



## Ready or Not? Get Ready with A Tractor Operator Checklist<sup>1</sup>

Carol J. Lehtola and Charles M. Brown<sup>2</sup>

This checklist is designed so that it can be kept as a record of a tractor operator's training.

Safe, competent tractor operators are important to Florida agriculture. Incidents causing injury and death and/or damaging tractors, equipment or crops are costly.

# Safety *is the Bottom Line*

Many tractor incidents can be prevented by putting safer drivers on safer tractors in a safer environment. This should be the goal of owners, managers, supervisors, and tractor operators.

The tractor operator checklist is provided for this purpose. Its recommended uses are to:

- Evaluate the competence of new or potential tractor operators.

- Conduct the annual retraining or evaluation of tractor operators.
- Train a tractor operator assigned to a new or different tractor.

The checklist can be used as is, or it may be modified to meet specific needs. If a service mechanic is responsible for some of the maintenance functions, you might not need them on a checklist for your tractor operators.

Completion of this checklist when tractor operators are first assigned to a tractor and annually thereafter is evidence that employees have been instructed in the safe use of the tractor.

### OSHA Requirements

The following is a requirement for all agribusinesses that fall under the jurisdiction of the Occupational Safety and Health Act (OSHA).

- All tractor operators shall be informed of certain safe operating procedures when first assigned to operate a tractor and at least annually thereafter. These nine points are:

1. This document is ABE307 (formerly AE307), one of a series of the Agricultural and Biological Engineering Department, Florida Cooperative Extension Service, Institute of Food and Agricultural Sciences, University of Florida. First published September 2001. Reviewed November 2009. Please visit the EDIS Web site at <http://edis.ifas.ufl.edu>.
2. Carol J. Lehtola, associate professor and Extension Agricultural Safety Specialist; and Charles M. Brown, Coordinator for Information/Publication Services, Department of Agricultural and Biological Engineering, Institute of Food and Agricultural Sciences, University of Florida, Gainesville, 32611.

1. Securely fasten your seat belt if the tractor has a ROPS.
2. Where possible, avoid operating the tractor near ditches, embankments, and holes.
3. Reduce speed when turning, crossing slopes, and on rough, slick or muddy surfaces.
4. Stay off slopes too steep for safe operation. If necessary, back up a slope and drive forward going downhill,
5. Watch where you are going, especially at the end of rows, on roads, and around trees.
6. Do not permit others to ride.
7. Operate the tractor smoothly — no jerky turns, starts, or stops.
8. Hitch only to the drawbar and hitch points recommended by the truck's manufacturer.
9. When the tractor is stopped, set brakes securely, and use park lock, if available.

Safer tractor operator training can be provided by a variety of methods, including in small groups or through individual instruction. One effective method is to have a competent supervisor instruct tractor operators on the important safety practices or procedures using a checklist.

## For More Information

For more information about tractor safety, visit the Florida AgSafe Web site:

<http://www.flagsafe.ufl.edu>; or the National Agricultural Safety Database (NASD): [www.cdc.gov/nasd](http://www.cdc.gov/nasd).

This publication is part of the Safer Tractor Operator series. A complete list of publications in this series is given below. All are available at your county Extension office and at the EDIS Web site, <http://edis.ifas.ufl.edu>, and at the Florida AgSafe Web site.

- Getting Started on the Right Foot: Dangers of Bypass Starting <<http://edis.ifas.ufl.edu/AE172>>

- When Two's a Crowd: Dangers of Extra Riders on Tractors <<http://edis.ifas.ufl.edu/AE173>>
- Filling Gas Cans Safely <<http://edis.ifas.ufl.edu/AE174>>
- Lighting and Marking Farm Equipment for Road Travel -- Summary of ASAE Standard S279.10 <<http://edis.ifas.ufl.edu/AE175>>
- Road Safety for Tractors and Farm Machinery <<http://edis.ifas.ufl.edu/AE176>>
- Frequently Asked Questions (FAQs) about Rollover Protective Structures (ROPS) <<http://edis.ifas.ufl.edu/AE177>>
- Avoid The Invisible Hazard: Know About Soil Shear Lines <<http://edis.ifas.ufl.edu/AE178>>
- Shortcuts are Shortsighted! or Invest Seconds, Save Lives (AE306) <<http://edis.ifas.ufl.edu/AE179>>
- Ready or Not? Get Ready with a Tractor Operator Checklist <<http://edis.ifas.ufl.edu/AE180>>
- Yee-Haa! Formula for a Successful Tractor Rodeo <<http://edis.ifas.ufl.edu/AE181>>
- Hand-me-down Hazards: Dangers of Used Equipment <<http://edis.ifas.ufl.edu/AE182>>
- Safety Tips for Tractor Loading and Towing <<http://edis.ifas.ufl.edu/AE183>>
- Safer Tractor Operations for Agricultural Employers <<http://edis.ifas.ufl.edu/AE195>>
- Safer Tractor Operations for Privately Owned and Operated Farms and Ranches <<http://edis.ifas.ufl.edu/AE196>>
- Safer Tractor Operations for Acreages and Homeowners <<http://edis.ifas.ufl.edu/AE197>>
- Safer Tractor Operations for Landscape Maintenance and Horticultural Industries <<http://edis.ifas.ufl.edu/AE198>>
- Safer Tractor Operations for Emergency and Rescue Personnel <<http://edis.ifas.ufl.edu/AE199>>

- Safer Tractor Operations for Farm Workers and Employees <<http://edis.ifas.ufl.edu/AE200>>

**Tractor Operator Checklist**

Directions: This checklist is designed to evaluate a tractor operator's abilities to safely maintain and operate a tractor. Mark (x) in the Yes column if the operator can perform the activity, or in the No column if the operator can not perform the activity. Mark the Not Applicable, NA, column if the activity is not appropriate for this tractor or operation.

Make of Tractor \_\_\_\_\_ Model \_\_\_\_\_

<b>Activity or Condition</b>	<b>Yes</b>	<b>No</b>	<b>NA</b>
Personal Safety Precaution			
Only operate the tractor if you are physically and mentally alert.			
Wear close-fitting clothes and proper shoes.			
Eat and drink in moderation, and do not operate the tractor if you have been drinking alcohol or taking drugs or medication.			
Use basic hand signals.			
Preparing the Tractor and Equipment for Safer Operation			
Don't operate the tractor in closed buildings.			
Check the location and condition of the fire extinguisher.			
Check the location and condition of the first aid kit.			
Read and understand decals on the tractor.			
Make sure that the shield for the PTO and other parts are in place.			
Keep steps and platform free of dirt, grease, and debris.			
Check if the slow-moving vehicle emblem is in place, clean, and not faded.			
Test lights to be sure they're working.			
Check for loose tools and parts.			
Clean the windows.			
Read and understand all controls.			
Check the condition and pressure of all tires.			
Check oil level; add oil as needed.			
Check coolant level; add coolant as needed. Do not remove radiator cap when hot.			
Check the battery's electrolyte level and add battery water as needed. Don't use matches around the battery and don't smoke.			
Check, clean, coat and tighten battery connections.			
Locate all grease fittings and clean and lubricate them.			
Refuel the tractor, making sure that the engine is cool and refrain from smoking.			
Adjust wheel width.			
Add or remove weights.			
Check if equipment has been properly serviced and adjusted.			
Starting, Operating, Stopping Tractor and Equipment			
Make sure that the area is clear of people, pets and obstacles.			
Adjust seat for comfort.			
Start the tractor.			
Check gauges for proper readings.			
Listen for unusual sounds and shut off the engine if you hear any.			
Check brakes.			
Warm engine before applying a heavy load.			
Never operate the tractor from the ground.			
Raise, lower and extend the drawbar.			
Clean and oil PTO shaft and splines.			
Clean, connect and disconnect hydraulic lines.			
Connect and disconnect electrical connections.			

**Ready or Not? Get Ready with A Tractor Operator Checklist**

Check hydraulic controls for proper operation.			
Engage PTO slowly; check for proper operation.			
Operate equipment at proper forward speed.			
Operate equipment at proper PTO speed.			
Watch and listen to equipment; shut off power at the first sign of a malfunction.			
Do not unclog, adjust, or service equipment while it is running.			
Observe all traffic rules when traveling on the road.			
Lock brakes together for high-speed travel.			
Shift gears properly.			
Watch for obstructions in the field.			
Back slowly, and watch behind.			
When stuck, back out or have the tractor towed.			
Leave the tractor in a low gear going down hills.			
Cool engine, then shut it off.			

On the following lines, add specific checklist items important for your workplace.


**Tractor Operator Instructions**

1. Securely fasten your seat belt if the tractor has a ROPS.
2. Where possible, avoid operating the tractor near ditches, embankments, and holes.
3. Reduce speed when turning, crossing slopes, and on rough, slick or muddy surfaces.
4. Stay off slopes too steep for safe operation. If necessary, back up a slope and drive forward going downhill.
5. Watch where you are going, especially at the end of rows, on roads, and around trees.
6. Do not permit extra riders.
7. Operate the tractor smoothly — no jerky turns, starts, or stops.
8. Hitch only to the drawbar and hitch points recommended by the truck's manufacturer.
9. When the tractor is stopped, set brakes securely, and use park lock if available.

**Tractor Machinery Certification Record**

(Employee's Name)

is certified to operate the following tractors or equipment:

---



---



---

Date \_\_\_\_\_

Supervisor \_\_\_\_\_