WHS DOCUMENTS & TEMPLATES

DOC-TRC-TPL · Transporting Clients Procedure

Product Overview

For: NDIS, disability, aged care and community services providers whose workers drive clients

Version 1.0 · 21 November 2026

Drive clients safely: suitable vehicles, fit and licensed drivers, a transport plan for each client, wheelchairs and seatbelts done properly, and clear steps when something goes wrong, with a pre-trip checklist and a trip log.

The procedure covers whether the trip is needed, vehicle suitability and maintenance, workers' own vehicles, driver licence checks, fitness to drive, fatigue and phones, each client's transport plan (behaviour, mobility, medical needs, seating and children), getting in and out, wheelchair travel and occupant restraint, medication and personal items, distress on the road, breakdowns, crashes and medical emergencies, and reporting.

The Pre-Trip Checklist checks the vehicle, the driver and the client before every trip. The Trip Log records each trip and anything that happened. All three are in Word, with PDF copies.

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
Procedure: vehicles, drivers, the client's transport plan, wheelchairs and restraints, medication, incidents and reporting	02_TEMPLATE/Transporting Clients Procedure.docx and .pdf
Pre-trip checklist: the vehicle, the driver and the client, before every trip	02_TEMPLATE/Pre-Trip Checklist.docx and .pdf
Trip log: every trip, the pre-trip check and anything that happened	02_TEMPLATE/Trip Log.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)

Who it is for

- Disability support, day programs and community access services
- Aged care, home care and social support services
- Coordinators, drivers and support workers

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SAMPLE · Transporting Clients Procedure · Buy the full editable version:
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How to Use This Template

How to complete, adapt and keep the transporting clients procedure

1 What this template is for

Driving clients combines the risks of the road with the needs of the people you support: behaviour that can distract a driver, medical events, transfers and wheelchairs. This procedure sets the rules for vehicles and drivers, puts a transport plan in place for each client, and makes every trip start with a check.

2 How to use it

Step	What to do
1	Fill in the placeholders, including the licence check frequency, the driving hours limit and the roadside assistance number.
2	List your vehicles and their equipment, and set up servicing and equipment inspections.
3	Check every driver's licence, and train drivers in the vehicles' equipment and in this procedure.
4	Write a transport plan with each client you transport, and have every driver read it before the first trip.
5	Use the Pre-Trip Checklist before every trip and the Trip Log for every trip.
6	Report and review every incident, near miss and fault, and review the procedure every year.

3 Who does what

Who	What they do
Manager	Approves vehicles and private vehicle use, and sets the limits
Coordinator or team leader	Writes the transport plans and plans trips
Drivers	Check, drive and report as the procedure says

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 treat a vehicle used for work as a workplace. The business must manage the risks of driving for work so far as is reasonably practicable, including fatigue, distraction, vehicle condition and the people being carried, and must consult its workers. Road rules, including those on mobile phones, seatbelts and child restraints, apply to every driver.

Restrictive practices, which can include devices that stop a person leaving a vehicle, are regulated in Australia for NDIS providers and in aged care. Incidents on a trip may need to be reported under the rules for your services.

In Australia, the template follows the model WHS laws that the Commonwealth, New South Wales, Queensland, Western Australia, South Australia, Tasmania, the ACT and the Northern Territory have adopted, each with its own variations, and it also works with Victoria's own Occupational Health and Safety (OHS) laws.

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Transporting Clients Procedure

Driving clients safely: vehicles, drivers, the client's transport plan, wheelchairs and restraints, and what to do when something goes wrong

1 Purpose and scope

Driving is one of the most dangerous things our workers do, and a client's distress, a medical event or a poorly secured wheelchair can turn a routine trip into a serious incident. This procedure sets out how **[Company name]** keeps clients, workers and other road users safe. It applies to every worker who drives or travels with clients, in our vehicles, hired vehicles or their own.

2 Is the trip needed, and how?

- Before a client is driven, ask whether the trip is needed and whether there is a safer way: public or community transport with support, a taxi or accessible transport with a worker as a passenger, or a service that comes to the client
- Where the client's transport plan says two workers are needed, the trip does not go ahead with one
- Trips are planned with enough time for the client's needs, breaks and traffic. Nobody rushes between appointments

3 Vehicles

- Vehicles are registered, roadworthy, serviced on schedule and insured for the way we use them, and suitable for the client and the trip
- Hoists, ramps and wheelchair tie-down and occupant restraint systems are inspected and serviced as the manufacturer says, and checked before each use
- Each vehicle carries a first aid kit, a phone charger, drinking water and the emergency contact list
- A worker's own vehicle is used only with approval, after its registration, insurance and condition are checked, and never for a client who needs a modified vehicle
- A vehicle with a fault that affects safety is not used until it is fixed. Faults are reported the same day

4 Drivers

- Drivers hold a current licence for the vehicle, checked when they start and at least every **[Licence check frequency]**. They tell us straight away if they lose it or it is restricted
- Drivers are fit to drive: rested, well, and not affected by alcohol, drugs or medication. A driver who is not fit says so, and is not penalised
- Drivers are trained in the vehicle's equipment before they use it with a client
- Fatigue: plan breaks on long trips, and keep within **[Driving hours limit]** of driving in a shift. Do not drive after a night shift without a rest
- Phones: never use a hand-held phone while driving. Pull over safely to call, text or check in. Set navigation before you leave
- Drive to the conditions, obey the road rules, and expect that a client may need you to stop

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Transporting Clients Procedure

END OF THE FREE SAMPLE

This sample shows a few pages, so you can judge the layout and the quality. Drive clients safely: suitable vehicles, fit and licensed drivers, a transport plan for each client, wheelchairs and seatbelts done properly, and clear steps when something goes wrong, with a pre-trip checklist and a trip log.

What the full product contains

- **Procedure: vehicles, drivers, the client's transport plan, wheelchairs and restraints, medication, incidents and reporting**
  02_TEMPLATE/Transporting Clients Procedure.docx and .pdf
- **Pre-trip checklist: the vehicle, the driver and the client, before every trip**
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- **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/transporting-clients-procedure

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