IIRS Procedures

The IAM Issue Resolution System

Welcome to the IAM Issue Resolution System (IIRS) course. This course's coverage includes learning how



to sign in/access and use the IIRS Dashboard.

Additional sections include how to file an issue and how to respond to an issue that has been filed against you.

Access to the IIRS is through the IAM Mobility Exchange or IAMX. The internet address for IAMX is:

www.iamovers.mobilityex.com

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Figure 1

You will need administrative rights to sign in to IAMX. (red arrow Fig 1) If you are unsure of whether you have user credentials or if you need to request administrative rights, click the link to <u>Register</u> at the top of the screen.

Once properly signed in, you will see a Welcome followed by your e-mail address at the top, right corner of the screen. (yellow arrow Fig 2)



Figure 2

Click the *Admin* menu option. You will find the *Issue Resolution Help* File that contains general information about the IIRS.

You will also see the option to access the *Issue Resolution Dashboard*. (yellow arrow Fig 3) The dashboard holds the list of trade issues that you have filed against other companies as well as any issues that have been filed against your company. This is also where you can start the process of filing a new issue (see following section).



How to File an Issue

The IIRS is the gateway for filing any issue, dispute, or request for IAM intervention. All unpaid debts must be registered and filed through this system to qualify for the <u>Receivable Protection Program</u> or RPP. The IAM staff categorizes all filed issues based on the nature of the issue and then directs it to the proper channel. This categorization determines the appropriate channel for the filed issue, with the RPP being one of the possible channels.

Let's click the option to File a New Issue

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	Issue Resolution Dashboard	
Welcome to the Issue Resolution Dashboard!		
Use this dashboard to file new Issues and manage your company	ny's Trade Issues. IAM defines a "Trade Issue" as any alleged disagreement or failure to abide b	accepted standards of conduct between two IAM Member companies.
Get Started		
If you want to submit a new Issue against another company, clic to review.	sk the blue "FILE A NEW ISSUE" button just below this text on the right side of the screen. This	vill open a new screen where you can enter the details of the issue for IA
Manage Your Company's Issues		
This dashboard shows the issues that have been filed BY or AGA	AINST your company. Use this interface to check in on these issues, upload documents reques	ed by IAM Staff, or respond to the latest development on an issue.
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Figure 4

Note the instructions for possible assistance that the IAM can provide based on the different membership types (blue arrow Fig 5):

Non-Member – The IAM can register and record the issue but cannot take any action. The report may affect the company's profile in IAMX and acceptance into IAM should they apply for membership. IAM can take action on non-members misrepresenting themselves as IAM members and using the IAM logo on their website or marketing materials.

IAM Member – The IAM can intervene on your behalf at the end of the Member Resolution Period. While IAM Members are all encouraged to accept IIRS guidelines and determinations, the IAM has more enforcement options when the complaint is against an <u>IAMTrusted Moving Company</u>.

IAMTrusted Moving Companies – The IAM has the most recourse against IAMTrusted companies due to their voluntary commitment to abide by a stronger set of expectations and requirements and to communicate and spread the importance of being a trusted mover.

Enter the name of the company in the search field (red arrow Fig 5). If you are not certain of the exact company name, type the most unique aspect of the company name. The system will look for matches and present a list which you can refine.

If you get a large number of possible matches, you may narrow down the list by entering the country, city or another part of the company name (red arrow Fig 5)

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Be sure that you have selected the exact company in the exact location that you wish to file the issue against. Note their membership type and remember the possible levels of assistance the IAM may be able to provide. Dealing with IAM Members especially IAMTrusted Moving Companies is your best assurance of prompt issue resolution. Be selective when choosing potential trading partners.

Having selected the right company, you can now provide the details of the issue. The first part of the screen showing your company as the *Filed By* party (red arrow Fig 6) and the *Filed Against* (blue arrow Fig 6) party are entered automatically with the fields presented on a gray background. Fields that are in gray are auto entered and not editable by you.

Let's click on Step 1 to start entering the issue details. Select what you think best describes the type of issue that you are filing from the *Issue Type* (green arrow Fig 6) drop down list. IAM will ultimately categorize the issue based on your submission details.

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Figure 6

You may file this issue confidentially. This means the filing is for IAM records only and it is not your intention to have the *Filed Against party* notified. Read carefully about your option to report this issue for record purposes only without notifying the Filed Against Party. While this will preserve your rights to Compensation eligibility through the RPP, the *Filed Against party* will not be notified and no action may be taken by the IAM. You can come back to this record and request notification later if necessary.

If you check the box for notification, the *Filed Against party* will be notified by e-mail once the IAM has reviewed and categorized your issue. (purple arrow Fig 6)

If you have classified your Issue Type as an Unpaid Debt, you will need to enter the Transaction Details (gold arrow Fig 6) in the fields provided. Remember that you will be able to upload supporting documents like invoices and correspondence in Step 3.

In the Issue Description comment field, you will need to provide a brief description of your issue.

Let's proceed to Step 2, Providing Contact Information.

By default, your information is entered as the contact for the *Filed By party* (red arrow Fig 7) because you are signed in to IAMX. You may change these details if you wish the main contact to be a different person.

Always press the Save button (blue arrow Fig 7) to ensure that the information you entered and the information you edited are saved to the record.

Next, enter the information for the main contact for the *Filed Against party*. (green arrow Fig 7)

	•										
9 IAM							Home	IAMX Resources	IAM Learning	IAMX Dashboard	Register!
	Heack 🛃 Save										
	1										
	Issue Details										
	To ensure speedy processing	ng of your is	sue, it is important for you to provide	e the ne	cessary details in the form be	low. Once	you have entere	d the requested det	ails below, please c	click <u>SAVE</u> at the top	left of the scr
	Issue ID Filed	By			Filed Ag	inst				Member Sta	tus
	5 Mr	obility Excha	inge, LLC, North Potomac, MD, Unite	d State	Intern	tional Ass	ociation Of Mov	ers, Alexandria, VA,	United States	IAM Mem	ber
	Issue Status*		Status Date								
	Pending Submission	n 👻	Feb 9, 2023								
	IAM Classification Date		Acknowledged (Target)		Acknowledged (Actual)		Resolution (Ta	roet)	Resolution (A	Actual)	
				1		*					1
					Acknowledged By				Resolved By		
									1000110009		
	1 0										
	Step 1: Issue Detail	15									
	✓ Step 2: Contact Infe	ormation									
	Your contact details	have been	identified based on your IAMX sign i	n crede	ntials. You may change there	tact deta	ils to identify th	e main contact. Any	communication rel	lated to this issue w	ill be directed
	Main Contact I	nformat	ion at the Company filing	g the	issue:						
					Email		Phone		Mobile Phone		
	First Name		Last Name								
	First Name RPP		Last Name Tester		jack@noemail.com		7033179950	I			
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Figure 7

In Step 3, upload your supporting documents. These documents will be visible to the IAM and the Filed Against party if you selected the option to notify the Filed Against party.

Click the Upload Document button and select the type of document you are uploading. Provide a brief description of the document. Click on the staple icon to select the document from your computer and click open.

Doc	ument Upload			b	
	Document Type *	Description*	Upload	- i	
	None Approved Quota Unpaid Invoice Airway Bill House Waybill/ N Ocean Bill of Lad Order for 3rd Pa Order for Storag Other Proof 3rd Party 5 Proof of Delivery Railway Bill Receipt Roadway Bill Written/ Typed In	tion for Service Manifest ling rty Service by debtor e Service completed / nventory	esolution (Target)	Cancel	nt Program

You may upload (green arrow Fig 8) as many relevant documents as you need to support your issue. You can save your document/s and return at another time to upload additional documents and comments (yellow arrow Fig 8) as required. Be sure to click the Save icon (red arrow Fig 8) to save your changes as you go.

When you have checked your work, click the Submit button (blue arrow Fig 8). This will send the alert to the IAM about this new issue submission.

> Step 1: Share Issue Details				
Step 2: Provide Contact Information				
Step 3: Upload Supporting Documents				
Please upload any documentation here that would support your Use the blue "Upload Document" below to provide IAM and the o origin services provided by the other company, please upload at matter between your two companies.	Issue Submission. Click the blue "Upload Do ther company with the documents that supp a minimum the service level agreement or q	cument" button to get started. ort your company's position on I uotation your company accepted	this issue. To provide an example, if j d for this service, the inventory, and a	you are reporting an issue on the ny correspondence concerning this
Show 10			Searc	h:
* ID 💠 Document Name	Document Type	+ Description	Uploaded Date	+ View Document
3 45001_2018 2022-2025 AMS 00037807-003.pdf	Unpaid Invoice	Invoice Sept 2022	Feb 3, 2023 17:16:54	
Showing 1 to 1 of 1 entries				Previous 1 Next
Save	≣ Submit Issue to			
xmment				Add Comment
re 8	7	AProfe	,	

Figure 8

What Happens Next?

The IAM will review your submission and assign its category based on the information you have provided.

If you have asked that the Filed Against Party not be notified, the IIRS will retain a record of the issue for reporting purposes only. This will acknowledge your timely reporting in case you decide at a future date that you need the IAM's intervention.

If you have asked for the Filed Against Party to be notified, an e-mail alert informing them that an issue has been filed against their company and a response is required from them, will go out to the company's listed administrative contacts in IAMX. All IAM Members are encouraged to file an acknowledgement of receipt of the issue within 10 working days. As soon as the IAM has categorized an issue for notification, two timeframes are initiated. First, IIRS' 30-day clock starts to tick for the two parties to try to resolve the issue between themselves. We believe that most issues will be resolved between the two IAM Members during this period. Second, the 10-day clock starts to tick for IAMTrusted Moving Companies to acknowledge the receipt of the issue or risk losing their ITMC status. The IAM encourages all members to acknowledge the issues submitted against their company.

The Comments Field box (yellow arrow Fig 8) is available to both parties to discuss the issue resolution. A running record of the comments is always available to both parties and the IAM.

The Issue Details View

After the Issue has been filed with IAM, it is important to understand the milestones that have been created to drive the issue resolution. Once IAM has reviewed the Issue submission, Target Dates will be created. The Acknowledged Target Date (green arrow Fig 9) establishes the deadline date for the Filed Against Party to Acknowledge the issue. The Resolution Target Date for the issue to be resolved between the two parties also gets set. (red arrow Fig 9)

Issue Details			
To ensure speedy processing of your issue, it is important i	for you to provide the necessary details in the form below	v. Once you have entered the requested details belo	w, please click <u>SAVE</u> at the top left of the screen.
Issue ID Filed By	Filed Agair	st	Member Status
7 IAMX Ads, Tuvalu, Tuvalu	Mobility	Exchange, LLC, North Potomac, MD, United States	IAM Member
Issue Status* Status Date			
Pending IAM Review Y Feb 3, 2023			
IAM Classification Date Acknowledged	(Target) Acknowledged (Actual)	Resolution (Target)	Resolution (Actual)
2023-Feb-06 🗮 2023-Feb-19	2023-Feb-09	2023-Mar-14	
	Acknowledged By		Resolved By
	Imo@mobilityex.com		
> Issue Details			
> Contact Information			
2 Supporting Documents			
E Convert to RPP			
Comments			

Figure 9

The Filed Against Party will acknowledge receipt of the issue by entering the Acknowledged Actual Date into the IIRS system. The system will automatically use the name of the party signed in and enter this name into the Acknowledged By field.

If the two parties are able to successfully resolve the issue between themselves, the Party Filing the Issue must enter the date in the Resolved By field to record that a resolution has been reached. The name of the person recording this date will automatically be entered into the Resolved By field.

All IAM Members are encouraged to work to resolve issues within the 30-working day period.

What Happens If Resolution Is Not Reached Within 30 Days?

If the two parties fail to reach a resolution within 30 days, the issue will automatically be routed to the IAM for review. The IAM Staff will then take over the resolution process, guided by the nature of the issue and the established resolution processes as set forth in the <u>RPP Operating Rules and Regulations</u> or the <u>IAM Procedures for Dispute Resolution and Ethics Enforcement</u>.

After a thorough review of the issue, the IAM will deliver the final determination on the issue settlement and communicate all necessary information to both parties.

All IAM Members are encouraged to accept the determinations made by the IAM as part of the IIRS. IAMTrusted Moving Company Members are required to accept these determinations and respond accordingly within the prescribed time period if they wish to maintain their IAMTrusted Moving Company status.

A Professional Developm

How To Respond To An Issue Filed Against Your Company

If an issue has been filed against your company in the IIRS, the contacts listed as Admins in your IAM member profile will receive an e-mail alert. The alert will contain a link that will take you to your IIRS dashboard. Note that If your contacts are not updated in IAMX, you may miss the alerts. Manage your contacts by logging in today or contacting membership@iamovers.org.

You can also access the IIRS dashboard by clicking the Admin menu at <u>IAM Mobility Exchange</u> and selecting the Issue Resolution Dashboard option. You must be signed in to IAM Mobility Exchange as a company admin to access the dashboard. For help with signing in, please refer to the Support menu option at IAMX.

SIAM		Q Search	🚔 IAMX Resources	L My Portal	E IAM Learning	II IAMX Dashboard	⊘ Register !	- 💄 Admin	Password	Welcome, r
			Issue Resol	ution Da	shboard					
	Welcome to the Issue Resolution Dashboard!									
	Use this dashboard to file new Issues and manage your company's Tracompanies.	ade Issues. IA	M defines a "Trade Issu	ie" as any allege	d disagreement or fa	ilure to abide by accept	ed standards of c	conduct betwee	en two IAM Mem	ber
	Get Started									
	If you want to submit a new Issue against another company, click the issue for IAM to review.	blue "FILE A N	EW ISSUE" button just	below this text o	n the right side of th	e screen. This will open	a new screen wh	iere you can er	nter the details of	the
	Manage Your Company's Issues									
	This dashboard shows the issues that have been filed BY or AGAINST issue.	your company	y. Use this interface to	check in on these	e issues, upload doci	uments requested by IA	M Staff, or respor	nd to the lates	t development or	n an
	For more information on this screen, read this overview: IAM Issue Re	esolution Syste	em							
	Trade Issues (filed by my company)								+ File a New I	Issue
	Show 10 🗸 entries						Sea	arch:		
	* Issue Id 🛛 🗧 Filed By		÷ Filed Aga	iinst			🗧 Issue S	Status		
			No data	a available in table	2					
	Showing 0 to 0 of 0 entries								Previous	Next
	Trade Issues (filed against my company)									
	Show 10 🗸 entries						Sea	arch:		
	* Issue Id 🛛 + Filed Against		🔶 Filed By				+ Issue Status	s	¢	
	7 Mobility Exchange, LLC, North Potomac, MD, United States		IAMX Ads, T	uvalu, Tuvalu			Pending Ackn	owledgement	🖍 Manage	
	Showing 1 to 1 of 1 entries								Previous 1	Next
	Contact Us Site Map Privacy Policy			() V	in @					
Figure 10										

The dashboard will have a listing of any issues you may have raised against other companies (red arrow Fig 10). You will also find a listing of any issues filed against your company (green arrow Fig 10). Click the Manage (blue arrow Fig 10) option to view the issue.

Your first step is to Acknowledge receipt of the issue. This simply asks you to acknowledges that you have received the issue and are reviewing it. Click the blue Acknowledge button (red arrow Fig 11) on the screen. This will automatically enter the current date (blue arrow Fig 11) and your e-mail address as the person acknowledging the issue (green arrow Fig 11).

Provide the Issue D	etails	AM with the requested information	so we can accor	s the Issue propert	,					
Use the below s	reen to enter the o	details on your issue. To get starte	d, please expand	the "SHARE ISSUE I	,. DETAILS" menu.	Please remember to	o provide contact inform	mation and uplo	ad supporting d	ocuments to
why you are sub	mitting this Issue t	o IAM. You can save the issue at a	ny point by clickin	g the blue "Save" b	utton at the top	or bottom of the sci will not take any act	reen. ion until issue has heer	n submitted		
Issue ID	Filed By	is, please click the blue (submit is	Sue to IAM Dutto	Filed Against	ine screen. IAW	will not take any act	ion unui issue nas beer	Member Status		
7	IAMX Ads, Tu	valu, Tuvalu		Mobility Ex	change, LLC, North	n Potomac, MD, United	States	IAM Member		
Issue Status		Status Date			_					
Pending A	cknowledge 🐱	Feb 1, 2023	Acknow	ledge						
IAM Classificat	ion Date	Date Acknowledge (target)	Date Acknow	vledge (actual) 🖌	Date Resol	ved (target)	Date Resolved (ad	ctual)		
Feb 1, 2023		Feb 11, 2023			Mar 3, 20)23				
			Acknowledg	ed By			Resolved By			
> Share Issu	e Details									
> Provide Co	ontact Informatio	'n								
> Upload Su	pporting Docume	ents								
🛓 Save				E Submit Is	sue to IAM					
Comments										

Figure 11

It is important for all IAM Members to promptly acknowledge issues raised against their company within 10 days of the issue filing. It is a requirement for IAMTrusted Moving Companies to do so as a condition for maintaining their ITMC status.

You now have access to the details of the issue including the uploaded documents and comments. We encourage you to immediately review the issue. Use the Comments field to record any responses, comments and proposals into the IIRS system. The comments will be available to the party that has filed the issue against your company and also to the IAM.

You may wish to communicate with the company who filed the issue by e-mail or phone to work out the issue. Ideally, this communication should lead to a resolution. If an agreement is reached, you may make a note of this in the Comments field.

The issue can only be closed or resolved when the party that has filed the issue agrees and records their agreement to the resolution in the system. This should ideally be completed prior to the 30-day self-resolution period.

Remember that if the issue cannot be resolved between the two parties within this 30-day period, it will automatically be routed to IAM for review.

Based on the nature of the issue, it may be referred to the IAM Staff for further review. The IAM has additional tools to support issue resolutions through the established resolution processes in the RPP Operating Rules and Regulations or the IAM Procedures for Dispute Resolution and Ethics Enforcement.

After review, the IAM will issue a determination to settle the issue and will advise the parties.

All IAM Members are encouraged to accept the determinations made by the IAM as part of the IIRS. IAMTrusted Members are required to accept these determinations and promptly take the actions requested as a condition for maintaining their IAMTrusted status.

A Professional Development Prof