Owner-operator onboarding checklist

One sheet per contractor, kept as the first page of their folder.

CONTRACTOR'S BUSINESS NAME	TRUCK (VIN OR UNIT)	CHECKED BY	FIRST JOB DATE

ITEM	DONE	DATE	NOTES
1. The contractor's business			
Company registration (formation papers from the state)	☐		
Federal tax ID and a completed W-9, same name as the papers	☐		
The person signing is an owner or officer of the business	☐		
Business address, phone, email, after-hours contact	☐		
2. The truck			
Proof the business owns or leases the truck (title or lease)	☐		
Current registration. Weight rating (GVWR) written in the notes	☐		
Annual inspection passed in the last 12 months §396.17	☐		
Truck readiness and equipment sheet completed (sheet 2)	☐		
Secure overnight parking confirmed	☐		
3. Insurance			Amounts: set them with your insurance broker
Certificate of insurance sent directly by the contractor's agent	☐		
Liability for when the truck is not working for you (non-trucking)	☐		
Physical damage cover on the truck	☐		
Workers' compensation or occupational accident cover (state rules)	☐		
Your company listed on the certificate the way your broker asks	☐		
Truck and every driver sent to your own insurer before the first job	☐		
4. The driver			One file for each person who will drive the truck
Driver file opened: application, license, medical card, road test §391.51	☐		
Driving record and previous employer check, within 30 days §391.23	☐		
CDL drivers: drug and alcohol testing and Clearinghouse steps done	☐		
5. The agreement and the first day			
Agreement from your lawyer, signed by both sides before the first job	☐		
Interstate authority: written lease, copy on the truck §376.11, §376.12	☐		
Your name and USDOT number, both sides ("operated by" if another name shows) §390.21T	☐		
Every expiry date above written on the tracker	☐		
First-week summary filled in and walked through (sheet 3)	☐		

Not in this file, on purpose: a contractor agreement and insurance amounts. The agreement comes from a lawyer in your state, the amounts from your insurance broker. Whether someone is a contractor is decided by law, not by this checklist.

Truck readiness and equipment sheet

Walk around the truck together before the first job. Write down what you see. Both sign.

DATE	CONTRACTOR	YEAR, MAKE, MODEL

VIN	PLATE AND STATE	MILEAGE	WEIGHT RATING (GVWR)

CONDITION	OK	FIX
Cab and glass		
Windshield, no cracks in the driver's view	☐	☐
Both mirrors	☐	☐
Wipers and washer fluid	☐	☐
Horn	☐	☐
Seat belts	☐	☐
Lights		
Headlights, high and low	☐	☐
Brake lights and tail lights	☐	☐
Turn signals and hazards	☐	☐
Marker and roof lights	☐	☐
Body		
Front and rear bumpers	☐	☐
Box: left side, right side, front, roof	☐	☐
Rear door opens, closes, and locks	☐	☐
Box floor dry and clean, tie-down rails solid	☐	☐
Ramp or lift gate works	☐	☐
Steps and grab handles	☐	☐
Wheels and brakes		
Tires: tread, pressure, no damage	☐	☐
Brakes and parking brake	☐	☐
No fluid leaks under the truck	☐	☐

ON THE TRUCK	YES	NOTES OR COUNT
Documents		
Registration	☐	
Insurance card	☐	
Annual inspection proof	☐	
Lease copy, if one applies	☐	
Blank customer paperwork sets	☐	
Safety and marking		
Fire extinguisher, charged	☐	
Three warning triangles	☐	
First aid kit	☐	
Logging device, if needed	☐	
Name and USDOT number, both sides	☐	
Moving equipment		
Hand trucks	☐	
Four-wheel dollies	☐	
Moving blankets	☐	
Straps	☐	
Floor runners	☐	
Toolbox with power tools	☐	
Packing materials	☐	
Piano board, if needed	☐	
Step ladder and broom	☐	

EXISTING DAMAGE AND ANYTHING TO FIX BEFORE THE FIRST JOB (TAKE PHOTOS, NOTE WHERE THEY ARE SAVED)

Federal rules ask for a fire extinguisher and warning devices on every truck (49 CFR 393.95) and an inspection of the whole truck at least once every 12 months (49 CFR 396.17). The rest of this sheet is a working standard. Change it to fit the jobs you offer.

CONTRACTOR SIGNATURE	COMPANY REPRESENTATIVE	DATE

How we work together

Sheet 3 of 3

The contractor's first week on one page. Fill it in, walk through it together, hand over a copy.

COMPANY	CONTRACTOR	WALKED THROUGH ON

What the company provides

- Job offers in writing: date, window, addresses, crew size sold, promises made.
- The customer paperwork set for every job.
- Changes to a job as soon as the office knows.
- One dispatch contact and an after-hours number.
- Customer contact around the job: reminder, mid-move call, review request.
- A written settlement statement, on the agreed schedule.

What the contractor provides

- A truck that passes inspection, with the equipment for the job.
- The crew size the job was sold with.
- Insurance kept in force, new certificate before expiry.
- Current documents for every driver.
- A call to the customer when the truck is on the way.
- Signed customer paperwork, complete.
- Reports to dispatch: arrived, late, finished, any damage.
- The days they want work, as agreed below.

1 How a job reaches you

1. Dispatch sends the offer in writing. You accept or decline it by the time agreed.
2. For an accepted job, the details and paperwork arrive before move day.
3. If the job is not what was sold, tell dispatch before the work starts. The office talks to the customer about price.
4. How the crew does the work is yours to decide. The date, the window, and the promises are fixed.

2 Deadlines

WHAT	DUE (WRITE IT IN)	SEND TO
Answer to a job offer		
Days the contractor wants work		
Signed customer paperwork (photo first, then originals) *		
Payments collected from the customer		
Damage or incident report, with photos		
New insurance certificate, license, or medical card		

* Under a federal lease, the carrier may not set time limits for required delivery documents (49 CFR 376.12(f)). Ask your lawyer.

3 Who to call

FOR	NAME	PHONE OR EMAIL
Job details, schedule, running late		
A customer complaint, damage, or a claim		
Truck, driver documents, insurance		
Settlement statements		
After hours and emergencies		

This page is a summary, not the agreement. If the two ever differ, the signed agreement is what counts. Reviews: the office asks every customer the same way, the day after the move.