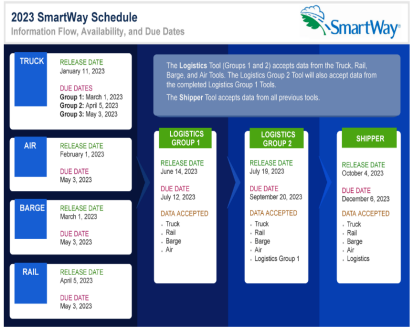
^ SmartWay.Canada@NRCan-RNCan.gc.ca

Assistance

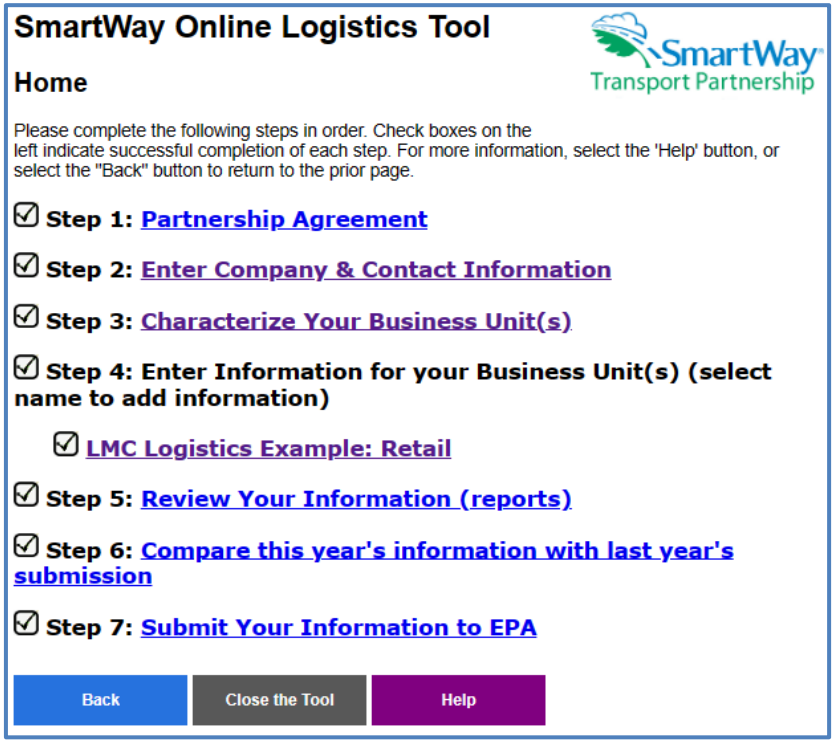


- SmartWay Portal
  - https://app4.erg.com/smartwayweb/portal/login.cfm?language=ENG
  - User Guide
  - Technical Document
  - Example Tool





Logistics Tool Basics - Home Screen



- Partnership agreement
  - No change from previous years
- Company Contact Information
  - Need Quality staff for Working contact; best if good with data management
  - Engaged Executive contact
  - Options for sustainability or other contacts
- Characterize your Business Units
  - Remember to create Business Units that correspond to how your customers hire you.
  - Most Logistics have 1 Business Unit

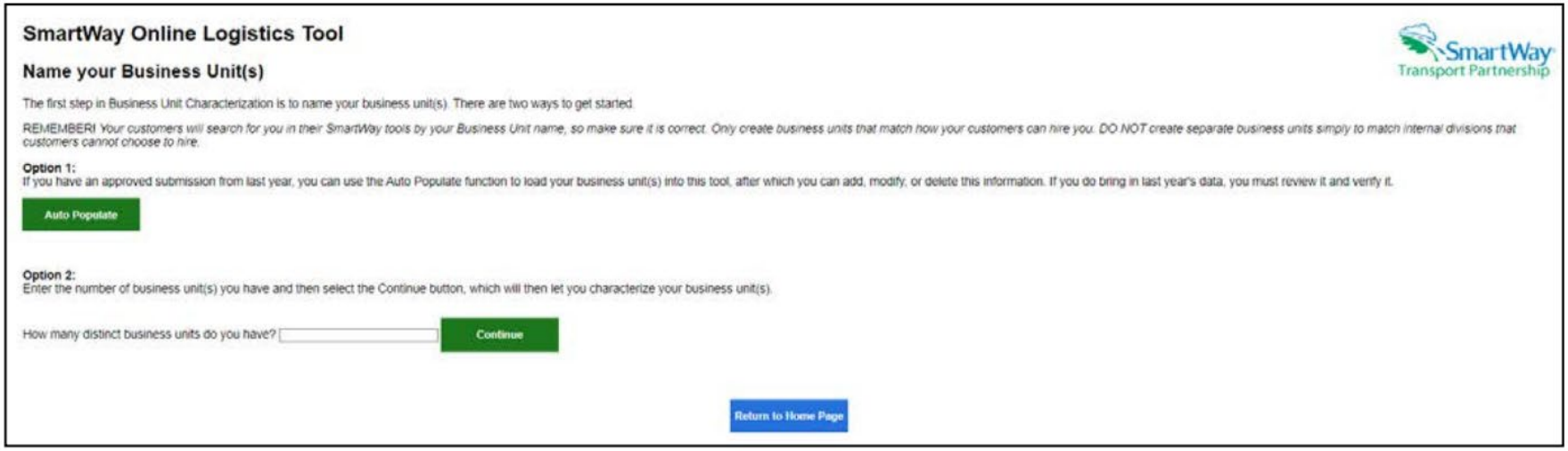
Contact Information

- **A Working Contact** for any questions about your company's participation and tool submissions. The **Working Contact** is the individual designated by the Executive Contact to directly interface with SmartWay regarding specific tasks involved in the timely submission of the tool. The Working Contact is responsible for coordinating the assembly of information to complete/update carrier activity data; completing and updating the tool itself; maintaining direct communication with SmartWay; and keeping interested parties within the company apprised of relevant developments with SmartWay.
- **An Executive Contact** for participation in recognition events and for authorizing participation in SmartWay. The **Executive Contact** is the company executive who is responsible for agreeing to the requirements in the SmartWay Partnership Annual Agreement, overseeing the Working Contact (as appropriate), and ensuring the timely submission of the tool to SmartWay. The Executive Contact also represents the company at awards/recognition events. This person should be a Vice President or higher-level representative for the company.
- **Additional contacts (optional)** which may include alternative Working or Executive contacts, Sustainability contacts, consultants, or others that may be involved with SmartWay (e.g., press/media contact, fleet manager, etc.). Use the "Add Contact" button at the bottom of the screen to enter one or more additional contacts.

STEP 3: CHARACTERIZE YOUR BUSINESS UNIT(S)

- Business Units are what your customers can hire
- They are not *internal* divisions

Figure 5. Name Your Business Unit(s) Screen

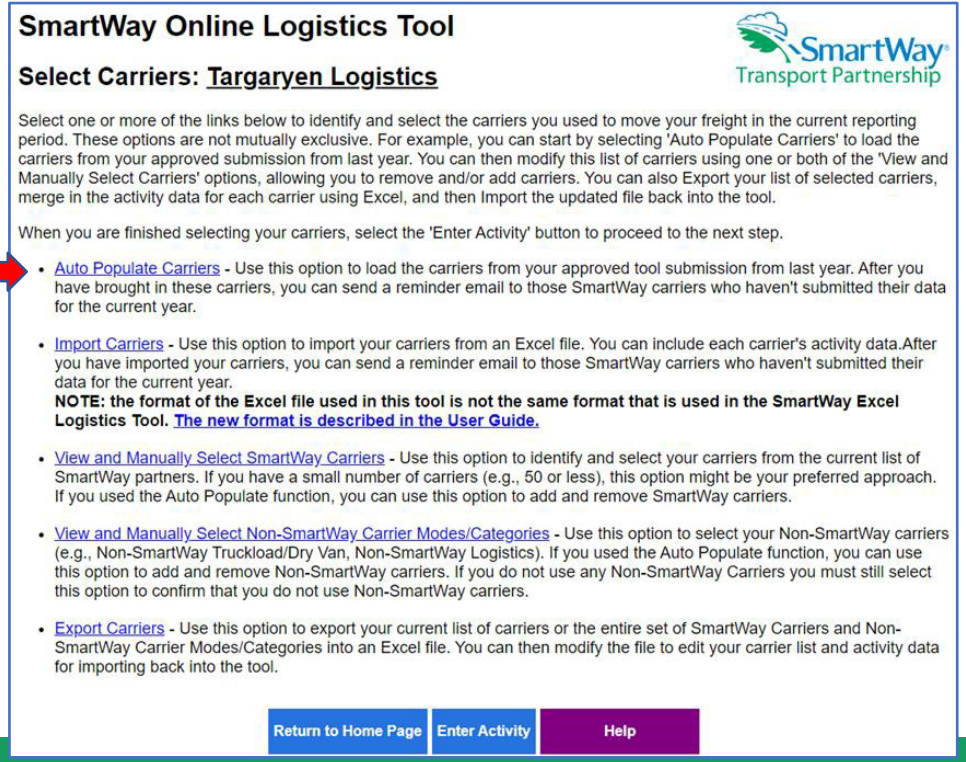


Logistics Tool: Step 4
Selecting Carriers & Entering Data

- Select your Carriers
  - Auto Populate
  - Import
  - Manually Select SmartWay Carriers
  - Manually Select Non-SmartWay
  - Export Carriers
- Add Activity Data
  - From Import
  - From Manual Entry

Select Carriers

- **Auto Populate**
- Import
- Manually Select SmartWay Carriers
- Manually Select Non-SmartWay
- Export Carriers



SmartWay Online Logistics Tool

SmartWay Transport Partnership

Select Carriers: Targaryen Logistics

Select one or more of the links below to identify and select the carriers you used to move your freight in the current reporting period. These options are not mutually exclusive. For example, you can start by selecting 'Auto Populate Carriers' to load the carriers from your approved submission from last year. You can then modify this list of carriers using one or both of the 'View and Manually Select Carriers' options, allowing you to remove and/or add carriers. You can also Export your list of selected carriers, merge in the activity data for each carrier using Excel, and then Import the updated file back into the tool.

When you are finished selecting your carriers, select the 'Enter Activity' button to proceed to the next step.

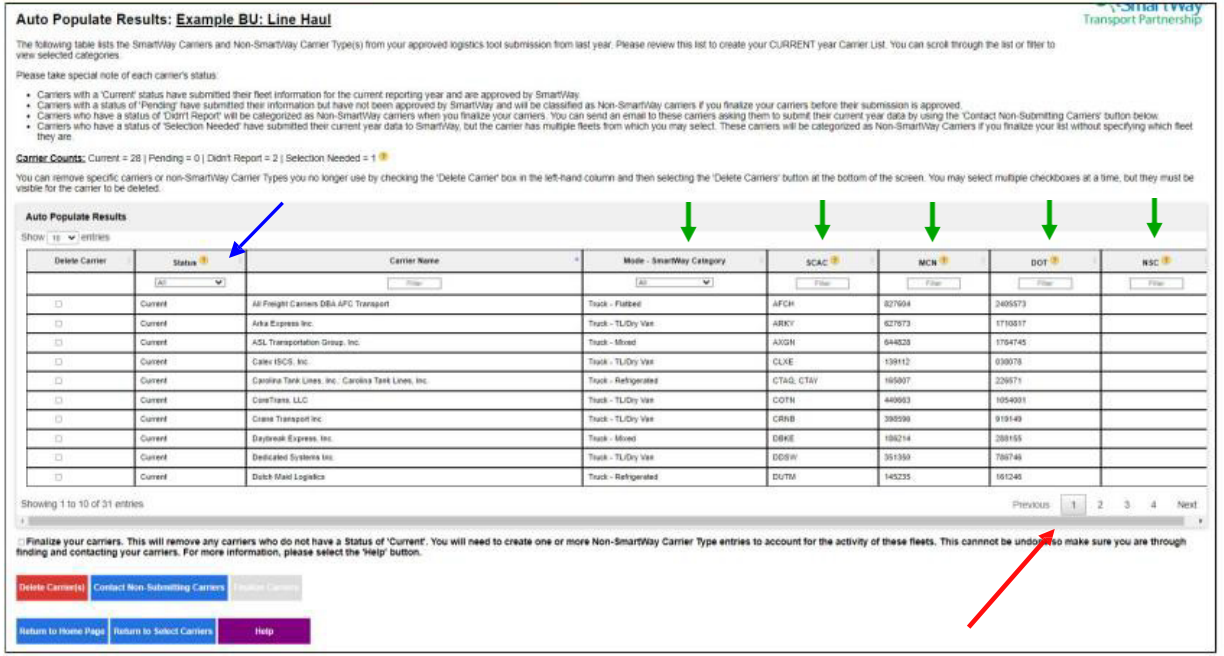
- Auto Populate Carriers - Use this option to load the carriers from your approved tool submission from last year. After you have brought in these carriers, you can send a reminder email to those SmartWay carriers who haven't submitted their data for the current year.
- Import Carriers - Use this option to import your carriers from an Excel file. You can include each carrier's activity data.After you have imported your carriers, you can send a reminder email to those SmartWay carriers who haven't submitted their data for the current year.
  NOTE: the format of the Excel file used in this tool is not the same format that is used in the SmartWay Excel Logistics Tool. The new format is described in the User Guide.
- View and Manually Select SmartWay Carriers - Use this option to identify and select your carriers from the current list of SmartWay partners. If you have a small number of carriers (e.g., 50 or less), this option might be your preferred approach. If you used the Auto Populate function, you can use this option to add and remove SmartWay carriers.
- View and Manually Select Non-SmartWay Carrier Modes/Categories - Use this option to select your Non-SmartWay carriers (e.g., Non-SmartWay Truckload/Dry Van, Non-SmartWay Logistics). If you used the Auto Populate function, you can use this option to add and remove Non-SmartWay carriers. If you do not use any Non-SmartWay Carriers you must still select this option to confirm that you do not use Non-SmartWay carriers.
- Export Carriers - Use this option to export your current list of carriers or the entire set of SmartWay Carriers and Non-SmartWay Carrier Modes/Categories into an Excel file. You can then modify the file to edit your carrier list and activity data for importing back into the tool.

Return to Home Page | Enter Activity | Help

Auto Populate

- Auto Populate pulls in your data from a previous year's submission
- You will still need to review and update your carriers as they may have changed from last year
- Could be on multiple **tabs**
- **Status** shows your carrier's SmartWay status- have they submitted?
- Includes **identifiers**

Figure 8: Auto Populate Carriers Screen



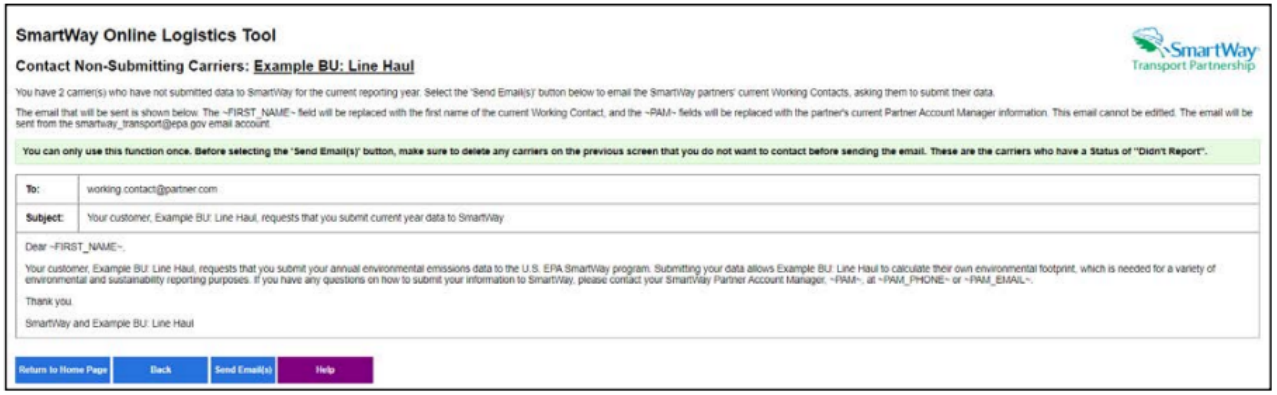
Auto Populate- Carrier Status

- Carriers with a “Current” status have submitted their fleet information for the current reporting year and are approved by SmartWay.
- Carriers with a status of 'Pending' have submitted their information but have not been approved by SmartWay and will be classified as non-SmartWay carriers if you finalize your imported carriers before their submission is approved.
- Carriers who have a status of 'Didn't Report' will be categorized as non-SmartWay carriers when you finalize your imported carriers. You can contact these carriers directly, or request SmartWay to send an email asking them to submit their current year data by using the 'Contact Non-Submitting Carriers' button below.
- Carriers who have a status of 'Selection Needed' have submitted current year data to SmartWay, but the carrier has multiple fleets from which you can select.

Non-reporting Carriers

Contact Non-Reporting Carriers Screen

Figure 11. Contact Non-Reporting Carriers Screen



Users may also send standardized emails to encourage SmartWay carriers with a "Didn't Report" status (i.e., with tools that have not been received for the current data year) to complete their tools and submit their data. Users will be able to view the email in read-only form. The email will be sent to all carriers on the "Didn't Report" list that can be identified as SmartWay partners. Emails will be sent to the Working Contact on record if they have a valid email address. If there is an Executive Contact with a valid email address they will be cc'd on the email. Emails cannot be edited and can only be sent once.

- **New feature:** If your carrier hasn't reported to SmartWay yet, you can send them an auto-reminder email!
- Standard text
- Can be sent once
- The more of your carriers that are in SmartWay, the better your emissions score will be
- You can always follow-up yourself as well

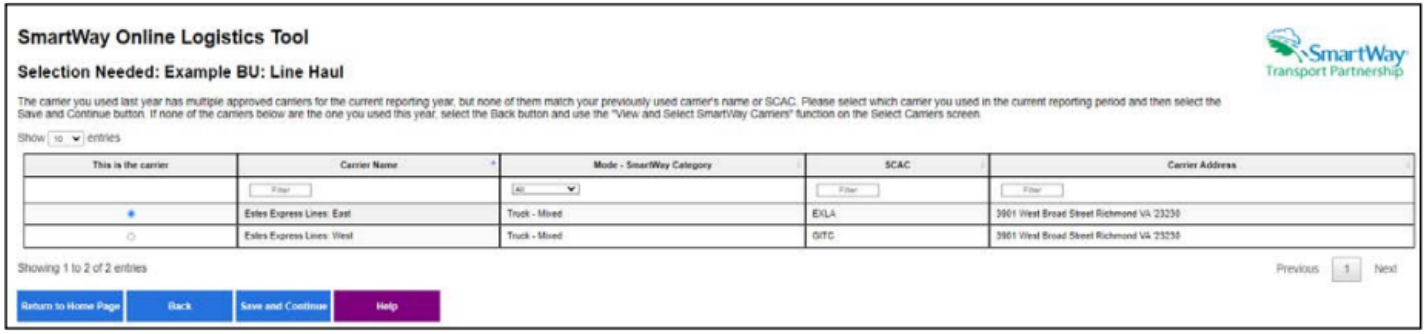
Auto Populate- Selection Needed

- There may be some similar looking carriers
- In that case you will be able to select the appropriate one from a list of found carriers
- Includes carrier address

Selection Needed Screen

For Auto Populated carriers with a status of "Selection Needed", partners can use the "Find My Carrier" link to select which of the current year approved fleets is the one used. Once identified, check the appropriate "This is the carrier box" on the right and select Save and Continue to proceed.

Figure 10. Selection Needed Screen



Remember to Finalize

- Please review your auto populate carriers closely
- Finalize if correct

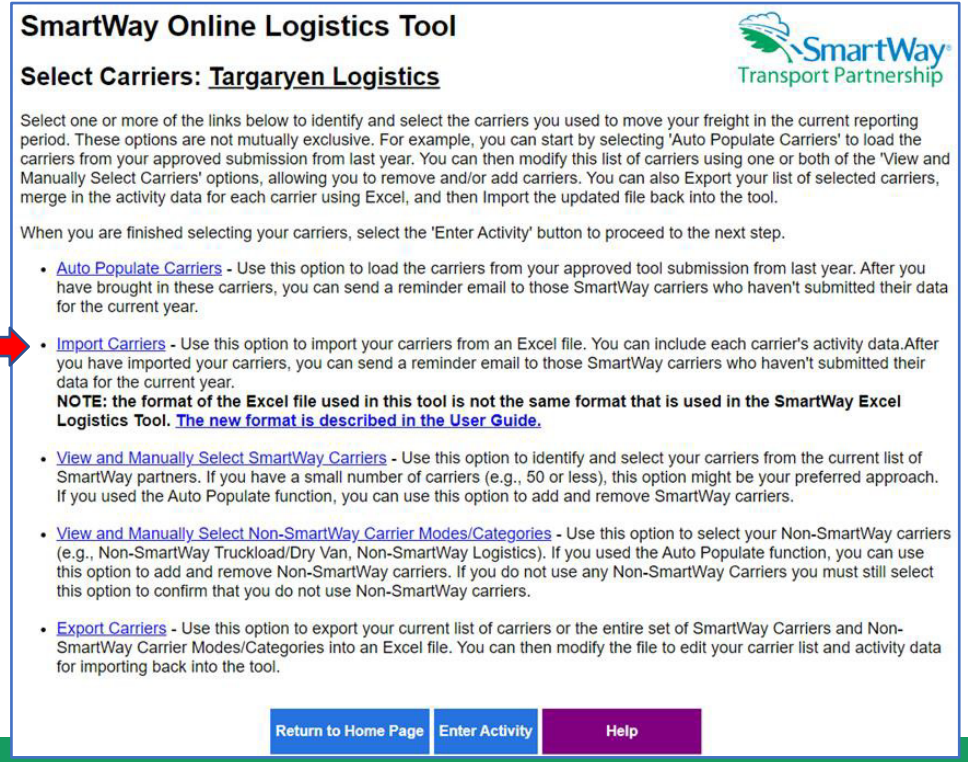
Finalize Auto Populated Carriers Screen

Figure 12. Finalize Auto Populated Carriers Screen

This screen summarizes the final status of each of your auto populated carriers, as well as a listing of actions taken by the tool.

Select Carriers

- Auto Populate
- **Import**
- Manually Select SmartWay Carriers
- Manually Select Non-SmartWay
- Export Carriers



SmartWay Online Logistics Tool

SmartWay Transport Partnership

Select Carriers: Targaryen Logistics

Select one or more of the links below to identify and select the carriers you used to move your freight in the current reporting period. These options are not mutually exclusive. For example, you can start by selecting 'Auto Populate Carriers' to load the carriers from your approved submission from last year. You can then modify this list of carriers using one or both of the 'View and Manually Select Carriers' options, allowing you to remove and/or add carriers. You can also Export your list of selected carriers, merge in the activity data for each carrier using Excel, and then Import the updated file back into the tool.

When you are finished selecting your carriers, select the 'Enter Activity' button to proceed to the next step.

- Auto Populate Carriers - Use this option to load the carriers from your approved tool submission from last year. After you have brought in these carriers, you can send a reminder email to those SmartWay carriers who haven't submitted their data for the current year.
- Import Carriers - Use this option to import your carriers from an Excel file. You can include each carrier's activity data.After you have imported your carriers, you can send a reminder email to those SmartWay carriers who haven't submitted their data for the current year.
  NOTE: the format of the Excel file used in this tool is not the same format that is used in the SmartWay Excel Logistics Tool. The new format is described in the User Guide.
- View and Manually Select SmartWay Carriers - Use this option to identify and select your carriers from the current list of SmartWay partners. If you have a small number of carriers (e.g., 50 or less), this option might be your preferred approach. If you used the Auto Populate function, you can use this option to add and remove SmartWay carriers.
- View and Manually Select Non-SmartWay Carrier Modes/Categories - Use this option to select your Non-SmartWay carriers (e.g., Non-SmartWay Truckload/Dry Van, Non-SmartWay Logistics). If you used the Auto Populate function, you can use this option to add and remove Non-SmartWay carriers. If you do not use any Non-SmartWay Carriers you must still select this option to confirm that you do not use Non-SmartWay carriers.
- Export Carriers - Use this option to export your current list of carriers or the entire set of SmartWay Carriers and Non-SmartWay Carrier Modes/Categories into an Excel file. You can then modify the file to edit your carrier list and activity data for importing back into the tool.

Return to Home Page | Enter Activity | Help

Import (Carrier + Activity)

Import Carriers Screen

Business units that use a large number of carriers (e.g., greater than 100) during the reporting year may prefer to prepare their carrier activity data using an offline application such as Excel, incorporating data outputs from their own freight management software or related data systems. Users may import an XLSX file containing carrier data using the Import File button on the Import Carriers screen. The import file may be produced by:

1. Exporting carrier data from last year's Excel tool
2. Selecting Auto Populate and/or Manually Selecting Carriers then using the tool's Export function, or
3. Exporting carrier data from an in-house application.

Details regarding the required import file data fields and format are presented in Appendix A.

Once the file is ready, select the Import File button to navigate
import the file, validate activity data, and report any errors and/
addressed.

- Can save time
- Need to follow the template and instructions <u>exactly</u>

Figure 13. Importing Carriers Screen

Sample Import File

- You MUST follow the form exactly!
- Do not change or move headers.
- There is additional guidance in the User Guide – Appendix A: Import File Preparation

CARRIER_ID	CARRIER_NAME	CARRIER_MODE	SCAC	MCN	DOT	NSC	AVAILABLE_ACTIVITY_DATA	PAYLOAD_DISTANCE	DISTANCE	AVERAGE_PAYLOAD	NON_SW_CARRIER_COUNT	PARTNER_CARRIER_ID
59,843	A & H Cartage, Inc.	Truck	AHCG	196753	296708							
61,540	A 7 Transport Expedited LLC	Truck	ASVE	954297	2846156							
59,004	A and S Transport Inc.	Truck	ANSK	1351254	3777827							
59,328	A&I Express Inc.	Truck	AIEP	629066	1715071							
59,324	A&I Transport Inc.	Truck	AITT	629165	1715348							
58,732	A&M Logistics Solutions, Inc. DBA DK Express	Truck	DEXG	505056	1301596							
60,474	A&M Transport, LLC: Dry Van Fleet	Truck	ALKM	217072	344894							
60,472	A&M Transport, LLC: Flatbed Fleet	Truck	ALKM, AFLJ	217072	344894							
60,473	A&M Transport, LLC: Tautliner Fleet	Truck	ALKM	217072	344894							

Import Results - Status

The Import Results screen lists all carriers included in the imported Excel file, along with the submittal status for each. You can remove carriers from the list by checking the Delete Carrier(s) box and then selecting the "Delete Carrier(s)" button at the bottom of the screen. Carrier status types include:

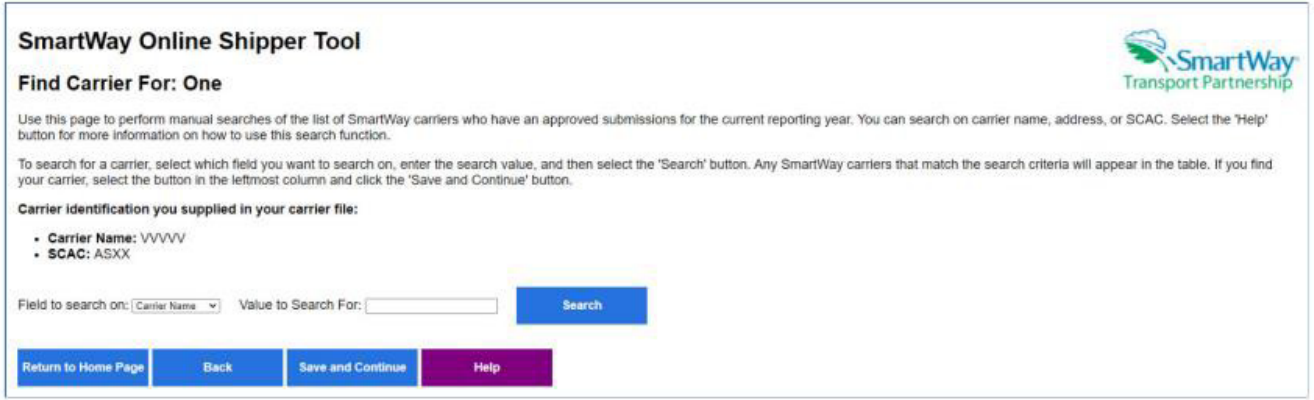
- "Current" carriers have an approved SmartWay tool submittal for the current Data Year.
- "Pending" carriers are SmartWay partners that have submitted their data for this reporting year, which is currently under review by SmartWay.
- "Didn't Report" carriers are SmartWay partners but have not submitted their data for the current reporting year.
- "Not Found" carriers could not be matched to the list of current SmartWay partners based on the information provided.

Imported: Not Found

Find Carrier Screen

For imported carriers that were "Not Found" on the list of current SmartWay Carriers, partners can use the "Find My Carrier" function to search for a match. You may search on multiple fields (Carrier Name, SCAC, or carrier address). If the correct carrier is listed in the search results, select the "This is the carrier" button, then select Save and Continue and the selection will be added to your carrier list with a status of "Current".

Figure 14: Find Carrier Screen



- You can always add manually later if that is easier.
- The bigger the percentage of your freight that any particular carrier hauls, the more important it is to include them on your list.

Search and Sort Criteria

- Carrier Name
- Carrier ID
- SCAC
- MCN
- DOT
- NSC (Canadian companies)
- Partner Carrier ID (An ID you assigned to your carriers previously)

Import Results

SmartWay Online Logistics Tool

Import Results: Targaryen Logistics

The following table displays the SmartWay Carriers and Non-SmartWay Carrier Type(s) from the file you just imported. To review these results, you can scroll through the list or use the filters in the first row. Select the 'Help' button at the bottom of the page if you have any questions about how to use the filters.

Please take special note of each carrier's status:

- Carriers with a 'Current' status have submitted their fleet information for the current reporting year and are approved by SmartWay.
- Carriers with a status of 'Pending' have submitted their information but have not been approved by SmartWay and will be classified as Non-SmartWay carriers if you finalize your carriers before their submission is approved.
- Carriers who have a status of 'Didn't Report' will be categorized as Non-SmartWay carriers when you finalize your carriers. You can send an email to these carriers asking them to submit their current year data by using the 'Contact Non-Submitting Carriers' button below.
- Carriers who have a status of 'Not Found' were not located in the SmartWay database. If you believe they are a current SmartWay carrier, select the 'FIND CARRIER' link next to their name and you can search for them. If you find them, their Status will be updated. If you don't find them they will be dropped from your list when you 'Finalize Carriers' and you will need to account for their activity by adding them as Non-SmartWay carriers.

Carrier Counts: Current = 9 | Pending = 0 | Didn't Report = 0 | Not Found = 0

You can remove any carriers accidently imported by checking the box in the Delete Carrier(s) column and selecting the 'Delete Carrier(s)' button. You may select multiple checkboxes at a time, but they must be visible for the carrier to be deleted.

▼ Import Results

Show 10 entries

Delete Carrier(s)	Status	Carrier Name (From Excel File)	Carrier Name (From SmartWay)	Mode - SmartWay Category	SCAC	MCN	DOT	NSC
	All	Filter	Filter	All	Filter	Filter	Filter	Filter
☐	Current	A & H Cartage, Inc.	A & H Cartage, Inc.	Truck - LTL/Dry Van	AHCG	196753	296708	
☐	Current	A 7 Transport Expedited LLC	A 7 Transport Expedited LLC	Truck - Mixed	ASVE	954297	2846156	
☐	Current	A and S Transport Inc.	A and S Transport Inc.	Truck - Flatbed	ANSK	1351254	3777827	
☐	Current	A&I Express Inc.	A&I Express Inc.	Truck - Refrigerated	AIEP	629066	1716071	
☐	Current	A&I Transport Inc.	A&I Transport Inc.	Truck - Refrigerated	AITT	629165	1715348	
☐	Current	A&M Logistics Solutions, Inc. DBA DK Express	A&M Logistics Solutions, Inc. DBA DK Express	Truck - Dray	DEXG	506056	1301696	
☐	Current	A&M Transport, LLC: Dry Van Fleet	A&M Transport, LLC: Dry Van Fleet	Truck - TL/Dry Van	ALKM	217072	344894	
☐	Current	A&M Transport, LLC: Flatbed Fleet	A&M Transport, LLC: Flatbed Fleet	Truck - Flatbed	ALKM, AFLJ	217072	344894	
☐	Current	A&M Transport, LLC: Tautliner Fleet	A&M Transport, LLC: Tautliner Fleet	Truck - Flatbed	ALKM	217072	344894	

Showing 1 to 9 of 9 entries

Previous 1 Next

☐ **Finalize your carriers. This will remove any carriers who do not have a Status of 'Current'. You will need to create one or more Non-SmartWay Carrier Type entries to account for the activity of these fleets. This cannnot be undone so make sure you are through finding and contacting your carriers. For more information, please select the 'Help' button.**

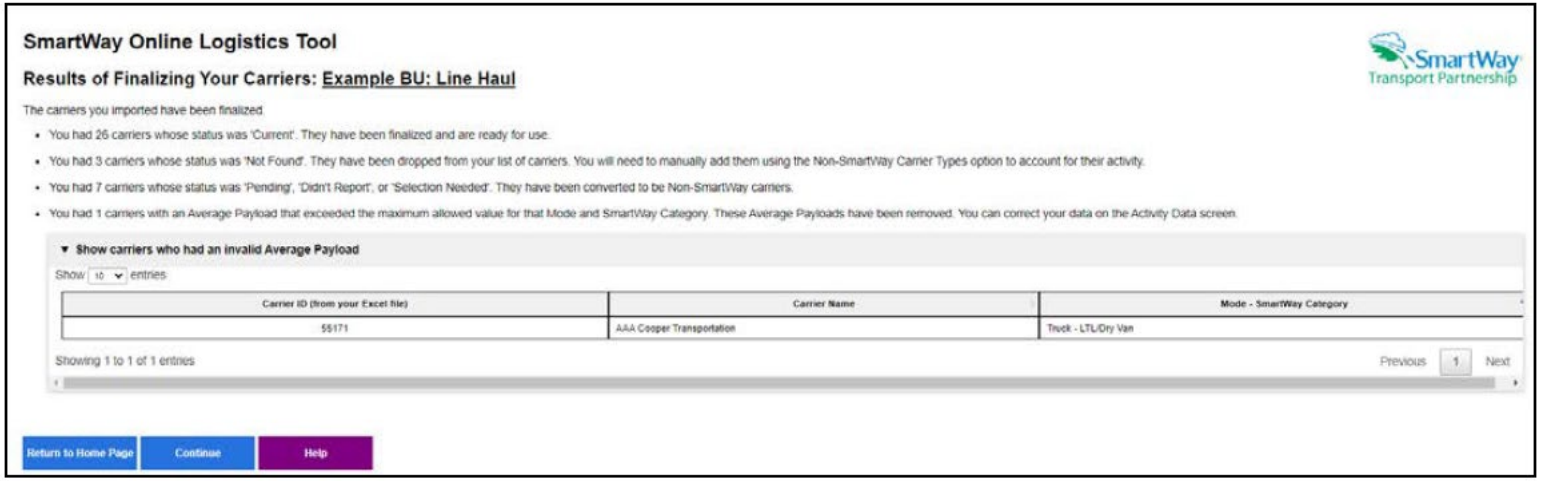
Delete Carrier(s) | Contact Non-Submitting Carriers | Finalize Carriers

Return to Home Page | Return to Select Carriers | Help

If you have questions regarding the SmartWay Transport Partnership, contact your Partner Account Manager, Matt Payne, at (734)214-4576 or payne.matthew@epa.gov.

Finalize Import

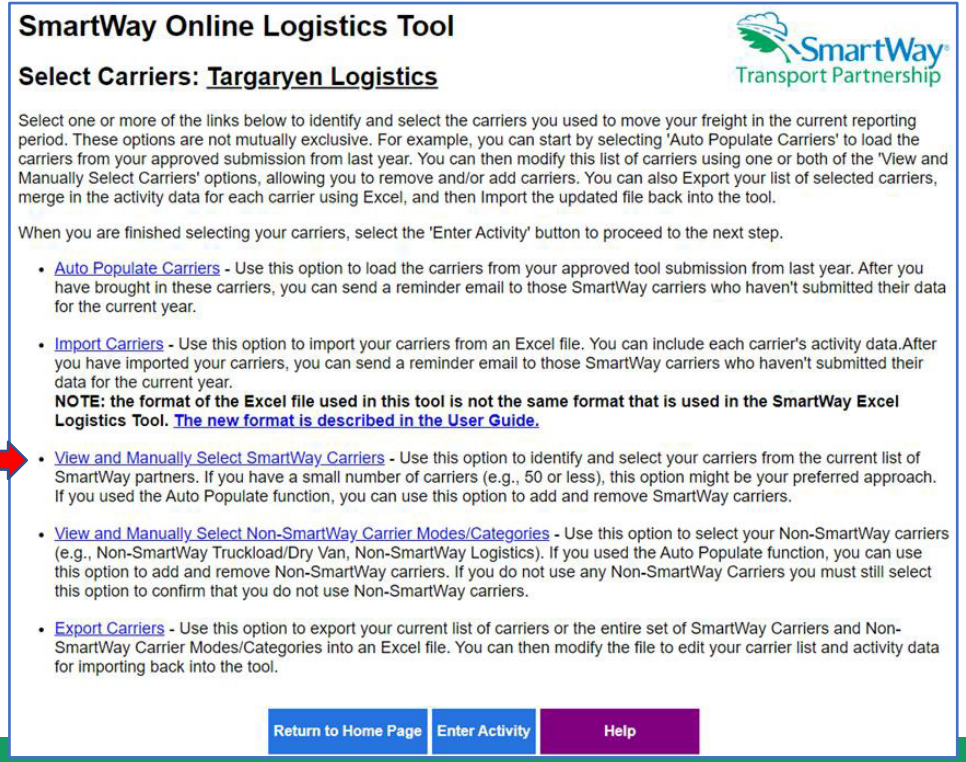
Figure 16. Finalize Imported Carriers Screen



- Any carriers that were not already identified as non-SmartWay carriers and that have a status of “Pending” or “Didn’t Report” will be added as non-SmartWay carriers

Select Carriers

- Auto Populate
- Import
- **Manually Select SmartWay Carriers**
- Manually Select Non-SmartWay
- Export Carriers



SmartWay Online Logistics Tool

SmartWay Transport Partnership

Select Carriers: Targaryen Logistics

Select one or more of the links below to identify and select the carriers you used to move your freight in the current reporting period. These options are not mutually exclusive. For example, you can start by selecting 'Auto Populate Carriers' to load the carriers from your approved submission from last year. You can then modify this list of carriers using one or both of the 'View and Manually Select Carriers' options, allowing you to remove and/or add carriers. You can also Export your list of selected carriers, merge in the activity data for each carrier using Excel, and then Import the updated file back into the tool.

When you are finished selecting your carriers, select the 'Enter Activity' button to proceed to the next step.

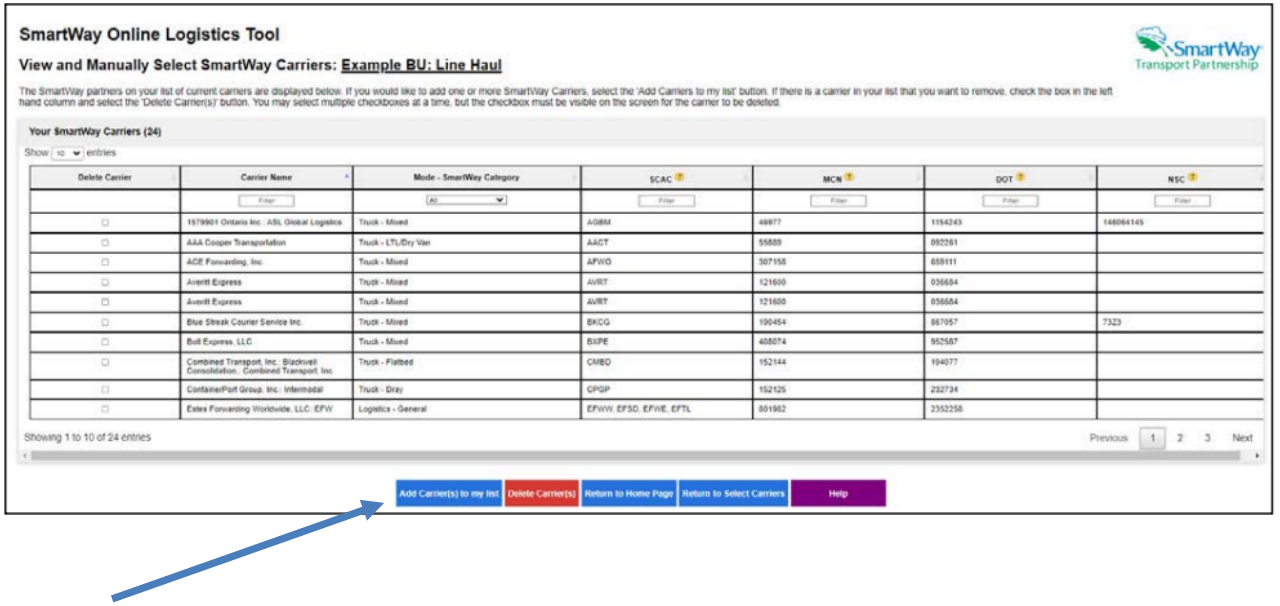
- Auto Populate Carriers - Use this option to load the carriers from your approved tool submission from last year. After you have brought in these carriers, you can send a reminder email to those SmartWay carriers who haven't submitted their data for the current year.
- Import Carriers - Use this option to import your carriers from an Excel file. You can include each carrier's activity data.After you have imported your carriers, you can send a reminder email to those SmartWay carriers who haven't submitted their data for the current year.
  NOTE: the format of the Excel file used in this tool is not the same format that is used in the SmartWay Excel Logistics Tool. The new format is described in the User Guide.
- View and Manually Select SmartWay Carriers - Use this option to identify and select your carriers from the current list of SmartWay partners. If you have a small number of carriers (e.g., 50 or less), this option might be your preferred approach. If you used the Auto Populate function, you can use this option to add and remove SmartWay carriers.
- View and Manually Select Non-SmartWay Carrier Modes/Categories - Use this option to select your Non-SmartWay carriers (e.g., Non-SmartWay Truckload/Dry Van, Non-SmartWay Logistics). If you used the Auto Populate function, you can use this option to add and remove Non-SmartWay carriers. If you do not use any Non-SmartWay Carriers you must still select this option to confirm that you do not use Non-SmartWay carriers.
- Export Carriers - Use this option to export your current list of carriers or the entire set of SmartWay Carriers and Non-SmartWay Carrier Modes/Categories into an Excel file. You can then modify the file to edit your carrier list and activity data for importing back into the tool.

Return to Home Page | Enter Activity | Help

Manually Select SmartWay Carriers

- Best for Logistics companies who have fewer than 100 carriers
- Simply Select, Add, and then Input activity data later

Figure 17. View and Manually Select SmartWay Carriers Screen



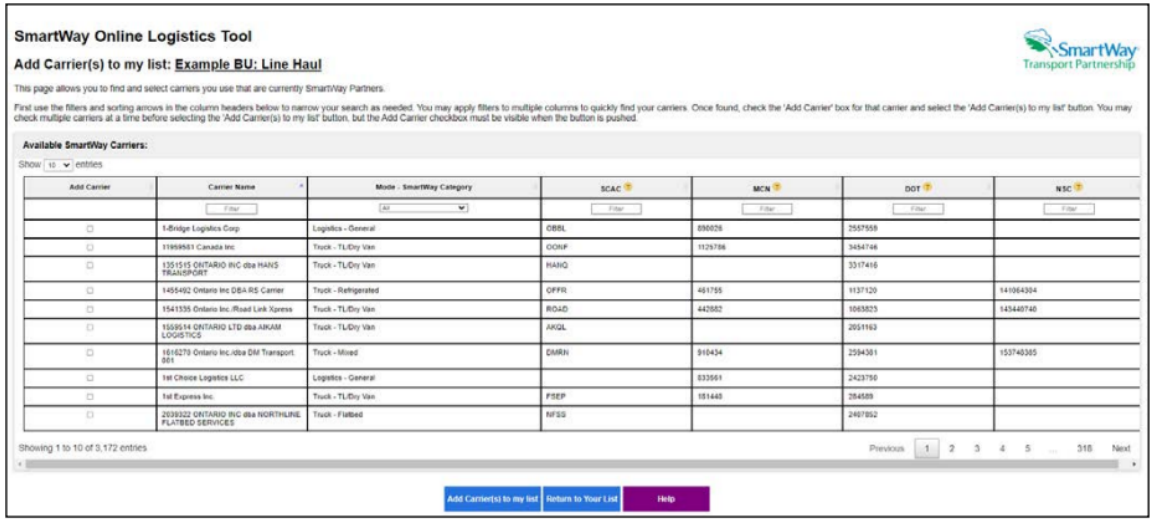
Manually Select SmartWay Carriers

- Multiple ways to narrow your SmartWay carrier selection
- Alpha sort
- SCAC
- MCN
- DOT
- NSC
- Truck Category

Add SmartWay Carriers Screen

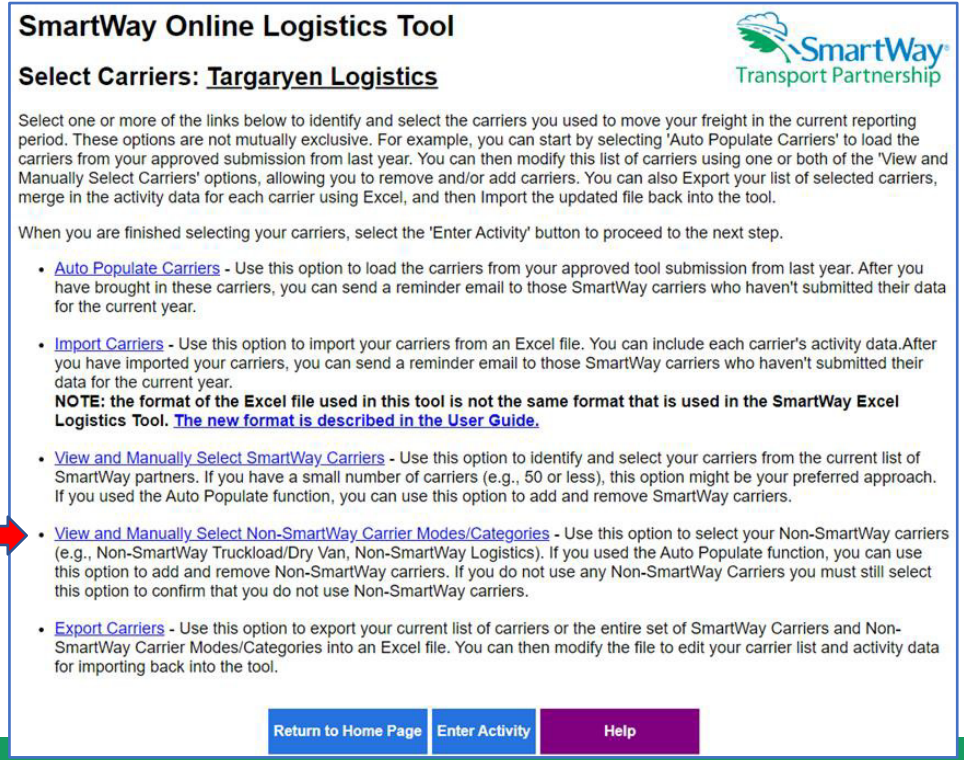
Use this page to find and select SmartWay Partners using the filters and sort arrows in the column headers to narrow your search as needed. Check the Add Carrier box to the left to select specific carriers. When finished click the Add Carrier(s) to My List button to see your carriers.

Figure 18. Add SmartWay Carriers to My List Screen



Select Carriers

- Auto Populate
- Import
- Manually Select SmartWay Carriers
- **Manually Select Non-SmartWay**
- Export Carriers



SmartWay Online Logistics Tool

SmartWay Transport Partnership

Select Carriers: Targaryen Logistics

Select one or more of the links below to identify and select the carriers you used to move your freight in the current reporting period. These options are not mutually exclusive. For example, you can start by selecting 'Auto Populate Carriers' to load the carriers from your approved submission from last year. You can then modify this list of carriers using one or both of the 'View and Manually Select Carriers' options, allowing you to remove and/or add carriers. You can also Export your list of selected carriers, merge in the activity data for each carrier using Excel, and then Import the updated file back into the tool.

When you are finished selecting your carriers, select the 'Enter Activity' button to proceed to the next step.

- Auto Populate Carriers - Use this option to load the carriers from your approved tool submission from last year. After you have brought in these carriers, you can send a reminder email to those SmartWay carriers who haven't submitted their data for the current year.
- Import Carriers - Use this option to import your carriers from an Excel file. You can include each carrier's activity data.After you have imported your carriers, you can send a reminder email to those SmartWay carriers who haven't submitted their data for the current year.
  NOTE: the format of the Excel file used in this tool is not the same format that is used in the SmartWay Excel Logistics Tool. The new format is described in the User Guide.
- View and Manually Select SmartWay Carriers - Use this option to identify and select your carriers from the current list of SmartWay partners. If you have a small number of carriers (e.g., 50 or less), this option might be your preferred approach. If you used the Auto Populate function, you can use this option to add and remove SmartWay carriers.
- View and Manually Select Non-SmartWay Carrier Modes/Categories - Use this option to select your Non-SmartWay carriers (e.g., Non-SmartWay Truckload/Dry Van, Non-SmartWay Logistics). If you used the Auto Populate function, you can use this option to add and remove Non-SmartWay carriers. If you do not use any Non-SmartWay Carriers you must still select this option to confirm that you do not use Non-SmartWay carriers.
- Export Carriers - Use this option to export your current list of carriers or the entire set of SmartWay Carriers and Non-SmartWay Carrier Modes/Categories into an Excel file. You can then modify the file to edit your carrier list and activity data for importing back into the tool.

Return to Home Page | Enter Activity | Help

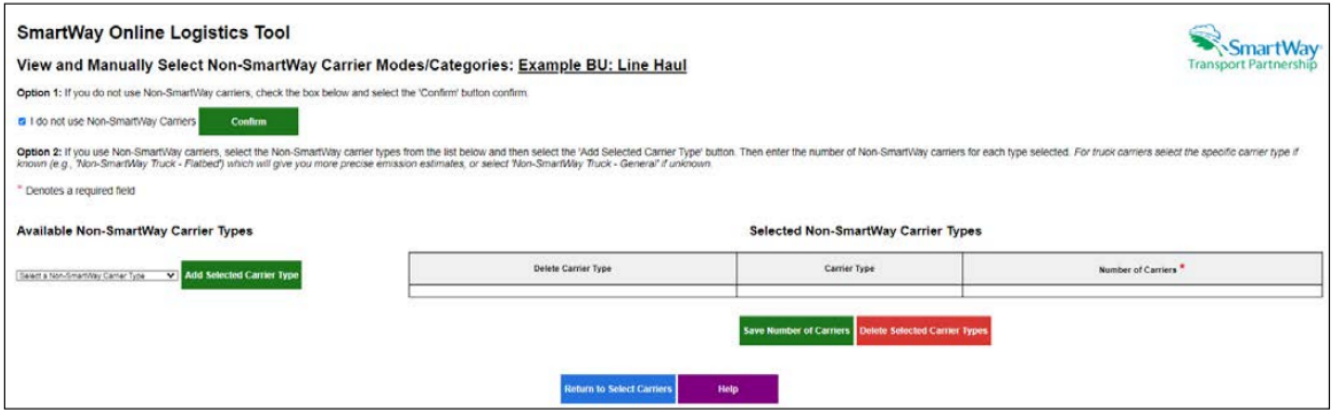
Non-SmartWay

- Remember to add your non-SmartWay carriers!
- Most companies use some non-SmartWay carriers

View and Manually Select Non-SmartWay Carrier Modes/Categories Screen

If you only use SmartWay carriers, select **Option 1**, the "I do not use any Non-SmartWay Carriers" box and select Confirm to proceed. (If you wish to enter Non-SmartWay carriers after selecting Option 1, uncheck the "I do not use Non-SmartWay Carriers box" and select Confirm.)

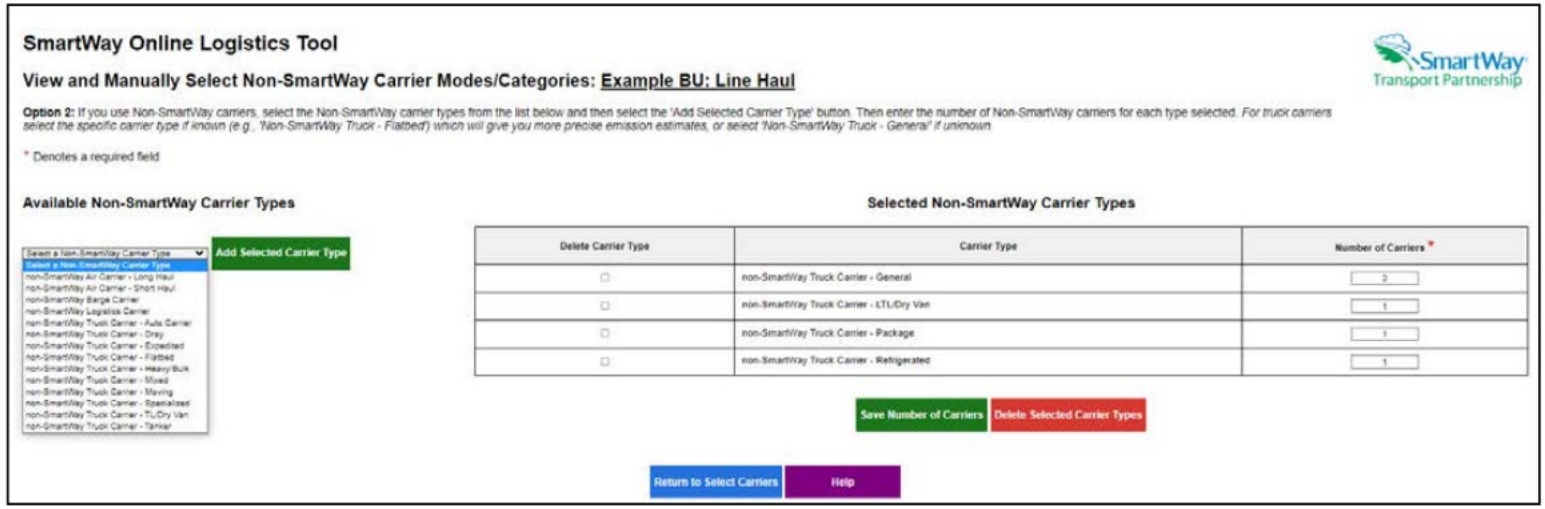
Figure 19. Manually Select Non-SmartWay Carrier Modes/Categories Screen, Option 1



Non-SmartWay

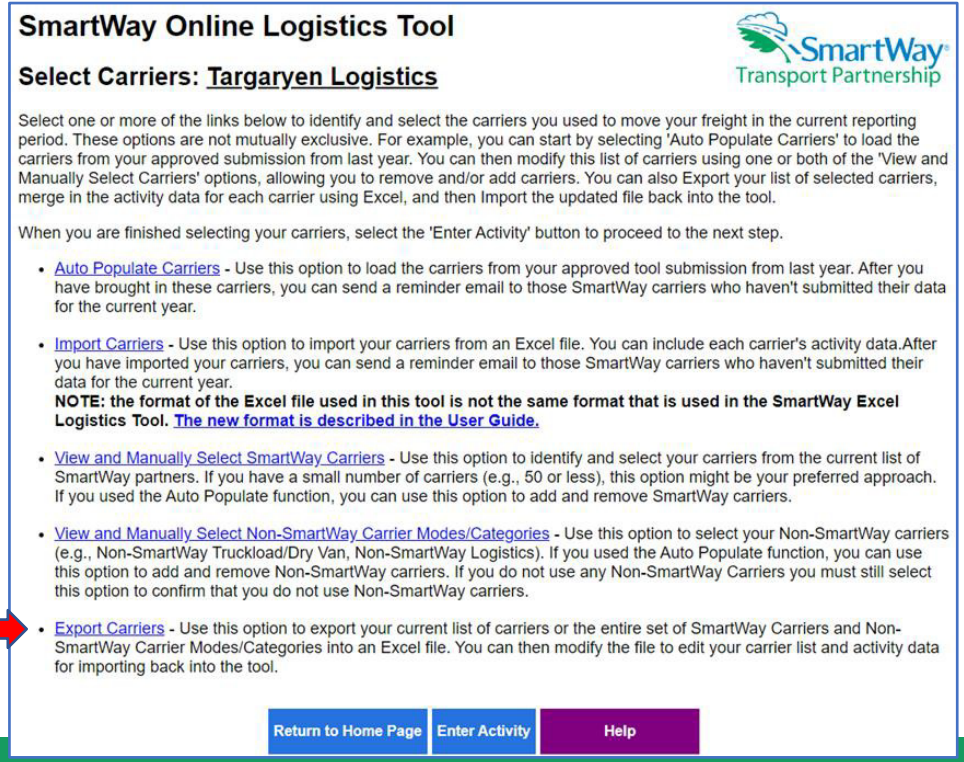
- Select your non-SmartWay
- Note: You only need to identify the type of non-SmartWay, you do not need to individually identify each non-SmartWay carrier

Figure 20. Manually Select Non-SmartWay Carrier Modes/Categories Screen, Option 2



Select Carriers

- Auto Populate
- Import
- Manually Select SmartWay Carriers
- Manually Select Non-SmartWay
- **Export Carriers**



SmartWay Online Logistics Tool

SmartWay Transport Partnership

Select Carriers: Targaryen Logistics

Select one or more of the links below to identify and select the carriers you used to move your freight in the current reporting period. These options are not mutually exclusive. For example, you can start by selecting 'Auto Populate Carriers' to load the carriers from your approved submission from last year. You can then modify this list of carriers using one or both of the 'View and Manually Select Carriers' options, allowing you to remove and/or add carriers. You can also Export your list of selected carriers, merge in the activity data for each carrier using Excel, and then Import the updated file back into the tool.

When you are finished selecting your carriers, select the 'Enter Activity' button to proceed to the next step.

- Auto Populate Carriers - Use this option to load the carriers from your approved tool submission from last year. After you have brought in these carriers, you can send a reminder email to those SmartWay carriers who haven't submitted their data for the current year.
- Import Carriers - Use this option to import your carriers from an Excel file. You can include each carrier's activity data.After you have imported your carriers, you can send a reminder email to those SmartWay carriers who haven't submitted their data for the current year.
  NOTE: the format of the Excel file used in this tool is not the same format that is used in the SmartWay Excel Logistics Tool. The new format is described in the User Guide.
- View and Manually Select SmartWay Carriers - Use this option to identify and select your carriers from the current list of SmartWay partners. If you have a small number of carriers (e.g., 50 or less), this option might be your preferred approach. If you used the Auto Populate function, you can use this option to add and remove SmartWay carriers.
- View and Manually Select Non-SmartWay Carrier Modes/Categories - Use this option to select your Non-SmartWay carriers (e.g., Non-SmartWay Truckload/Dry Van, Non-SmartWay Logistics). If you used the Auto Populate function, you can use this option to add and remove Non-SmartWay carriers. If you do not use any Non-SmartWay Carriers you must still select this option to confirm that you do not use Non-SmartWay carriers.
- Export Carriers - Use this option to export your current list of carriers or the entire set of SmartWay Carriers and Non-SmartWay Carrier Modes/Categories into an Excel file. You can then modify the file to edit your carrier list and activity data for importing back into the tool.

Return to Home Page | Enter Activity | Help

Export

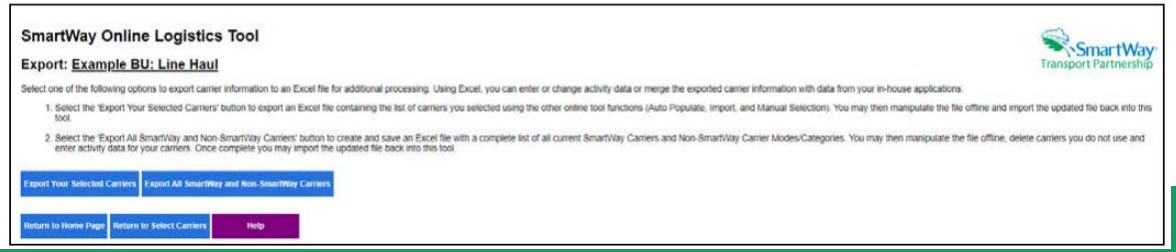
Export Carriers Screen

You may export carrier information to an Excel file for additional processing. Using Excel, you can enter or change Activity Data or merge the exported carrier information with data from your in-house shipping applications. There are two options for exporting carriers.

1. You may select the "Export All SmartWay and non-SmartWay Carriers" button to create and save an Excel file with a complete list of all current SmartWay Carriers and non-SmartWay Carrier Modes/Categories. You may then manipulate the file offline, deleting carriers you do not use, and entering activity data for your carriers. Once complete you may import the updated file back into this online logistics tool.
2. You may export the list of carriers selected using the other online tool functions (Auto Populate, Import, and Manual Selection). Once you have created your list of carriers, you can use the "Export Selected Carriers" button to create and save an Excel containing these carriers.

- Nice to Save for Next year
- Good for additional analysis
- Export can be used as a basis for sorting and importing too.

Figure 21. Export Carriers Screen



Export File

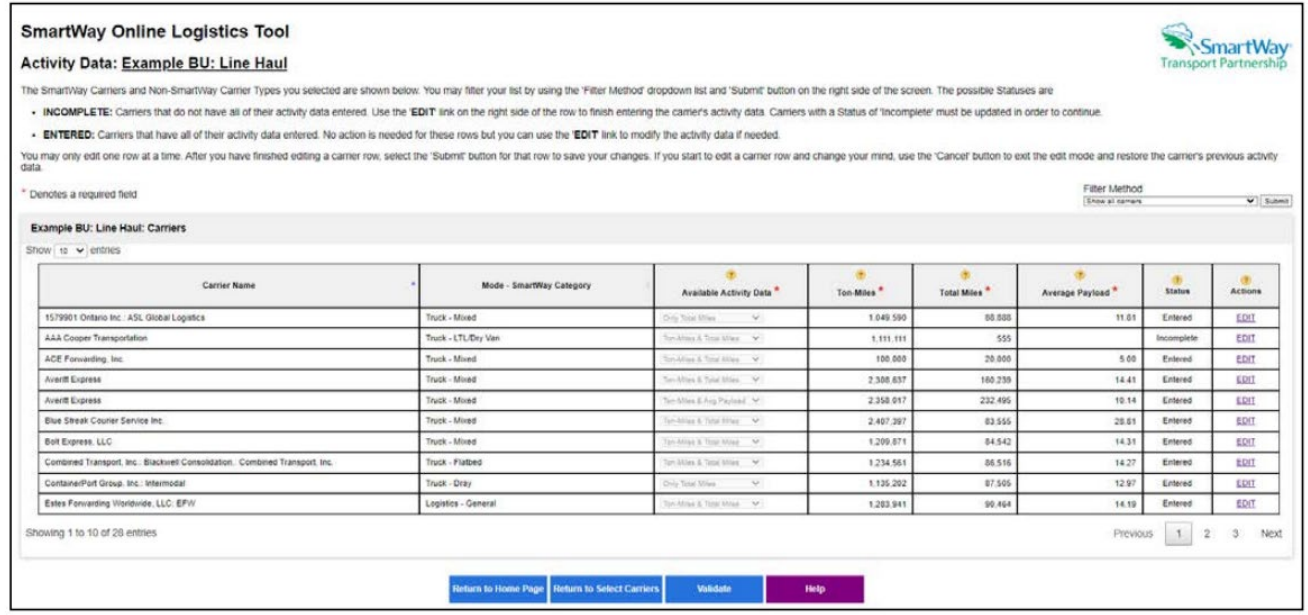
- Note the format is the same as Import.
- Some carriers that have small changes in their carrier base prefer to export their previous year's carriers and modify them for import
- Even if your carriers are the same year to year, your Activity data will change

CARRIER_ID	CARRIER_NAME	CARRIER_MODE	SCAC	MCN	DOT	NSC	AVAILABLE_ACTIVITY_DATA	PAYLOAD_DISTANCE	DISTANCE	AVERAGE_PAYLOAD	NON_SW_CARRIER_COUNT	PARTNER_CARRIER_ID
59843	A & H Cartage, Inc.	Truck	AHCG	196753	296708		b	123456	6172	20		
61540	A 7 Transport Expedited LLC	Truck	ASVE	954297	2846156		b	2345670	120290	19.5		
59004	A and S Transport Inc.	Truck	ANSK	1351254	3777827		b	3456789	164609	21		
59328	A&I Express Inc.	Truck	AIEP	629066	1715071		a	2000000	100001	19.9998		
59324	A&I Transport Inc.	Truck	AITT	629165	1715348		a	3000005	151001	19.86745121		
58732	A&M Logistics Solutions, Inc. DBA DK Express	Truck	DEXG	505056	1301596		a	4000004	200222	19.97784459		
60474	A&M Transport, LLC: Dry Van Fleet	Truck	ALKM	217072	344894		c	5500110	250005	22		
60472	A&M Transport, LLC: Flatbed Fleet	Truck	ALKM, AFLJ	217072	344894		c	8500085	500005	17		
60473	A&M Transport, LLC: Tautliner Fleet	Truck	ALKM	217072	344894		d	7697770	444444	17.32		
3000000023	BNSF Railway Company	Rail					a	55555555	999999	55.55561056		
-1	non-SmartWay Truck Carrier - General	Truck					d	68533406	4251452	16.12	5	

Entering Activity Data

- Manual entering of Activity Data
- Select “Edit”
- Choose Input type
  - Ton-miles and miles
  - Ton-miles and Payload
  - Miles and Payload
  - Total Miles (Truck)
- Enter Activity Data
- Repeat

Figure 22. Activity Screen

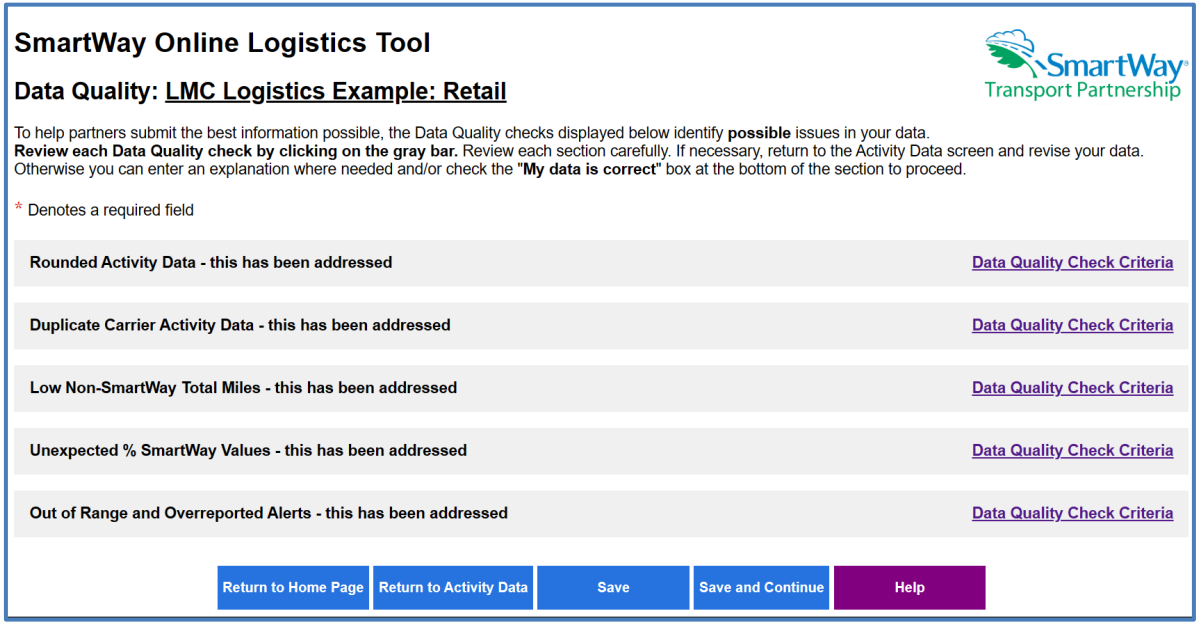


Activity Data Tips

- Enter the amount of freight per carrier fleet- NOT per shipment. If you input by shipment (possibly millions of lines of data- you will likely get a failure, and if not- your PAM will not be able to approve.)
- Watch the results- if you enter miles and ton-miles, look at the calculated payload. A payload of 1,000 tons on a dry-van truck means an error exists. *(Note: This will also be flagged during the proceeding data validation checks.)*
- When you collect your data- sort it by most used carrier to least and see if the trend makes sense- do you see a small carrier with too much freight?
- Establish an annual data reporting and retrieval system that you systematize and pass onto future employees who are responsible for your SmartWay submission

Data Quality Checks

- The tool includes many data quality checks to ensure accurate data entry
  - Rounded numbers
  - Duplicate entries
  - Low non-SmartWay miles
  - Unexpected SmartWay %
  - Out of Range and over reported alerts
- Click on the Data Quality category to see the details of issues that need to be addressed



Out of Range Alerts

Out of Range and Overreported Alerts - this has been addressed — Data Quality Check Criteria

Payload Out of Range Alert: 'Yellow' and 'Red' entries in the Payload Out of Range Alert column indicate the average payload for a carrier is outside the expected range for typical carriers of the same Mode/SmartWay Category. 'Red' indicates payloads are far outside the expected range, while 'Yellow' indicates payloads are somewhat outside the expected range. Select the EDIT link to adjust your payload values if needed, otherwise you can enter explanations in the "Out of Range Explanation(s)" box below. Red entries require an explanation, while explanations for yellow entries are optional.

Overreported Alert: 'Red' entries in the Overreported Alert column indicate the Total Miles or Ton-Miles you reported for those carriers is greater than expected based on the activity reported by the carriers in their latest submission. This could be an error on your part, OR the carriers may not have reported all of their activity. Please make sure you selected the correct carrier fleet (some carriers report multiple fleets), and the activity level attributed to each carrier is accurate. If you believe your data is correct, simply check the '**My Data is Correct**' checkbox below and SmartWay will follow up with the carrier(s) regarding their reported activity levels.

Show 10 entries

Carrier Name	Mode - SmartWay Category	Available Activity Data	Ton-Miles	Total Miles	Average Payload	Payload Out of Range Alert	Overreported Alert	Corrections
A & H Cartage, Inc.	Truck - LTL/Dry Van	Ton-Miles & Avg Payload	123,456	6,172	20.00	Yellow		EDIT
A and S Transport Inc.	Truck - Flatbed	Ton-Miles & Avg Payload	3,456,789	164,609	21.00		Red	EDIT
A&M Transport, LLC: Dry Van Fleet	Truck - TL/Dry Van	Total Miles & Avg Payload	5,500,110	250,005	22.00	Yellow		EDIT

Showing 1 to 3 of 3 entries — Previous 1 Next

- **Payload Out of Range Alert(s):**

  Out of Range Explanation(s)

  This is an example to illustrate this feature

- **Overreported Alert(s):**

  ☑ My data is correct. Please contact the carrier(s) to address possible activity reporting errors on their part.*

- Overreported alerts address if you indicate you have moved more freight with a carrier than that carrier reported to SmartWay
- Either:
  - An error was made in carrier selection, or data entry
  - The carrier didn't report all their activity

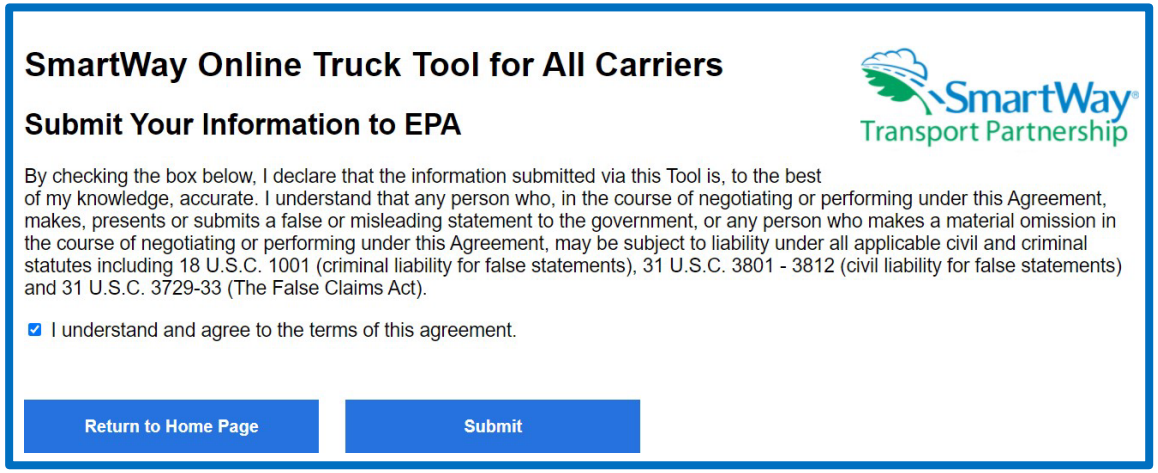
Review Your Information!

1. **Business Unit Report** - This report summarizes how you characterized your business unit(s), overall emissions performance, and % SmartWay results.
2. **Carrier Activity Report** - This report presents the data availability selection and activity levels specified for each carrier as well as their associated % SmartWay Values.
3. **Out of Range and Overreported Alerts Report** - This report summarizes 1) carrier payload values that fall outside of expected ranges and associated explanations, and 2) carrier-specific mile or ton-mile values that exceed the totals reported for that carrier.
4. **Emissions by Carrier Report –** This report shows the performance metrics (g/mile and g/ton-mile) by pollutant for each carrier, as well as total emissions (in tons), sorted by SmartWay Category and mode.
5. **Emissions by Mode Report** – This report shows the performance metrics (g/mile and g/ton-mile) as well as total emissions (in tons) by pollutant, aggregated by carrier mode.
6. **Business Unit Ton-Miles by Mode Report -** This report shows the percentage of ton-miles by mode for each logistics business unit used.
7. **Public Disclosure Report** - This report summarizes your emission results in a format common to other carbon reporting systems, such as the Greenhouse Gas Reporting System.

- Must view each report in order to proceed and submit
- You invested the time entering data, you should see the results
- Quality control review
- Hopefully shows insights into your freight emissions and optimization
- To print or save reports as a pdf: Right mouse click and select your option

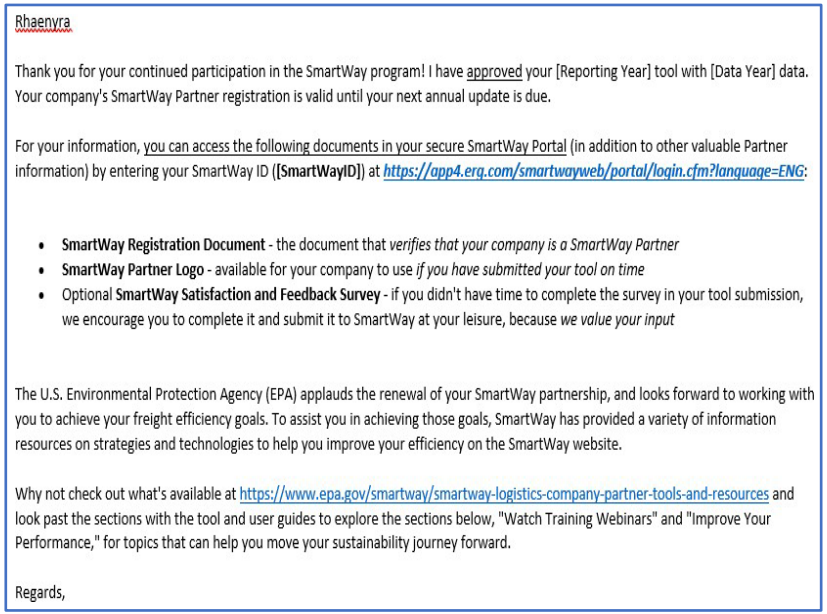
Submitting

- Submits your information electronically to SmartWay
- Make sure to click both the acknowledgement box and the Submit button
- You should get a confirmation email it was received (unless your security blocks it)
  - Make epa.gov and erg.com a “trusted source” in your email system
- Your PAM will review your Tool



Approval Submission Email

- After you submit your tool, your PAM will review it.
- Once approved, you will receive an email indicating you have been approved, or a welcome letter if you are a new partner.
- Your company will show up on the SmartWay Partner list at: https://www.epa.gov/smartway/smartway-partner-list
- Partners can now access these files in a 'partner only' portal at: https://app4.erg.com/smartwayweb/portal/Login.cfm



Rhaenyra

Thank you for your continued participation in the SmartWay program! I have approved your [Reporting Year] tool with [Data Year] data. Your company's SmartWay Partner registration is valid until your next annual update is due.

For your information, you can access the following documents in your secure SmartWay Portal (in addition to other valuable Partner information) by entering your SmartWay ID (**[SmartWayID]**) at *https://app4.erg.com/smartwayweb/portal/login.cfm?language=ENG*:

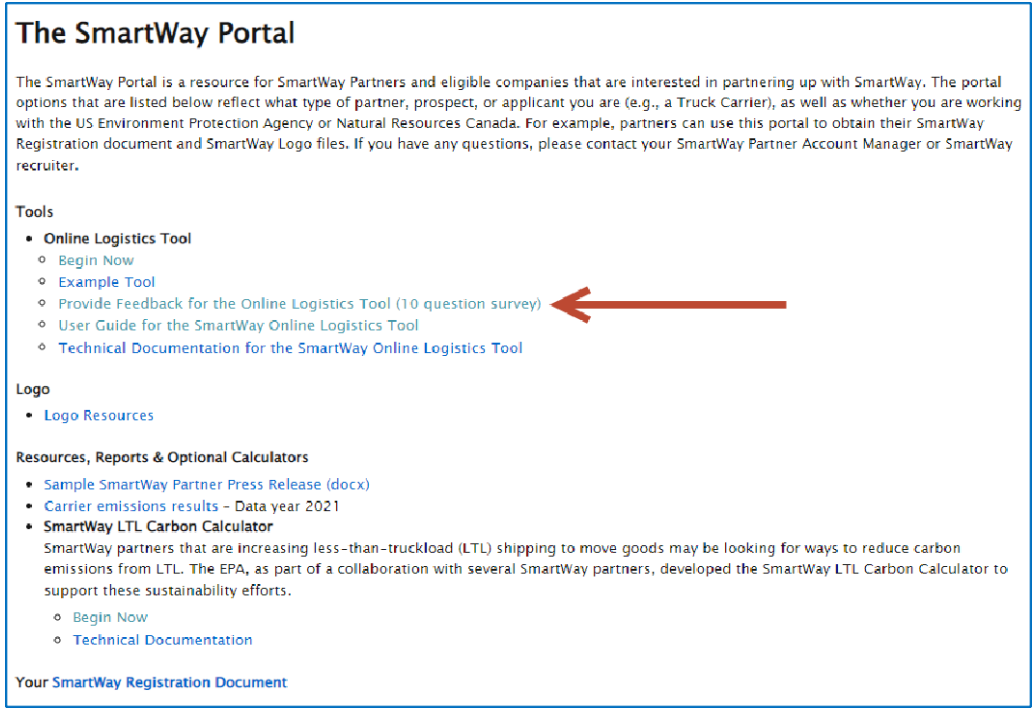
- **SmartWay Registration Document** - the document that *verifies that your company is a SmartWay Partner*
- **SmartWay Partner Logo** - available for your company to use *if you have submitted your tool on time*
- Optional **SmartWay Satisfaction and Feedback Survey** - if you didn't have time to complete the survey in your tool submission, we encourage you to complete it and submit it to SmartWay at your leisure, because *we value your input*

The U.S. Environmental Protection Agency (EPA) applauds the renewal of your SmartWay partnership, and looks forward to working with you to achieve your freight efficiency goals. To assist you in achieving those goals, SmartWay has provided a variety of information resources on strategies and technologies to help you improve your efficiency on the SmartWay website.

Why not check out what's available at https://www.epa.gov/smartway/smartway-logistics-company-partner-tools-and-resources and look past the sections with the tool and user guides to explore the sections below, "Watch Training Webinars" and "Improve Your Performance," for topics that can help you move your sustainability journey forward.

Regards,

Survey



The SmartWay Portal

The SmartWay Portal is a resource for SmartWay Partners and eligible companies that are interested in partnering up with SmartWay. The portal options that are listed below reflect what type of partner, prospect, or applicant you are (e.g., a Truck Carrier), as well as whether you are working with the US Environment Protection Agency or Natural Resources Canada. For example, partners can use this portal to obtain their SmartWay Registration document and SmartWay Logo files. If you have any questions, please contact your SmartWay Partner Account Manager or SmartWay recruiter.

Tools

- **Online Logistics Tool**
  - Begin Now
  - Example Tool
  - Provide Feedback for the Online Logistics Tool (10 question survey)
  - User Guide for the SmartWay Online Logistics Tool
  - Technical Documentation for the SmartWay Online Logistics Tool

Logo

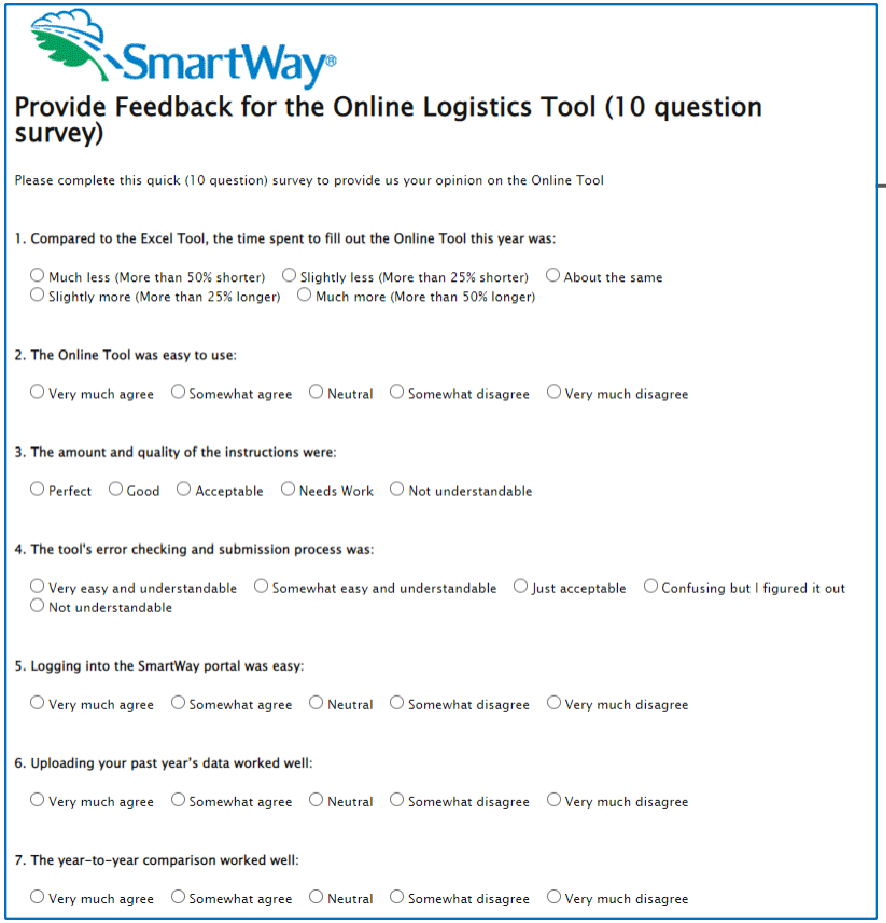
- Logo Resources

Resources, Reports & Optional Calculators

- Sample SmartWay Partner Press Release (docx)
- Carrier emissions results – Data year 2021
- **SmartWay LTL Carbon Calculator**
  SmartWay partners that are increasing less-than-truckload (LTL) shipping to move goods may be looking for ways to reduce carbon emissions from LTL. The EPA, as part of a collaboration with several SmartWay partners, developed the SmartWay LTL Carbon Calculator to support these sustainability efforts.
  - Begin Now
  - Technical Documentation

Your SmartWay Registration Document

- Please fill out the Survey in the Partner Portal



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Provide Feedback for the Online Logistics Tool (10 question survey)

Please complete this quick (10 question) survey to provide us your opinion on the Online Tool

1. Compared to the Excel Tool, the time spent to fill out the Online Tool this year was:

○ Much less (More than 50% shorter) ○ Slightly less (More than 25% shorter) ○ About the same
○ Slightly more (More than 25% longer) ○ Much more (More than 50% longer)

2. The Online Tool was easy to use:

○ Very much agree ○ Somewhat agree ○ Neutral ○ Somewhat disagree ○ Very much disagree

3. The amount and quality of the instructions were:

○ Perfect ○ Good ○ Acceptable ○ Needs Work ○ Not understandable

4. The tool's error checking and submission process was:

○ Very easy and understandable ○ Somewhat easy and understandable ○ Just acceptable ○ Confusing but I figured it out
○ Not understandable

5. Logging into the SmartWay portal was easy:

○ Very much agree ○ Somewhat agree ○ Neutral ○ Somewhat disagree ○ Very much disagree

6. Uploading your past year's data worked well:

○ Very much agree ○ Somewhat agree ○ Neutral ○ Somewhat disagree ○ Very much disagree

7. The year-to-year comparison worked well:

○ Very much agree ○ Somewhat agree ○ Neutral ○ Somewhat disagree ○ Very much disagree

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- 10 Question Survey
  - 9 “Checkbox” Questions
  - 1 Open Ended Question
- Please complete this as it is an important diagnostic tool for SmartWay
- Use Question 10 for any suggestions!

Registration Documents

- Available in the SmartWay Partner Portal
- SmartWay Registration Docs are for partners to display in their lobby, website, or advertisements.

Demonstration of the 2023 Logistics Tool

2023 SmartWay Tool Schedule

Questions?

SmartWay
U.S. Environmental Protection Agency

THANK YOU for being a SmartWay Partner!

SmartWay website: https://www.epa.gov/smartway

SmartWay Hotline: 734-214-4767

SmartWay email: smartway_transport@epa.gov