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Code of practice for wheelchair passport schemes

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Foreword

Publishing information

This British Standard is published by BSI Standards Limited, under licence from The British Standards Institution, and came into effect on 31 July 2013. It was prepared by Technical Committee CH/173/1, *Wheelchairs*. A list of organizations represented on this committee can be obtained on request to its secretary.

Relationship with other publications

This British Standard is a conversion of PAS 900, which is withdrawn.

Information about this document

This British Standard is intended for transport operations where risk assessment of individual passenger needs has taken place as part of an overall risk management process. It is intended to be used in harmony with other risk assessment processes that might already be in place.

The term "passport" has been adopted, and it has been noted that the term has connotations of cross-boundary freedom of movement. Whilst the intention of this standard is to provide guidelines for passport schemes operated on a local basis, extensive adoption of the scheme across the UK will facilitate easier and safer travel.

Use of this document

As a code of practice, this British Standard takes the form of guidance and recommendations. It should not be quoted as if it were a specification and particular care should be taken to ensure that claims of compliance are not misleading.

Any user claiming compliance with this British Standard is expected to be able to justify any course of action that deviates from its recommendations.

It has been assumed in the preparation of this British Standard that the execution of its provisions will be entrusted to appropriately qualified and experienced people, for whose use it has been produced.

Presentational conventions

The provisions of this standard are presented in roman (i.e. upright) type. Its recommendations are expressed in sentences in which the principal auxiliary verb is "should".

Commentary, explanation and general informative material is presented in smaller italic type, and does not constitute a normative element.

Contractual and legal considerations

This publication does not purport to include all the necessary provisions of a contract. Users are responsible for its correct application.

Compliance with a British Standard cannot confer immunity from legal obligations.

Introduction

Living with a disability can provide many challenges to individuals, their families and carers throughout their everyday lives. In some circumstances a wheelchair might be beneficial to assist with mobility. The design and function of a wheelchair and seating system, however, can vary widely depending on the age, needs and physical characteristics of the user and carers.

Greater freedom of mobility and access to safe transport lies at the heart of many day-to-day activities for all members of society. Similarly, safe transport for wheelchair users is a key element in an individual's ability to access medical facilities as well as participate in education, work and leisure. A seat in a motor vehicle is an additional consideration to be addressed by wheelchair manufacturers and equipment prescribers when taking into account the users' many differing rewards.

Presenting essential information for wheelchair securement, occupant restraint and other needs of the wheelchair user to transport providers in a clear manner with a common method of operation can not only reduce risks associated with travel, but enable greater confidence for the passenger, their carers and families in the achievement of social inclusion.

1 Scope

This British Standard gives recommendations for the provision and operation of systems to present essential information required by wheelchair users, their carers, vehicle drivers and their assistants, for the safer transport of wheelchair seated passengers in a road vehicle.

This British Standard also gives clarification on the roles and responsibilities of all parties engaged in the provision of wheelchairs, seating systems and wheelchair accessible transport services. This includes equipment prescribers, transport managers and transport commissioners, and outlines a risk oriented approach to maximizing passenger safety.

NOTE 1 These recommendations are intended to operate in conjunction with transport providers operating risk assessment procedures as part of a risk management process.

NOTE 2 While the information provided by a scheme might be relevant, it would not provide a wheelchair user additional right to travel on public transport.

*NOTE 3 Wheelchair users and their care providers have a responsibility in providing information pertinent to their safe transport (**3.2.1**).*

2 Terms and definitions

For the purposes of this standard, the following terms and definitions apply.

2.1 add-on components
hardware that is attached to the wheelchair frame subsequent to sale by the wheelchair manufacturer, in order to enhance design and/or performance of the wheelchair

NOTE Tools might be required to fit or remove add-on components, for example, seat back extensions, trays, spoke guards, head supports and oxygen cylinder carriers.

2.2 anchorage
assembly of components and fittings by which loads are transferred directly from the wheelchair tie-down to the vehicle, or from the occupant restraint to the vehicle, wheelchair, wheelchair tie-down, or vehicle interior component

2.3 boarding aid
device intended to facilitate wheelchair access to vehicles

2.4 driver
individual who drives the passenger vehicle

NOTE The driver has overall responsibility for all matters regarding the safety of passengers.

2.5 forward facing
orientation in which the wheelchair-seated passenger faces the front of the vehicle with the wheelchair reference plane within ten degrees of the longitudinal axis of the vehicle

2.6 four-point tie-down
wheelchair tie-down system that attaches to the wheelchair frame at four separate securement points and also attaches to the vehicle at four separate anchorages

NOTE Some manufacturer instructions for use might require additional tie-downs.

2.7 harm
physical injury or damage to the health of people, or damage to property or the environment

2.8 hazard
potential source of harm

2.9 head support
device attached to a wheelchair or seating system, used to position or accommodate the user's head

NOTE A head support is not the same as a head restraint, which is a device whose purpose is to limit the rearward displacement of an adult user's head in relation to his torso in order to reduce the danger of injury to the cervical vertebrae in the event of an accident.

2.10 nominated representative
person within a local authority licenced vehicle transport operation who is named as responsible for the day-to-day running of the business

*NOTE **2.26** gives examples of other transport operators.*

2.11 occupant restraint
assembly of webbing and hardware intended to restrain a wheelchair user during normal vehicle movement or an impact in order to prevent ejection, and prevent or minimize contact with the vehicle interior components and other occupants

2.12 passenger assistant
person or persons who assist the driver with the safety of vehicle passengers

2.13 passport
document attached to a wheelchair, containing key instructions and information regarding provisions for the needs of an individual and their wheelchair in transport

2.14 passenger lift
vehicle boarding aid consisting of a platform that can be mechanically raised or lowered, connecting different levels between ground and vehicle

2.15 postural support device
component used to support a person in a desired seated position, but is not intended to provide occupant restraint in a vehicle impact

2.16 prescriber
professional who gives directions for the allocation of a suitable wheelchair, or wheelchair and seating system combination, to suit the needs of a person with disability

2.17 ramp
vehicle boarding aid consisting of an inclined surface connecting different levels between ground and vehicle

2.18 rearward facing
orientation in which the wheelchair seated passenger faces the rear of the vehicle with the wheelchair reference plane within ten degrees of the longitudinal axis of the vehicle

2.19 recline
change of back support angle from an upright sitting position towards a supine position without moving the seat

2.20 risk assessment coordinator
person who is responsible for gathering and collating all the information from relevant sources to produce the passport

2.21 securement point
point on the wheelchair to which wheelchair tie-downs are connected

2.22 shoulder-belt restraint/upper torso restraint
assembly of webbing and hardware intended to limit movement of the head and chest during a crash by application of restraint forces to either or both clavicles

2.23 three-point restraint
occupant restraint assembly with three anchorages comprised of both a pelvic-belt restraint and a diagonal shoulder-belt restraint that connect together near the hip of the occupant

2.24 transfer
action where a wheelchair user moves from their wheelchair to a vehicle seat

2.25 transport commissioner
person or organization with the authority to request or procure the provision of transport services

NOTE A commissioner might be a local authority, transport provider, private organization or the individual wheelchair user.

2.26 transport manager
person or persons responsible for the continuous and effective control of the management of transport operations of a transport provider working with a standard operating licence, or under permit regulations

2.27 transport operator
individual or group of individuals who provide accessible transport services for the carriage of passengers

NOTE Operations might function on a profit or not-for-profit basis.

2.28 tilt
type of wheelchair design that enables the complete seat structure to rotate so that the seated occupant can be placed in a range of positions from upright to recumbent

NOTE While a recumbent position might be required for clinical reasons, a typical angle change is usually in the order of 30°.

2.29 wheelchair footprint
space outlined on the horizontal wheelchair ground plane by projecting vertically down from the outermost edges of the structural members that comprise the mobile base and seat of the wheelchair

2.30 wheelchair user
individual seated in a wheelchair

2.31 wheelchair tie-down/wheelchair securement
device or system designed to secure a wheelchair in place in a motor vehicle

2.32 wheelchair tie-down and occupant restraint system (WTORS)
complete restraint system for wheelchair seated passengers comprised of equipment for wheelchair tie-down and a belt-type occupant restraint

3 Operational framework

*COMMENTARY ON CLAUSE **3***

A wheelchair passport gives key information to transport providers, drivers and passenger assistants. It relates to the provision of safe transport of individual wheelchair seated passengers travelling in road vehicles and presents the information in a consistent way so as to be easily accessible.

The passport is intended to be attached to a wheelchair, clearly visible to the vehicle operator and designed to hold pertinent details, presented in a clear, safe, reliable and durable format. The extent of information supplied depends on the complexity of the individual's disability.

Implementation of the scheme is intended to provide enhanced risk control for all wheelchair seated passengers. However, the advantages in the delivery of clear information and instruction to drivers and their assistants will be at a maximum where the complexity of needs of a passenger is higher. It is therefore envisaged that the roll-out of the scheme would initially be most beneficial for passengers with more complex needs before the eventual introduction for all wheelchair seated passengers.

3.1 Wheelchair passport creation

3.1.1 General

The transport commissioner, working in conjunction with the transport manager or nominated representative within the organization of the transport provider, should ensure that a wheelchair passport is created for each identified service user, with information gathered from relevant stakeholders (**3.3.1**).

3.1.2 Information from the wheelchair user

The following information should be obtained from the wheelchair user, or an individual acting on their behalf:

a) general requirements relating to their comfort and interaction with others during transport;

b) any specific requirements to maintain their posture or position during transport;

c) an exemption certificate that has been issued by their GP, in circumstances where a user is unable to use an occupant restraint due to their condition;

NOTE 1 User requirements do not automatically override manufacturers' recommended use.

d) specific requirements for the need of medical equipment, e.g. oxygen etc.; and

e) any specific action to take in the event of a medical emergency (**4.2.2**).

NOTE 2 Where an exemption certificate has been issued, additional risk control measures might be necessary to ensure the safety of the user and other passengers travelling in the vehicle. The need for such consideration is highlighted in the transport risk assessment template given in Annex A.

3.1.3 Information from the wheelchair and seating prescriber

The transport commissioner, working in conjunction with the transport manager or nominated representative within the organization of the transport provider, should ensure that systems are in place that enable the risk assessment coordinator to create a wheelchair passport for each identified user with information gathered from relevant stakeholders (**3.3.1**).

The following should be obtained from the wheelchair and/or seating prescriber:

a) details of the current prescription and any other recommendations;

b) confirmation that the user has been provided with a wheelchair that addresses their clinical, functional and lifestyle requirements;

c) confirmation that the user or the user's carer has been provided with operational instructions for use and warnings about limitations where required;

NOTE 1 This is especially important when a piece of equipment or combination of pieces of equipment departs from manufacturers' instructions for use.

d) confirmation that the prescription has been issued in consultation with a qualified clinical wheelchair prescriber (e.g. physiotherapist, occupational therapist or private retailer organizations) as required;

e) confirmation that the following have been taken into account during the prescription process:

1) manufacturer statements of suitability for use in transport;

2) limitations of use;

3) warnings that apply whilst used in transport;

4) wheelchair and seating system stability when occupied;

5) the use of postural support devices;

NOTE 2 Postural support devices might include belts, thoracic pads, trays, knee blocks, pommels or foot straps.

6) the use of communication devices;

7) requirement for special tie-down equipment;

8) the need for add-on components; and

NOTE 3 Add-on components might include oxygen cylinders, ventilators or feeding systems.

9) which components should be removed from the wheelchair during transport, e.g. knee blocks and oxygen cylinders, and secured separately within the vehicle.

f) where a departure from the manufacturers' instructions for use is required due to a user's specific clinical need, demonstration that a risk management process has been implemented to reduce risks to an acceptable level, with consideration given to the benefits of travel.

3.1.4 Information from the wheelchair and seating manufacturer

NOTE Attention is drawn to the Medical Devices Regulations 2002 [4] and to the requirements for manufacturer information given in BS EN 12183 and BS EN 12184.

The following should be obtained from the wheelchair and seating manufacturer:

a) instructions for use, which include:

1) the seating orientation of the wheelchair;

2) the maximum weight of the wheelchair, including add-ons components;

3) what types of add-on components are compatible;

4) the generic type of tie-down that should be used, including the rated capacity of the tie-downs used; and

5) images of securement point locations on the wheelchair.

b) information on the use and attachment of postural support devices such as a head support, thoracic or pelvic supports, knee blocks and foot straps;

c) labelling of securement point locations; and

d) confirmation that the interface mechanism between the seating unit and the host wheelchair is capable of sustaining loads created by a crash event.

3.2 Roles, responsibilities and skills

3.2.1 Wheelchair users, parents and care providers

Information relating to the essential requirements of the wheelchair user when in transport (**3.1.4**) should be made available to personnel conducting risk assessment by the wheelchair user or a person acting on their behalf.

NOTE The wheelchair user, or a responsible person acting on their behalf, is responsible for ensuring that their wheelchair receives regular maintenance, including but not limited to, tyre inflation, component attachment, frame integrity and brake functionality.

3.2.2 Wheelchair and seating equipment prescribers

3.2.2.1 Wheelchair and seating prescribers providing information for the creation of the wheelchair passport should demonstrate awareness of all aspects of the risks involved with the prescription and provision of equipment.

3.2.2.2 Wheelchair and seating prescribers should ensure that hardware and components are suitable for use in transport.

3.2.2.3 In the case of more complex prescriptions, when equipment might not be approved in combination, wheelchair and seating prescribers should ensure that risks of failure during transport are reduced to as low as reasonably possible.

3.2.2.4 Wheelchair and seating suppliers should record and demonstrate that a risk assessment process of individual and combined components has been undertaken.

3.2.2.5 Wheelchair and seating prescribers should provide clear instruction to users and care providers of the position and function of postural support devices in transport.

NOTE Such devices include head supports, tray, thoracic support systems, pelvic positioning systems, knee blocks, pommel and toe straps.

3.2.3 Transport commissioners, operators, drivers and passenger assistants

3.2.3.1 Transport commissioners and transport operators should ensure that a full risk assessment covering wheelchair users, other passengers and transport staff is carried out before transport services are undertaken.

NOTE 1 An example of a transport risk assessment template is given in Annex A.

NOTE 2 Attention is drawn to Health and Safety at Work Act 1974 [1] Section 3 (1), (2) and (3) and Section 33 (1) a), b) and c), The Road Traffic Act 1988 (amended 1991) [3] and the Road Vehicles (Construction and Use) Regulations (1986) [4].

NOTE 3 Transport operators commonly operate with a driver and a passenger assistant working together closely as a team to focus on particular tasks of transport operations. It is by sharing tasks and responsibilities as a team that allows the driver to focus his attention on control of the vehicle and ensure safety and comfort for all passengers. This approach is preferable although not essential.

3.2.3.2 Transport commissioners should employ service agreements and these should inform transport operators that they are responsible for the safety of the wheelchair user throughout their journey, and while:

a) siting the vehicle in a location suitable for safe boarding;

b) ensuring as far as possible the safe transit of the wheelchair user to and from the vehicle;

c) boarding and alighting the vehicle using ramps or passenger lifts;

d) securing the wheelchair;

e) fitting a user restraint system; and

f) storing and securing items removed from the wheelchair, e.g. oxygen cylinders.

3.2.3.3 All drivers and passenger assistants employed by the designated transport operator should have:

a) disability awareness, experience or training;

b) knowledge/training in conflict resolution;

c) knowledge/training in emergency egress; and

d) knowledge of manual operation of powered equipment, such as passenger lifts, ramps and doors.

NOTE Attention is drawn to the provisions of the disclosure and barring service (DBS) established under the Protection of Freedoms Act 2012 [5].

3.2.3.4 All drivers and passenger assistants employed by the designated transport operator should have completed training in the use and operation of vehicle passenger lifts/ramps, wheelchair tie-downs and occupant restraint systems.

3.2.3.5 Any individual performing a risk assessment prior to transport commencing should be suitably qualified in the use and operation of WTORS and have experience in wheelchair accessible passenger transport.

3.2.3.6 Any transport operator that has been commissioned should have procedures in place to deal with:

a) passenger medical emergencies;

b) vehicle breakdown;

c) vehicle collision;

d) on-board power failure;

e) reporting of road traffic incidents;

f) reporting of adverse incidents involving wheelchairs; and

g) reporting of perceived defects with wheelchairs and tie-down equipment.

3.3 Inter-agency working

3.3.1 There should be clear and comprehensive communication between all stakeholders. Stakeholders include, but are not limited to:

a) the wheelchair user and their carer;

b) the wheelchair manufacturer and seating system manufacturer;

c) the wheelchair prescribing clinician;

d) the WTORS manufacturer;

e) private retail organizations;

f) the transport commissioner;

g) the transport operator; and

h) the education authority, for a child with special educational needs.

3.3.2 Stakeholders should work together to identify:

a) the specific needs of the user;

b) the limitations of prescribed equipment;

c) available and suitable vehicle facilities;

d) the need for any specific personnel training; and

e) the existence of a Medicines and Healthcare Products Regulatory Agency (MHRA) Field Safety Notice (FSN), or Medical Device Alert (MDA) relating to a wheelchair.

4 Information for the wheelchair passport

*COMMENTARY ON CLAUSE **4***

During the collection of information for an effective passport, it might be necessary to collect information of a personal nature. Attention is drawn to the Data Protection Act 1998 [6].

4.1 General

4.1.1 Only information relevant to the specific wheelchair seated passenger should be included on the passport.

4.1.2 Information should be made available to the transport operator before a user starts using a transport service to reduce the chance of problems occurring at the vehicle.

NOTE 1 This might highlight the need for increased space for the wheelchair, storage space or luggage straps. It also enables the operator to advise the user/prescriber of any space restrictions that could limit the transportation of wheelchairs.

4.1.3 Informed consent should be sought from the user or a responsible person acting on behalf of the user before any information is collected.

4.1.4 Passports should contain a date by which time a review of the information should be conducted.

4.1.5 The passport should be replaced when the wheelchair user's needs or equipment change.

4.1.6 Passports should contain details of the identity of the risk assessment coordinator overseeing the risk assessment process and creation of a passport document.

NOTE 2 An example of a wheelchair passport is given in Annex B.

4.1.7 All information that can be used to identify the passport holder should be stored in a secure manner in line with the policies of the transport commissioner.

NOTE 3 Attention is drawn to the Data Protection Act 1998 [6].

4.2 Wheelchair user information

4.2.1 Personal information

4.2.1.1 The passport generation process should produce and contain a unique means of identification for each individual passenger.

NOTE This is usually in the form of a reference number in order to protect the user. A user's name, or how they wish to be referred to, can be included with the consent of the user or their carer.

4.2.1.2 The passport should contain information regarding the user's:

a) ability to transfer to a vehicle seat;

b) seating orientation (subject to the outcome of the risk assessment, see Annex C);

c) preferred location in vehicle;

d) kerb climbing limitation; and

e) preferred speech communication method (e.g. speech, British sign language, etc.).

4.2.1.3 Any additional relevant medical information should only be included with the user's or carer's consent.

4.2.2 Medical emergency information

4.2.2.1 The passport should include details of a user's dependence on medical devices either attached to their wheelchair or vehicle mounted, while in transport.

NOTE Dependence on medical devices attached to a wheelchair require additional risk control measures to reduce the risk of injury to the user and other passengers travelling in the vehicle.

4.2.2.2 The passport should include details of actions to be taken and who to contact in an emergency.

NOTE The passport might include details of how to safely remove the wheelchair user from their seat in event of an emergency, taking into account any medical equipment they use or are fitted with.

4.3 Wheelchair and seating information

4.3.1 Wheelchair information

The passport should include the information listed in a) to n), where applicable:

a) the wheelchair make, model and serial number;

b) whether the wheelchair is recommended for use in a motor vehicle;

NOTE 1 If the wheelchair and associated seating, including add-on components, is not recommended by the manufacturer as suitable for use in transport, then a collaborative risk assessment is required between the prescriber and transport provider.

c) seating orientation of the wheelchair, forward or rearward facing;

d) combined weight of wheelchair, seating and user;

e) the generic type of wheelchair securement system to be used;

f) the required rated load capacity for tie-downs;

g) the location of tie-down points on the wheelchair front and rear;

h) agreed seat tilt and recline angles taking into consideration manufacturers' recommendations;

NOTE 2 Agreed settings are achieved by the process of risk management.

i) how to turn off the control system to prevent accidental operation of a powered wheelchair;

j) add-on components required during transport, e.g. medical devices etc.;

k) wheelchair safe slope rating;

l) safe kerb climb height;

m) any requirements for stowage of removable items/accessories during transport; and

n) occupant restraint system requirements.

4.3.2 Seating system

The passport should include the information listed in a) to f), where applicable:

a) whether the seating system is suitable for use in transport;

NOTE 1 If the wheelchair, including any add-on components, is not recommended by the manufacturers as suitable for use in transport, then

personnel conducting the risk assessment are required to provide clear instructions on the means to secure the wheelchair and routeing of the occupant restraint system.

b) seating orientation, forward or rearward facing;

c) agreed seat tilt and recline angles;

NOTE 2 Agreed settings are achieved during the process of risk management.

d) changes in the position of postural support devices;

e) removal of any device e.g. a tray, pommel or knee block; and

f) changes to the adjustment of webbing type postural belts.

4.4 Transport requirements

4.4.1 Vehicle entry/exit lifts/ramps

The passport should contain the information listed in a) to e), where applicable:

a) minimum passenger lift capacity required;

b) minimum passenger lift dimensions required;

c) whether a passenger assistant is required to ride on passenger lift;

d) maximum ramp angle permitted; and

e) kerb climbing limitations of the wheelchair and/or user.

4.4.2 Tie-down information

The passport should include the information listed in a) to f), where applicable:

a) wheelchair manufacturer recommended tie-down;

b) generic type of tie-down;

c) tie-down rated capacity;

d) preferred end fittings;

e) the requirement for a model specific tie-down system; and

f) images of tie-down location.

4.4.3 In-vehicle spatial requirements

The passport should detail the size of the wheelchair footprint, and the additional space required for the correct fitment of wheelchair tie-downs and occupant restraints.

4.4.4 Additional information

The passport should relay any additional information required for the care of the user.

NOTE This often relates to the specific clinical needs of the user and might include the operational requirements and use of medical devices attached to the wheelchair and seating system.

5 Passport design

5.1 Layout

5.1.1 The layout of a wheelchair passport should be structured in a manner that is capable of conveying the information required for the wheelchair seated passenger.

NOTE Mobile tagging may be considered for inclusion in the design, which would link the passport to further information via a quick response code (QR Code) scanned by a mobile camera phone or reader.

5.1.2 Generic information such as wheelchair passenger coded identity, wheelchair type, combined mass of wheelchair and occupant, seating orientation, tie-down type, occupant restraint system type and emergency contact details, should be presented on the first pages of the passport.

5.1.3 Specific detailed requirements of the wheelchair seated passenger should follow the generic information (see Annex B).

5.1.4 Where it is essential for information of a sensitive or secure nature to be included in the passport, it should be with the written agreement of the passport holder or their representative.

NOTE A transport operator might wish, with permission of the user or carer, to avail themselves of knowledge of any secure and sensitive information that might be relevant to a safe journey. Sensitive or secure information might include medication required or home address. A copy of this documentation would also be held by the user for use with other transport providers.

5.2 Durability

5.2.1 The passport should be waterproof.

5.2.2 The passport should be of sufficient strength that it cannot be torn easily.

5.3 Accessibility

5.3.1 The size and font used should be chosen with due consideration to the ease of reading.

5.3.2 If colour is being used, the contrast of colours should be such that the text is still clearly legible on the background.

5.4 Use of images

5.4.1 Pictorial representations should be used where appropriate in addition to any instructions.

5.4.2 Any photographs used should be high resolution and scaled in a consistent ratio.

5.4.3 Any images used on the passport should avoid including identifiable faces, unless approved by the wheelchair user or a person acting on their behalf.

5.5 Mounting

The passport should be mounted on the wheelchair in a clear and accessible place.

5.6 Replacement

Systems should be in place that enable amended, lost or damaged passports to be replaced at short notice.

6 Marking

To assist with cross boundary movement, each wheelchair passport should be legibly and permanently marked with the number and date of this British Standard [1)] and the name or logo of the issuing authority.

[1)] Marking BS 8603:2013 on or in relation to a product represents a manufacturer's declaration of conformity, i.e. a claim by or on behalf of the manufacturer that the product meets the requirements of the standard. The accuracy of the claim is solely the claimant's responsibility. Such a declaration is not to be confused with third-party certification of conformity.

Annex A (informative) Example of a transport risk assessment process and template

A.1 General

Transport commissioners, operators, drivers and passenger assistants have responsibility for the safety of a wide range of passengers, each with their individual requirements. Wheelchair seated passengers might be exposed to hazards that would not normally occur for passengers who use a vehicle seat.

It is by the application of risk assessment that risks can be controlled and reduced to acceptable levels when balanced against the benefits that travel can offer the passenger.

Effective risk management therefore requires appropriate skills that employ experience, insight and judgement in a systematic manner to manage the various risks associated with transport.

A.2 Collaboration and information sources

The transport risk assessment process is undertaken and overseen by persons within the organizations of the transport commissioner, the transport manager, a nominated representative of a transport operator or a combination working in collaboration.

Information relating to detailed clinical aspects of the passenger's wheelchair prescription might often be less accessible for reasons of confidentiality, following medical protocols. Pertinent information of a clinical nature relating to the safety of a passenger is therefore far more likely to be passed to the care provider of the individual.

Under these general circumstances, relevant clinical information relating to the transport of the wheelchair seated passenger may be provided to risk assessment personnel by the care provider.

A.3 Risk assessment process

The transport risk assessment process has been divided into the following parts, as illustrated in Tables A.1 to A.6.

Part 1 Passenger/service user identification

Part 2 Passenger mobility

Part 3 Passenger medical information

Part 4 Passenger behaviour

Part 5 Passenger communication

Part 6 Risk assessment summary

Table A.1 **Part 1: Passenger/service user identification**

Passenger Reference No.			
Name			
Date of birth			
Address			
Transport purpose (e.g. education, work, leisure, patient transfer)			
This risk assessment applies to the vehicle types indicated	M1	Car/taxi	
	M2	Minibus	
	M3	Bus	
Details of transport risk assessor			
Print name			
Signature			
Job title or department			
Contact details			
Date			
Frequency of review			
Date of next review			
Additional comments			

Table A.2 **Part 2: Passenger mobility**

2.1	Does the passenger require assistance to board and alight the vehicle?			Yes	No
	Details:				
	Risk control measures:				
2.2	Does the passenger use a walking frame?			Yes	No
	If Yes, how is the walking frame stowed:				
	Risk control measures:				
2.3	Is the passenger a wheelchair user?			Yes	No
2.3.1	If Yes, is the passenger able to transfer to a vehicle seat?			Yes	No
2.3.2	If Yes, how is the wheelchair to be stowed?	Folded and secured to vehicle side wall			
		Secured with 4 point tie-downs			
		Other:			
		Risk control measure detail:			
2.3.3	If No and the passenger is to remain seated in their wheelchair, does the passenger possess more than one wheelchair model that may be used in transport?			Yes	No
	Details:				
2.3.3.1	Wheelchair 1 - make and model	Type		Transportable	
		Manual		Yes	
		Powered		No	
	Means of wheelchair securement	Std. 4-point tie-down		Special system	
2.3.3.2	Wheelchair 2 - make and model	Type		Transportable	
		Manual		Yes	
		Powered		No	
	Means of wheelchair securement	Std. 4-point tie-down		Special system	
2.4	Are there any specific instructions regarding the use of an access ramp or passenger lift platform?			Yes	No
	Details:				
	Risk control measures:				

Table A.3 **Part 3: Passenger medical information**

3.1	Does the passenger have posture that could affect the use of a three point occupant restraint system? Such as:		
	Reclined seat back	Yes	No
	Pelvic obliquity	Yes	No
	Require tilt in space position	Yes	No
	Other	Yes	No
	Details:		
	Risk control measures:		
3.2	Does the passenger require webbing based postural support devices to maintain their upright posture? (These might include shoulder-belt restraint/upper torso restraint)	Yes	No
	Details:		
	Risk control measures:		
3.3	Does the passenger require postural support devices such as a tray, knee blocks, a pommel or foot straps to maintain their positioning whilst in transport?	Yes	No
	Details:		
	Risk control measures:		
3.4	Does the user have an existing postural head support?	Yes	No
	Details:		
	Risk control measures:		
3.5	Does the passenger have a medical condition likely to be affected by transport?	Yes	No
	Details:		
	Risk control measures:		
3.6	Does the passenger have epilepsy and/or prone to seizures?	Yes No	
	Details:		
	Risk control measures:		

Table A.3 **Part 3: Passenger medical information**

3.7	Does the passenger experience muscular spasm?	Yes No
	Details:	
	Risk control measures:	
3.8	Does the passenger need the support of medical devices such as oxygen supply, ventilator, suction device or feeding system?	Yes No
	Details:	
	Risk control measures:	
3.9	Has the passenger been issued with a formal medical exemption certificate for the use of an occupant restraint system?	Yes No
	Details:	
	Risk control measures:	
Additional comments		

Table A.4 **Part 4: Passenger behaviour**

4.1	Does the passenger display behavioural difficulties such as anxiety or fear?	Yes	No
	Details:		
	Risk control measures:		
4.2	Does the passenger display unpredictable behaviour?	Yes	No
	Details:		
	Risk control measures:		
4.3	Does the passenger display verbal abuse?	Yes	No
	Details:		
	Risk control measures:		
4.4	Does the passenger display physical abuse?	Yes	No
	Details:		
	Risk control measures:		
4.5	Does the passenger display self-abuse?	Yes	No
	Details:		
	Risk control measures:		
4.6	Does the passenger display another form of behavioural difficulty?	Yes	No
	Details:		
	Risk control measures:		
Additional comments			

Table A.5 **Part 5: Passenger communication**

5.1	Does the passenger have a hearing or speech impairment?	Yes	No
	Details:		
5.2	Does the passenger use a communication aid?	Yes	No
	Details:		
5.3	Can the communication aid remain attached to the wheelchair whilst in transport?	Yes	No
	Details:		
	Risk control measures:		
5.4	Does the passenger have a visual impairment?	Yes	No
	Details:		
	Risk control measures:		
5.5	Are there any comments relating to achieving effective communications with the passenger?	Yes	No
	Details:		
Additional comments			

Table A.6 **Part 6: Risk assessment summary**

6.1	Have all parts of the risk assessment process been completed?	Yes	No
	Outstanding parts:		
	Action:		
6.2	Is there a need for additional or specific wheelchair securement hardware?	Yes	No
	Details:		
	Action:		
6.3	Is there a need for additional or specific occupant restraint systems?	Yes	No
	Details:		
	Action:		
6.4	Is there a need for additional or specific postural support devices during transport?	Yes	No
	Details:		
	Action:		
6.5	Is there a need for additional or specific driver or passenger assistant training or instructions in case of medical event?	Yes	No
	Details:		
	Action:		
6.6	Has a planned equipment review date or frequency been established?	Yes	No
	Details:		
	Action:		

Table A.6 **Part 6: Risk assessment summary**

6.7	Have all relevant parties been made aware of the contents and outcomes of this risk assessment process?
	Print name: Signature of passenger/carer: Date:
	Print name: Signature of risk assessor: Date:

Annex B (informative)

Passport example

The following template gives an example that could be used for a wheelchair passport.

Table B.1 **Passport example**

Logo/name of issuing body			W/C make/model	
			Serial no.	
			Transportable	Yes/No
Passenger reference			Combined weight (w/c, seating and occupant)	
Preferred name			Required floor dimensions	
Passport review date			Orientation	Forward/rear facing
Transfer			Tie-down type	
Issued by			Tie-down rating	
Emergency contact			Occupant restraint type	

Table B.1 **Passport example**

Tie-down point Front	Tie-down point Front
Photo	Photo
Tie-down point Rear	Tie-down point Rear
Photo	Photo
Occupant restraint	Occupant restraint
Photo	Photo

Table B.1 **Passport example**

Wheelchair settings		Posture belts and postural support devices	
Tilt angle		Photo	Photo
Recline angle			
Head support			
Tray			
Foot straps			
Pommel/Knee block			
Powered wheelchair on/off switch		Notes:	
Preferred location within vehicle		Additional information (e.g. medical devices required during transport)	
Safe slope rating			
Safe kerb climb height			
Medical emergency information			

Annex C (normative) Risk considerations and awareness

C.1 General

The recommendations given in **C.2** to **C.4** should be taken into account when conducting the transport risk assessment and followed.

If any of these recommendations cannot be followed, justification should be provided in the risk assessment documentation.

NOTE Details and an example of a transport risk assessment template are given in Annex A.

C.2 Vehicle seat transfer

C.2.1 A wheelchair user should be allowed to transfer from their wheelchair to a vehicle seat if they can do so independently and without causing pain or discomfort and can use the seat belt.

C.2.2 In cases where the user has transferred to a vehicle seat, their wheelchair should be secured as an item of luggage in a designated area, ensuring that gangways and access to exits are not obstructed.

NOTE Four-point tie-downs may be used to secure an unoccupied wheelchair.

C.3 Wheelchair seated passengers

C.3.1 Transport commissioners and transport operators should use formal service agreements which specify the highest level of safety for wheelchair seated passengers.

C.3.2 When a wheelchair is used in a standard format, manufacturers' instructions for use in transport, as provided in the user manual, should be followed.

C.3.3 Occupant restraint systems should be fitted to the following specifications:

a) the lap belt routed through the wheelchair or seating system so that the lap section fits low on the pelvis of the user to avoid the risk of abdominal intrusion;

NOTE Gaps in seating systems can enable preferred lap belt routing on the pelvis of a user.

b) lap belt anchorages positioned as close as possible to the rear of the wheelchair so that, when viewed from the side, a minimum angle of 30° and preferably between 45° and 75° to the horizontal is achieved;

c) the upper anchorage or effective upper anchorage of a three-point restraint system situated behind the user at or above their shoulder height; and

d) the shoulder belt section of an occupant restraint system routed to lay over the sternum and clavicle of the occupant's upper torso.

C.3.4 Wheelchair tie-downs should have a rated capacity capable of securing the mass of the unoccupied wheelchair. The mass of the unoccupied wheelchair, add-on components and seating system should be checked.

NOTE Wheelchairs and seating systems with integrated occupant restraints can impart additional loads to a tie-down system. The tie-down rated capacity is specified in tie-down manufacturers' instructions for use.

C.3.5 Wheelchair tie-downs and occupant restraint systems should be inspected regularly following manufacturers' maintenance instructions.

NOTE Equipment is usually considered for replacement after five years, depending on intensity of usage.

C.3.6 Vehicle anchorage systems should be checked for:

a) compatibility with tie-down fittings;

b) dirt ingress preventing effective engagement; and

c) local damage or wear preventing effective engagement.

C.4 Entry and exit

C.4.1 Drivers and passenger assistants should be trained in the correct use of boarding aids such as a passenger lift or ramp.

C.4.1.1 Training in the use of boarding aids should cover use in both normal and emergency situations.

C.4.1.2 Training should include the operation of powered equipment in case of a power failure.

C.4.2 When possible, drivers or passenger assistants should accompany passengers on the lift or ramp provided that this does not exceed the load capacity.

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For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

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