



# Transporting Passenger Pre-Planning Safety Observation Tool

Employee(s) Observed: \_\_\_\_\_ / \_\_\_\_\_ Date: \_\_\_\_\_ Completed By: \_\_\_\_\_

Task/Exposure	NA	Yes	No	Corrective Action Suggestions
Was the trip pre-planned, reviewed, and approved by the appropriate manager/supervisor?				
Did the employee(s) clearly explain the trip plan (where they were going, how they were going to do it, how the resident/client could assist, etc.) to the resident/client?				
Has the vehicle been properly serviced according to the manufactures specifications? (e.g. oil changes, tire pressure, fluid levels, etc.)				
Was a pre-operational walk-around completed before loading patients/clients? Including a review of wheel-chair lifts, tie-downs, seat belts, etc.				
Did the employee ensure that sufficient clearance was available around the vehicle to allow for the doors to open fully and have sufficient clearance for loading passengers?				
Was the trip supported by a sufficient number of staff?				
Were passengers placed in the rear of the vehicle away from distraction and contact with the driver?				
Was a plan in place to address N3L3 moments (stop work) should the situation change?				
Were durable medical goods available and inspected for condition before the trip?				
With transfers involving a wheelchair, were the wheels locked before moving the vehicle?				
Has ergonomic training and evaluation been conducted with staff to ensure proper body mechanics?				
Was the employee(s) observed rushing at any point during the process?				
Has the route and destination been pre-planned for to ensure safety for passengers/employees?				
Has driver training and evaluations been conducted with staff? (E.g. defensive driver training, intentional driving, ride-along evaluations, motor vehicle record checks, etc.)				