WHS DOCUMENTS & TEMPLATES

DOC-CHR-TPL · Client Home Risk Assessment (Pre-Visit Checklist)

Product Overview

For: NDIS, disability, aged care, home care and community services providers whose workers visit clients at home

Version 1.0 · 21 November 2026

Know the home before your workers walk in: an initial home safety assessment agreed with the client, a quick checklist for every visit, and a clear list of when to look again.

The Client Home Safety Assessment works through the home area by area: getting there and parking, animals, the people in the home and any history of aggression, smoking, fire and home oxygen, infection and sharps, trip hazards and lighting, electrical items, heat and cold, manual tasks and equipment, and mobile coverage. It records the client's own wishes, the controls agreed with them and a clear decision about how visits go ahead.

The Pre-Visit Checklist is one page for every visit: before you go, look before you go in, and after the visit. The Home Risk Review Triggers and Record lists when the assessment must be reviewed and records each review. All three are in Word, with PDF copies.

It assesses the home. Use it with your lone worker or check-in procedure, which covers keeping in contact with workers and what happens when a worker does not check in.

Written to work in any country, with Australian law as the worked example. The guide says what to check where you work. In Australia, its state and territory notes show where the law differs, including the regulator to contact. Made by Orana Skills Centre.

What is included

Item	File
Client home safety assessment: access, animals, people, smoking and fire, infection, inside the home, manual tasks and equipment, controls agreed and a decision	02_TEMPLATE/Client Home Safety Assessment.docx and .pdf
Pre-visit checklist: before you go, on arrival, during and after every visit	02_TEMPLATE/Pre-Visit Checklist.docx and .pdf
Review triggers and review record: when to review the home assessment, and each review	02_TEMPLATE/Home Risk Review Triggers and Record.docx and .pdf
How to Use This Template: how to complete and adapt it, the law in brief with Australia as the worked example, records and every placeholder	01_START_HERE/How to Use This Template.pdf
Read Me First, Product Overview, Permitted Use Terms and Version Information	01_START_HERE/ (PDF)

© 2026 Orana Skills Centre. All rights reserved.

SAMPLE · Client Home Risk Assessment (Pre-Visit Checklist) · Buy the full editable version:
training.oranaskillscentre.com/documents/client-home-risk-assessment-pre-visit-checklist

How to Use This Template

How to complete, adapt and keep the client home risk assessment (pre-visit checklist)

1 What this template is for

A client's home is a workplace the business does not control. Workers can meet dogs, other people, aggression, smoke, sharps, clutter, poor lighting and heavy tasks, often alone. This template finds those risks before the first visit, agrees the controls with the client, checks the home at every visit, and makes sure the assessment is looked at again when things change.

It assesses the home. Keeping in contact with workers who are alone, and what happens when a worker does not check in, belong in your lone worker or check-in procedure.

2 How to use it

Step	What to do
1	Name the coordinator for each client, and fill in the placeholders.
2	Before the first visit, complete the Client Home Safety Assessment, from the referral and a phone call with the client.
3	Where the risks are not known, make the first visit with two workers, or a senior worker, and finish the assessment then.
4	Agree the controls and visit conditions with the client, and decide how visits will go ahead.
5	Put the result where every visiting worker reads it before each visit, and train workers in the Pre-Visit Checklist.
6	Use the Pre-Visit Checklist on every visit, and act on what workers report.
7	Review the assessment at every trigger, and record each review.

3 Who does what

Who	What they do
Coordinator or team leader	Completes and reviews the assessment, agrees controls with the client, and tells workers
Workers who visit	Read the assessment, use the checklist, leave when unsafe, and report changes
Client or representative	Shares what they know about the home, and agrees the controls and visit conditions
Manager	Provides the resources for the controls, and decides when a service must be provided another way

4 The law, in brief

Health and safety laws differ by country and, in some countries, by state or province. Check the law, regulator and codes or guidance that apply where you work. Some industries, such as mining, have extra laws. Section 5 shows how the law works in Australia, as the worked example. Elsewhere, start with your health and safety regulator's website.

5 The law in Australia (the worked example)

The WHS laws apply wherever workers work, including in clients' homes. The business must identify the hazards, eliminate or minimise the risks so far as is reasonably practicable, consult its workers, and give them information,

© 2026 Orana Skills Centre. All rights reserved.

SAMPLE · Client Home Risk Assessment (Pre-Visit Checklist) · Buy the full editable version:
training.oranaskillscentre.com/documents/client-home-risk-assessment-pre-visit-checklist

YOUR LOGO
Right-click > Change Picture

[Company name]

WHS DOCUMENTS & TEMPLATES · DOC-CHR-TPL

Client Home Safety Assessment

Assess a client's home before the first visit, agree the controls with the client, and review it when things change

Client (name or reference)		**Address**	
Assessed by (name and role)		**Date**	
How assessed (phone call, referral, visit by two workers)		**Next review due**	

How to use it

- Complete it before the first visit: from the referral, a phone call with the client, and a first visit by two workers or a senior worker where the risk is not known. Mark Unknown where you do not know.
- Any Yes or Unknown that matters needs a control, written in part 9 and agreed with the client where it involves their home or household.
- Keep the result where every worker who visits can read it before each visit, and keep it confidential. Use the Pre-Visit Checklist on every visit.

1 Getting there and getting in

Question	Answer	Details, and the control needed
Is the home easy to find, with the number visible?	☐ Yes ☐ No ☐ Unknown	
Is there safe parking close by, where a worker can leave quickly?	☐ Yes ☐ No ☐ Unknown	
Are the path, steps, ramp and gate in safe condition, and lit after dark?	☐ Yes ☐ No ☐ Unknown	
Is there mobile phone coverage at the home? If not, where is the nearest coverage?	☐ Yes ☐ No ☐ Unknown	
Is the home remote, or far from emergency help?	☐ Yes ☐ No ☐ Unknown	

2 Animals

Question	Answer	Details, and the control needed
Are there dogs or other animals at the home?	☐ Yes ☐ No ☐ Unknown	
Will the client secure them, away from the worker, before every visit?	☐ Yes ☐ No ☐ Unknown	
Has any animal bitten, scratched or threatened anyone?	☐ Yes ☐ No ☐ Unknown	

© 2026 Orana Skills Centre. All rights reserved.

SAMPLE · Client Home Risk Assessment (Pre-Visit Checklist) · Buy the full editable version:
training.oranaskillscentre.com/documents/client-home-risk-assessment-pre-visit-checklist

WHS DOCUMENTS & TEMPLATES · DOC-CHR-TPL

Client Home Risk Assessment (Pre-Visit Checklist)

END OF THE FREE SAMPLE

This sample shows a few pages, so you can judge the layout and the quality. Know the home before your workers walk in: an initial home safety assessment agreed with the client, a quick checklist for every visit, and a clear list of when to look again.

What the full product contains

- **Client home safety assessment: access, animals, people, smoking and fire, infection, inside the home, manual tasks and equipment, controls agreed and a decision**
  02_TEMPLATE/Client Home Safety Assessment.docx and .pdf
- **Pre-visit checklist: before you go, on arrival, during and after every visit**
  02_TEMPLATE/Pre-Visit Checklist.docx and .pdf
- **Review triggers and review record: when to review the home assessment, and each review**
  02_TEMPLATE/Home Risk Review Triggers and Record.docx and .pdf
- **How to Use This Template: how to complete and adapt it, the law in brief with Australia as the worked example, records and every placeholder**
  01_START_HERE/How to Use This Template.pdf
- **Read Me First, Product Overview, Permitted Use Terms and Version Information**
  01_START_HERE/ (PDF)

Formats

- Word (.docx), editable, with your logo and business name in the header
- PDF copies of the Word documents, for printing blank
- Delivered as a single ZIP download

Get the full editable documents

https://training.oranaskillscentre.com/documents/client-home-risk-assessment-pre-visit-checklist

Instant download after purchase. · Orana Skills Centre · 1800 231 173 · bookings@oranaskillscentre.com

© 2026 Orana Skills Centre. All rights reserved. · v1.0