

Heavy Equipment Rental Checklist

Protect the machine and the deal, from handoff to return

Run this list every time a machine goes out. It pairs with the Heavy Equipment Rental Agreement and covers the points a one-page form misses. Full guide:

BEFORE HANDOFF

- ☐ Record the make, model, and serial or unit number on the agreement
- ☐ Photograph the machine from several angles, timestamped, and note any existing damage
- ☐ Photograph the hour meter straight-on so the pickup reading is legible
- ☐ Set the included hours and the overage rate in writing
- ☐ Collect the certificate of insurance (COI) and check that the dates cover the whole term
- ☐ Name who hauls the machine and who owns damage in transit
- ☐ Collect the security deposit and write down the amount
- ☐ Confirm whether the rental is bare or comes with an operator
- ☐ Have both parties sign and date the agreement

DURING THE RENTAL

- ☐ Remind the renter of the permitted use, the job site, and the no-subletting rule
- ☐ Confirm daily fluid and safety checks are part of the deal
- ☐ Put any change to the dates, hours, or terms in writing

AT RETURN

- ☐ Record the closing hour-meter reading and compare it to the included hours
- ☐ Check the fuel level against the pickup level
- ☐ Walk through the machine against the pickup photos
- ☐ Settle any damage or overage in writing, then return the deposit
- ☐ Keep the signed agreement, the photos, and the payment record (Schedule C, line 20a)

INSTRUCTIONS FOR USE

This checklist is general information, not legal advice. Equipment rentals fall under your state's version of Uniform Commercial Code Article 2A, and operator and hauling duties may fall under OSHA and federal motor-carrier rules, so confirm yours before you rely on this. The full guide and official sources are at clearlegaltips.com/heavy-equipment-rental-agreement-template/