

CHCCCS026

Transport individuals

Release 1

Learner guide

Aspire Version 1.1



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Before you begin

This learner guide is based on the unit of competency *CHCCCS026 Transport individuals*, Release 1. Your trainer or training organisation must give you information about this unit of competency as part of your training program. You can access the unit of competency and assessment requirements at: www.training.gov.au.

How to work through this learner guide

This learner guide contains a number of features that will assist you in your learning. Your trainer will advise which parts of the learner guide you need to read, and which practice tasks and learning checkpoints you need to complete. The features of this learner guide are detailed in the following table.

Icon	Feature	How you can use each feature
	Learning content	▶ Read each topic in this learner guide. If you come across content that is confusing, make a note and discuss it with your trainer. Your trainer is in the best position to offer assistance. It is very important that you take on some of the responsibility for the learning you will undertake.
	Examples	▶ These highlight key learning points and provide realistic examples of workplace situations.
	Practice tasks	▶ Practice tasks give you the opportunity to put your skills and knowledge into action. Your trainer will tell you which practice tasks to complete.
	Summaries	▶ Key learning points are provided at the end of each topic.
	Learning checkpoints	▶ There is a learning checkpoint at the end of each topic. Your trainer will tell you which learning checkpoints to complete. These checkpoints give you an opportunity to check your progress and apply the skills and knowledge you have learnt.

Foundation skills

As you complete learning using this guide, you will be developing the foundation skills relevant for this unit. Foundation skills are the language, literacy and numeracy (LLN) skills and the employability skills required for participation in modern workplaces and contemporary life.

The following table outlines specific foundation skills noted for your learning in this learner guide.

Foundation skill area	Foundation skill description
Learning	<ul style="list-style-type: none"> ▶ Understanding your job role, organisational procedures and legal responsibilities ▶ Managing your work and seeing how well you are going ▶ Making goals for yourself at work ▶ Seeking professional development opportunities for continuous improvement
Reading	<ul style="list-style-type: none"> ▶ Understanding how documents are presented and being able to navigate through documents ▶ Understanding industry- and job-specific terminology ▶ Interpreting key information in relevant documents ▶ Understanding routine workplace checklists and documentation
Writing	<ul style="list-style-type: none"> ▶ Planning, drafting and writing reports and documents ▶ Communicating through written letters, email and online ▶ Recording progress; reporting incidents
Oral communication	<ul style="list-style-type: none"> ▶ Clarifying instructions ▶ Providing information ▶ Supporting others through encouragement, negotiation and conflict resolution ▶ Using body language to model desired behaviour and responding to others' body language
Numeracy	<ul style="list-style-type: none"> ▶ Calculating costs, weights, measurements of height and distance ▶ Interpreting measurements
Teamwork	<ul style="list-style-type: none"> ▶ Working well with other people by cooperating, collaborating, encouraging and building rapport
Planning and organising	<ul style="list-style-type: none"> ▶ Planning your workload and commitments ▶ Implementing tasks ▶ Completing work on time ▶ Knowing how to deal with hazards and risks
Making decisions	<ul style="list-style-type: none"> ▶ Understanding and applying decision-making processes ▶ Reviewing the impact of your decisions
Problem-solving	<ul style="list-style-type: none"> ▶ Identifying problems ▶ Working out how to fix a problem using problem-solving processes. Reviewing the outcome
Innovation and creation	<ul style="list-style-type: none"> ▶ Recognising opportunities to develop and apply new ideas ▶ Generating ideas by thinking of new ways to do something ▶ Making suggestions to improve work

Foundation skill area	Foundation skill description
Technology and digital literacy	<ul style="list-style-type: none"> ▶ Efficiently using digitally based technologies and systems correctly and safely ▶ Accessing, organising and presenting information ▶ Using equipment correctly and safely

What do you already know?

Use the following table to identify what you may already know. This may assist you to work out what to focus on in your learning.

Topic	Key outcomes	Rate your confidence in each section
Topic 1 Prepare to transport clients	1A Confirming transport requirements	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1B Explaining the transport procedure	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1C Preparing for safe transportation	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 2 Transport the client and equipment	2A Transporting the client	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2B Using equipment safely	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 3 Deliver the client	3A Delivering the client and informing relevant personnel	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3B Returning transport equipment	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3C Completing reporting requirements	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident



Topic 1

In this topic you will learn about:

- 1A Confirming transport requirements**

- 1B Explaining the transport procedure**

- 1C Preparing for safe transportation**

Prepare to transport clients

Clients who receive service-based care will occasionally require assistance with moving from one location to another.

This may be due to an illness, injury, disability or age-related condition. It may also be due to a lack of access to personal transport through friends and family members.

Transportation services may help the client relocate from one part of a care facility to another, or from one physical site to another, such as their home to a health clinic in order to receive a health service.

To ensure transportation is conducted in a safe and efficient manner, you will need to make some preparations, including involving the client in the planning process.

1A Confirming transport requirements

Effective communication is needed when preparing to transport clients.

Take the time to engage in meaningful conversations with key people to gather and provide accurate information about the client's transport needs.

When you first arrive onsite, you will need to introduce yourself and ask questions to find out about the client's transport needs.

You will need to confirm:

- ▶ the destination
- ▶ the travel route
- ▶ the level of support that needs to be provided
- ▶ any unique requirements that you must meet to transport the client safely and on time.



The key personnel that you need to engage with include:

- ▶ the client who requires transportation assistance
- ▶ family members of the client
- ▶ primary carers who are employed to provide day-to-day assistance to the client
- ▶ organisational staff, such as nurses, doctors, health professionals and other staff working at care facilities and allied health professional (AHP) clinics.

Understanding transport requirements

You will need to talk directly with clients, carers and organisational staff to confirm the client's unique transport needs.

Unique needs may relate to their age, health status or level of disability, or the level of community or family support they receive.

The following clients may have unique transportation needs:

- ▶ clients with a physical or mental disability, impairment or illness, such as a visual or hearing impairment that impacts on self-care, movement and communication skills
- ▶ obese and overweight clients who require manual-handling equipment to enter and exit a vehicle
- ▶ clients who use mobility equipment, such as walking frames and wheelchairs – these may need to be loaded, unloaded and set up
- ▶ clients who use healthcare equipment, such as oxygen tanks and intravenous (IV) stands – these may need to be loaded, unloaded, set up and reconfigured
- ▶ pregnant clients, in particular where the client is late in their pregnancy or has experienced health complications
- ▶ clients with babies or small children
- ▶ clients with a range of cultural needs, such as restrictions on the level of personal touch that can be used.

When preparing to relocate a client, you will need to confirm several pieces of information about the task with the key personnel, including the client, carers and organisational staff. This includes the following.

Destination	This is the location or site where the client needs to go. This could be an internal room or ward, or an offsite location.
Mode of transport	This refers to how the client needs or prefers to be transported to their destination, such as in a passenger vehicle or client transit van, or in a bed, stretcher, trolley walker or wheelchair.
Time of arrival	This is when the client needs to arrive at their destination for their scheduled appointment.
Unique transportation arrangements	The client may have special nutrition and hydration needs, or unique aids such as a heat pack, blanket or cushion to help them remain comfortable. Unique requirements can also include how the client will enter and exit the vehicle.
Documentation requirements	You need to be aware of sign-out (client release) and other administration requirements to ensure the client is able to be released from the existing location.

Confirming level of support required

Clients require different levels of support during the transportation process.

This may include physical assistance to enter and exit the vehicle as well as access to medicine, food, water or physical aids while travelling to ensure their comfort during the trip.

It is important that you ask questions to gather as much information as possible to ensure you understand your responsibilities and the needs and preferences of the client.

Being aware of the unique needs of clients will allow you to respond effectively to each person and build better relationships with the people you are working with.

Legal and ethical considerations

You need to be aware of your legal and ethical responsibilities when preparing to transport clients.

Some of these responsibilities are outlined in the following table.

Duty of care

Duty of care describes the legal obligation to anticipate and prevent possible causes of injury and illness in the workplace. It is part of common law and it requires you to do what is fair and reasonable to prevent harm or injury to the person or their property.

Duty of care requires workers to take reasonable care to avoid acts or omissions that may cause foreseeable harm to any person. This means you must think ahead about possible hazards and risks to the person using your service, co-workers or others while following the organisation's policies and procedures, and acting with due care and skill.

Organisations and managers have a higher level of duty of care than ordinary workers to protect staff and visitors to the workplace.

Human rights

Human rights recognise the value of every person, regardless of background, where they live, what they look like, what they think or what they believe.

They are based on principles of equality and respect, shared across cultures, religions and philosophies.

Basic human rights include the right to:

- ▶ physical safety
- ▶ basic necessities, such as food and water
- ▶ free speech
- ▶ religious freedom
- ▶ freedom from discrimination and abuse
- ▶ an adequate standard of living, education and health.

Privacy, confidentiality and disclosure

Organisations and workers must protect all personal and sensitive information about clients and staff from loss, theft, damage and unauthorised access. This applies to written and verbal information.

Privacy laws require organisations and workers to have valid reasons for collecting, storing and disseminating information about individuals. There are also various guidelines on the time that files and records must be stored for.

When discussing a client's transportation needs, always maintain their privacy. You must seek permission or inform them if you will be sharing their health information with another person, such as an allied health practitioner. This includes not discussing or repeating a client's personal matters without their prior consent or while the client accessing the service is not present. If clients are unable to provide permission to share their health information, they may appoint a power of attorney and/or medical power of attorney.

Personal details of staff should also be kept private and should only be disclosed to others after the person has provided permission for the information to be shared.

Work role boundaries

Organisational policies and procedures as well as your position description document will define your role and responsibilities.

These documents are usually discussed during a job interview, or during your induction or orientation as a new employee. They provide a clear outline of the limits and responsibilities of your job role. This will help reduce misunderstandings because a list of tasks is explained.

As part of a work role boundary, you need to maintain a level of professional distance with clients and not become too friendly or share personal information about yourself. This can reduce the chance of a client becoming too dependent on you or making contact with you outside of work hours to ask for assistance.

On some occasions in the course of your job, it may be necessary for you to respectfully say no to people who request you to do tasks beyond your training and skills. This will ensure your safety and that of your clients. Examples include providing a service or administering certain types of medication that is outside your scope of training.

Work health and safety (WHS)

Manual handling refers to an action that requires a person to lift, carry, move, push or pull an item or person.

Individual support workers are at a high risk of musculoskeletal injury caused by lifting a weight that is too heavy for them or moving it incorrectly. Workplace policies and procedures are designed to reduce these risks, and training provides an opportunity to practise safe lifting.

Safe lifting practices involve using correct manual-handling techniques, using a team member for assistance and using mechanical aids where possible.

Common factors that contribute to injuries when handling clients and their equipment include:

- ▶ over-bending (flexion) at the spine, outside of its neutral 'S' curve position
- ▶ holding awkward postures under force for long periods (over two minutes)
- ▶ sudden or jerky movements
- ▶ fatigue
- ▶ poor posture.

You can read more about safe lifting techniques and musculoskeletal injuries as a result of poor lifting techniques at: <http://aspirelr.link/hazardous-manual-tasks>.

Example

Following workplace safety procedures

Nancy works in an aged care facility as an assistant in nursing (AIN). As part of her role, she helps clients get to their in-house appointments by assisting them to get out of beds and chairs and walk to the treatment rooms. Many of the clients have a manual-handling plan that tells the staff the safety requirements for assisting them to get in and out of bed.

Last week one of Nancy's colleagues, Paula, said she knew a better way to lift patients from years of experience and didn't need to use a plan. Nancy politely refused to help Paula with her method, saying she wanted to use the method she had been trained to use by her supervisor.

Nancy discussed the issue with her supervisor, Andrea, who supported her decision. Andrea told Nancy that if she had not followed the policies and procedures, she would be breaching her duty of care to her clients and placing herself, other workers and the client at risk.



Practice task 1

Question 1

Which of the following should you confirm with the client in relation to their transport needs? Select yes or no for each one.

- | | | |
|--|-------|------|
| a. When the client needs to arrive at their destination | * Yes | * No |
| b. The location or site where the client needs to go | * Yes | * No |
| c. A weekly meal plan for the client | * Yes | * No |
| d. How the client prefers to be transported to their destination | * Yes | * No |
| e. Unique nutrition and hydration needs | * Yes | * No |
| f. The amount you are being paid per kilometre for the task | * Yes | * No |

Question 2

Which of the following legal and ethical issues must be considered before transporting clients? Select all that apply.

- Maintaining the privacy of the client's personal information
- Using the correct manual-handling technique when lifting clients
- The ethnicity, gender and age of the client
- Ensuring the safety of clients, so far as reasonably practicable
- Ensuring the basic human rights of clients
- Saying no to requests to perform a job outside of your training

Question 3

List **three** client support needs you should ask about before transporting clients.

1B Explaining the transport procedure

Communicating effectively is one of the keys skills you need to deliver a high standard of service to your clients.

This will allow you to represent your organisation in a professional way and build positive relationships with carers, family members and other staff.

You will need to explain the plan you intend to follow with the client and check if any of the people you are working with have questions you can answer.



Transportation procedures

Every organisation has a set of procedures for how clients are to be relocated from one place to another.

These procedures are designed to ensure the safety of both you and the client.

Organisational transportation procedures are likely to address the following:

- ▶ identifying and managing hazards and risks
- ▶ client communication and consultation requirements
- ▶ how to assist clients when entering and exiting vehicles, including when additional help or equipment may be required
- ▶ client safety requirements
- ▶ methods for securing clients in a vehicle
- ▶ documentation and reporting requirements
- ▶ rights and responsibilities of clients and workers.

Procedures need to be followed as far as reasonably practicable. However, there will be some flexibility in how these procedures are applied based on the unique needs of the client and the task requirements.

Communicating and answering questions

Effective communication is about sharing useful information with the right people, in a way that each person can understand.

Once you have gathered information about the transportation task, you will need to communicate the procedure to the client, as well as other key personnel such as organisational staff, carers and family members.

This ensures all parties are aware of the process you will follow and that each person understands what to expect. This level of communication also gives everyone an opportunity to ask any questions they have about the process.

Here is a range of communication techniques you can practise.

Check your tone of voice

The way a person speaks can provide insight about their emotional state. The tone, pitch, volume, inflection, rhythm and rate of speech can provide useful information about how a person is feeling.

Think about how you use your voice when you express sarcasm, anger, affection, fear, happiness or confidence. For example:

- ▶ a flat tone may indicate that you would rather be elsewhere
- ▶ an abrupt tone may indicate irritation
- ▶ a high pitch can indicate nervousness, excitement, fear or anger
- ▶ a low pitch can indicate despair, sadness or loneliness
- ▶ a loud voice can indicate anger or aggression.

Check your body language

Communicating does not just mean speaking. Effective communication occurs when the intention or meaning of the message reaches the receiver.

Your body language will give others an indication of what you are thinking, how you are feeling and your level of confidence. Body language includes:

- ▶ maintaining eye contact when speaking and listening
- ▶ nodding when the other person is speaking
- ▶ maintaining a relaxed posture
- ▶ respecting someone's personal space.

Ask questions to gather information

Use questions to help you collect the information you need to assist a person with their transportation needs. Asking the wrong types of questions could result in incomplete information, which in turn could mean a person does not receive the support they require.

Open questions are used to encourage the other person to explain their needs.

For example:

- ▶ Where do you need to be transported to?
- ▶ What time do you need to arrive at the hospital?
- ▶ Which ward do you need to go to?

Closed questions are used to obtain 'yes' or 'no' answers and to confirm key details in the conversation.

For example:

- ▶ Do you need assistance getting from your wheelchair into the car?
- ▶ Can I assist you in taking your walker to the car?

Actively listen to the message

Active listening means listening with the intent of doing something with the information you receive. It means actively interpreting the information being communicated and participating in the conversation.

To actively listen, you should:

- ▶ stop what you are doing and focus on the person speaking
- ▶ use empathy to look at the situation from the other person's perspective
- ▶ eliminate or reduce any barriers and distractions and focus on the person speaking
- ▶ nod occasionally to show you are paying attention
- ▶ give verbal gestures as the person is talking, e.g. 'yes' or 'okay'
- ▶ paraphrase to show you have received the information clearly
- ▶ ask questions to clarify and confirm understanding if you are unsure about what has been said.

Answer questions

When a client, carer or support worker asks a question, answer them directly and truthfully. Provide only the information that they need, give accurate content to address their question and check that they have understood your reply before moving on.

Show positive body language when listening to and answering questions, including maintaining eye contact, facing the person and stopping any tasks you are doing. This shows that you value the person.

Show empathy when answering questions by acknowledging the person's interest or concern.

Adjusting your communication

You may need to adjust your communication according to the situation and individual client needs.

You should use words that the other person can understand and respect individual differences, including cultural norms, that impact on how people communicate.

Here are some examples of specific adjustments you may need to make to communicate with people with unique needs.

Non-English speaking background

- ▶ Speak slowly and clearly.
- ▶ Use simple words and sentence structures that the client can understand.
- ▶ Listen very carefully.
- ▶ Use open questions so the client gives you a full picture, e.g. 'Where do you need to go?'
- ▶ Check that you've understood correctly before taking action.

<p>Intellectual disability</p>	<ul style="list-style-type: none"> ▶ Understand that people with intellectual disabilities may or may not have physical disabilities as well. ▶ Try to communicate directly with the person – communicate with their carer or companion if you are unable to engage in a meaningful conversation with the client. ▶ Clarify and confirm information, rather than guessing what the person wants. ▶ Exercise patience and empathy.
<p>Hearing impairment</p>	<ul style="list-style-type: none"> ▶ Gain the person’s attention before talking, such as by waving or raising your hand. ▶ Look at the person as you talk. ▶ Speak naturally – don’t exaggerate your lip movements or speak louder than usual. ▶ Use simple language and sentences. ▶ Try to limit background noise. ▶ Use visual cues and gestures.
<p>Physical disability/ speech difficulty</p>	<ul style="list-style-type: none"> ▶ Listen carefully. ▶ Clarify and confirm information. ▶ Let the person know if you have trouble understanding something they said. ▶ Ask the person to repeat something until you understand. ▶ Be patient when talking to the person. ▶ Minimise distractions.
<p>Vision impairment</p>	<ul style="list-style-type: none"> ▶ Introduce yourself as you are walking toward the person. ▶ Ask the person what guiding technique they prefer.

Example

Transportation policy and procedures

Home Care Services specialises in helping clients living with a disability. Support workers are required to transport clients to and from their homes and take them to community activities and programs.

To ensure staff transport clients safely, Home Care Services has developed a client transportation policy and procedure. The document sets out the responsibility to ensure the health and safety of all workers and clients during all transportation activities. The policy also outlines the responsibilities and limitations of support workers and defines the scope of the job role. It outlines the resources and processes that will be made available to ensure employees can comply with their duty of care under health and safety legislation.



The client transportation procedures describe how the policy will be implemented by support workers, including:

- ▶ vehicle presentation and cleanliness standards
- ▶ vehicle and equipment safety checks
- ▶ communication and consultation with clients and key personnel
- ▶ client service standards
- ▶ assistance to be provided to disability clients
- ▶ administration and reporting
- ▶ first aid and emergency procedures
- ▶ reporting incidents, injuries and illnesses.



Practice task 2

Question 1

Which of the following communication principles should you follow when speaking with clients? Select all that apply.

- Make lots of jokes as a way of helping them understand what you are saying.
- Check your body language.
- Avoid answering questions as this is an unproductive use of your time.
- Actively listen to the message.
- Answer any questions clients have.

Question 2

List **three** topics that could be found in a procedure for transporting clients.

Question 3

Why is it important to communicate transport procedures to the client? Select all that apply.

- It ensures all parties are aware of the process and understand what to expect.
- The client's family needs to know where the client will be going and when they will be back.
- It helps to maintain the privacy and confidentiality of the client's personal information.
- It gives the client an opportunity to ask any questions they have about the process.

1C Preparing for safe transportation

Preparation helps to ensure clients are successfully transported from one location to another in the required timeframe.

Transporting clients can involve relocating a person from one area of a building to another, such as from one ward of a nursing home to their room, or from one location to another some distance away.

Good preparation means thinking ahead and considering what needs to happen and which order it needs to happen in. Think about the equipment and resources you need and the procedures you need to follow to complete the task safely and in the timeframes set.



Transport vehicle

- ▶ Ensure the vehicle is roadworthy and registered.
- ▶ Check that the vehicle is clean, tidy and presentable, inside and out.
- ▶ Check that the vehicle has sufficient fuel for the travel period.
- ▶ Ensure the vehicle has sufficient space to safely transport the client to the destination, including storage of the client's personal belongings and equipment, such as a wheelchair or walking frame.



Manual-handling equipment

- ▶ Ensure the type of manual-handling equipment to be used is suitable for the task of lifting and moving the client.
- ▶ Ensure the correct lifting technique is used for equipment, such as wheelchairs and trolleys.
- ▶ Check that the equipment is available when needed.
- ▶ Ensure the equipment is safe and in optimal condition.
- ▶ Ensure you are trained and competent to use the equipment safely.



Information and documentation

- ▶ Make sure you have the required documentation and information to pick up, transport and deliver the client to their intended destination, including:
 - medical records
 - personal identification and information
 - information for the release of the client from the pick-up location and access to the destination site.



Personal and health needs

- ▶ Consider the client's personal needs for a comfortable trip, including:
 - any personal belongings they wish to bring
 - nutrition
 - hydration
 - medical requirements
 - unique safety needs to ensure they are secured in the vehicle.



Destination and route

- ▶ Check where the client needs to be transported to, such as a street address or a particular hospital ward.
- ▶ Ensure the travel route to the destination is clear and that roadways are accessible.
- ▶ Ensure the client will arrive at their destination on time without lengthy delays.
- ▶ Confirm who the client needs to check in with when they arrive.
- ▶ Determine what information needs to be provided to the relevant person at the destination.

Example

Preparing to transport an elderly client

John is a support worker for Home Care Services. He has been tasked with the responsibility of picking up Ronan from his home and driving him to the hospital.

To prepare for the task, John checks the case notes to ensure he understands the client's condition and needs, the pick-up and drop-off points as well as the timeframes for the trip.

The case notes state that Ronan is 78 years old, weighs 120kg and requires a walking frame as he is restricted in his mobility. John decides to use the company vehicle as it has sufficient space and height to load and unload the client in the vehicle and store the walking frame in the boot.

John determines that the trip is approximately 12km from the pick-up location and the client's appointment is at 1.30pm. He uses his maps app in his phone to mark out the trip. The app estimates that the journey will take 20 minutes. John allows an additional 15 minutes for traffic and road conditions and plans to arrive at Ronan's house at 12.50pm.

This will allow enough time for John to greet Ronan, talk through the transport procedure, assist him to enter the vehicle and safely transport him to his appointment.



Selecting and checking equipment

Each transport task you complete may require specific equipment to ensure your own safety, as well as the comfort and safety of the client.

Each piece of equipment will need to be checked to ensure it is in good working condition and is suitable for the task.

The types of equipment that you may need to organise to safely relocate a client will vary based on the client's needs, the destination and the mode of transport. Along with mobility equipment, you may need to transport other auxiliary or portable equipment, such as oxygen tanks or IV stands.



Wheelchair

This mobility aid is used to assist clients who are unable to walk or stand unassisted due to illness, injury, weight or disability.

The client sits on the chair and is able to propel themselves manually by turning the wheels, or through the use of a motor.



Stretcher

This is used for moving injured or ill clients who cannot sit up, stand or walk unassisted, and therefore need to be placed in the supine position (lying down horizontally with their face up).

The stretcher is propelled by at least one person and must be lifted into and out of vehicles by two or more people. It usually has legs that can be collapsed to fit into a vehicle.



Trolley walker

This mobility aid is used to assist clients who are unable to walk unassisted due to illness, injury, weight or disability.

Many trolley walkers come with features such as castor wheels, a hand brake, a basket shelf for oxygen, a table pad for sitting and a forearm pad for resting in an upright position.

The client manoeuvres the trolley using their arms and legs.



Bed

Similar to a stretcher, the bed is used to transport clients who are injured, ill or otherwise unable to sit, stand and walk without assistance.

It is commonly used to relocate clients from one room or ward to another or from one building to another.



IV stand

This medical equipment is used to supply medicine or fluid to clients through a drip.

The equipment consists of a portable and adjustable pole with two to four hooks to enable bags of fluid to be securely hung and a wheeled base for stability and mobilisation. A hollow plastic tube is connected to the bag and into the veins of the patient to allow the administration of fluid.



Portable oxygen equipment

This equipment is used to administer additional oxygen to patients who have low blood oxygen levels or experience difficulties in breathing due to a respiratory illness.

A range of oxygen supply equipment is available, depending on the condition and needs of the client, including oxygen concentrators, oxygen cylinders and oxygen conserving devices.

Equipment inspection

Equipment must be thoroughly checked and prepared to ensure it is clean, safe and suitable for the task.

General tasks for preparing mobility equipment include checking the recommended load-bearing weight of the equipment to ensure it will safely support the person you are planning to carry. This information will be made available on a sticker on the equipment, or in the manufacturer's operating manual.

You may need to clean and sanitise equipment to remove any bodily fluids, stains, dust and bacteria using disposable wipes, gloves and approved cleaning chemicals.

Here are examples of the equipment checks to perform on each type of equipment.



Wheelchair

- ▶ Inspect wheels, seats, frames and handles for rust, cracks and splits.
- ▶ Ensure tyre pressure is within manufacturer's limits.
- ▶ Check that the wheelchair folds or collapses freely.
- ▶ Ensure wheels are free spinning and spokes are not loose or broken.
- ▶ Make sure footrests are adjustable.
- ▶ Ensure push handle grips are secure.



Stretcher

- ▶ Inspect the mattress, wheels, side rails and frame for general wear and tear.
- ▶ Ensure brakes are working correctly.
- ▶ Make sure electronic functions and levers are working correctly to their full range of motion.
- ▶ Check that tyre pressure is within manufacturer's limits.



Trolley walker

- ▶ Inspect support bars, wheels, seats, frames and handles for rust, cracks and splits.
- ▶ Check that tyre pressure is within manufacturer's limits.
- ▶ Check the equipment folds or collapses freely.
- ▶ Ensure brakes are working correctly.



Bed

- ▶ Inspect the mattress, wheels, side rails and frame for damage.
- ▶ Ensure tyre pressure is within manufacturer's limits.
- ▶ Check that brakes are working correctly.
- ▶ Ensure electronic functions and levers are working correctly.



IV stand

- ▶ Ensure attachments are securely fastened.
- ▶ Check that castor wheels allow the stand to move freely.
- ▶ Make sure poles allow for suitable adjustment of height.
- ▶ Ensure that poles and hooks are free from rust.



Portable oxygen equipment

- ▶ Make sure attachments are securely fastened.
- ▶ Check that castor wheels and other moving parts are moving freely without restriction.
- ▶ Ensure the apparatus type is suitable for the transport mode.

Damaged or broken equipment

Never attempt to use faulty equipment – this will reduce the chance of a safety incident occurring.

If you identify a hazard with mobility or other type of equipment that may cause harm to you or your client, you will need to perform the following steps to isolate the equipment. This may be the result of poor maintenance or misuse. If equipment is broken or damaged, it needs to be set aside so it cannot be used until it is repaired or replaced.

If you have identified any equipment that may be damaged, take the following steps:

1. Place the equipment away from the general work areas, such as a maintenance room or an office.
2. Place a chain, sign or lock around the equipment to tag out the item.
3. Record the problem in the maintenance logbook.
4. Report the problem to a supervisor.

Example

Checking mobility equipment

Mary works for Home Care Services as a support worker. She is preparing to assist her client Zoe to relocate her from her appointment with the podiatrist back to her home. Zoe is a paraplegic as a result of a bicycle accident that occurred some years ago and now uses a wheelchair to move around.

Mary is planning to use the wheelchair that is made available at the clinic to assist Zoe to move from the clinic to the company vehicle. The receptionist at the podiatrist office sees Mary about to inspect the wheelchair and tells her that they use that particular item on most days, and it should be okay.

Mary remembers her company policy on the safe transport of clients and decides to inspect the wheelchair to ensure it is safe to transport Zoe to the vehicle.

As part of the inspection process, Mary checks the tyre pressure and notices that one of the tyres is almost flat and the spokes are cracked on one side. Mary reports the issue to the receptionist and asks for another wheelchair to assist with relocating Zoe to the car.





Practice task 3

Question 1

Which of the following checks do you need to complete to prepare a company vehicle when transporting clients? Select all that apply.

- Check that the client can drive the vehicle safely.
- Ensure the vehicle is registered.
- Check that the vehicle is clean and tidy.
- Ensure the vehicle is less than five years old.
- Make sure there is sufficient fuel for the trip.

Question 2

Match each type of information on the left with the example on the right.

- | | |
|-----------------------------|---|
| * Travel information | * X-Rays and referral letters |
| * Personal information | * Client details |
| * Personal and health needs | * Wheelchairs, gait belts and support standards |
| * Mobility equipment | * Destination, travel path and scheduled arrival time |
| * Medical records | * Food, water and medicine requirements |

Question 3

Which of the following checks do you need to complete when preparing mobility equipment? Select all that apply.

- Check that the tyre pressure is within the manufacturer's limits.
- Check that the item is made in Australia.
- Ensure the person's weight is at or above the safe working limit of the equipment.
- Ensure the brakes are functioning correctly.
- Check that the rails, bedding and poles allow for suitable adjustment of height.

Question 4

Match each type of transportation equipment on the left with its description.

- | | |
|-----------------------------|---|
| * Stretcher | * Used to assist clients who are unable to walk unassisted due to illness, injury, weight or disability. The client manoeuvres the equipment using their arms and legs. |
| * Wheelchair | * Used to supply medicine or fluid to clients through a drip. |
| * Portable oxygen equipment | * Used to assist clients who are unable to walk or stand unassisted due to illness, injury, weight or disability. Some equipment has a motor to enable movement. |
| * Trolley walker | * Used to administer additional oxygen to patients who have low blood oxygen levels or experience difficulties in breathing due to respiratory illnesses. |
| * IV stand | * Used for moving injured or ill clients who cannot sit up, stand or walk unassisted, and need to be placed in the supine position. |

Question 5

Number the following steps from 1 to 4 in the order you need to follow to manage hazards relating to transport equipment.

Report the problem to a supervisor.

Place a chain or sign around the equipment to tag out the item.

Record the problem in the maintenance logbook.

Place the equipment away from the general work areas.



Summary

- ▶ Take the time to engage in meaningful conversations with key people to gather and give good information about the client's needs.
- ▶ Confirm the destination, travel route and the level of support that needs to be provided with the client to ensure the client arrives safely and on time.
- ▶ Consider your legal and ethical responsibilities under privacy, health and safety laws and human rights to ensure the rights of clients are upheld.
- ▶ Communicate the proposed transport procedure to the client and answer any questions.
- ▶ Plan the transport task by considering the destination, scheduled arrival time and travel route.
- ▶ Prepare equipment to ensure it is safe and has the correct capacity to safely transport the client to their designated location.
- ▶ Eliminate and report any safety hazards relating to mobility and other types of transport equipment.



Learning checkpoint 1

Prepare to transport clients

Part A

1. Which of the following are ways you should gather and provide information from the client and other personnel? Select all that apply.

- Listen to the client's verbal cues and tone of voice.
- Use positive body language when answering questions.
- Use lots of technical language so you appear professional and good at your job.
- Explain the procedure in a loud voice to ensure it is understood.
- Be brief when answering questions so you don't waste time.

2. Which of the following are legal and ethical considerations when transporting clients? Select all that apply.

- Avoid any foreseeable harm to the client and ensure they feel safe and comfortable.
- Ensure clients are free from discrimination and abuse.
- Transport clients in their own car, if requested
- Ask questions to ensure the support needs and preferences of the client are met.
- Ensure the vehicle and the proposed route is safe.

3. List **three** equipment checks that must be done to ensure transportation equipment is safe and functioning correctly.

Part B

Read the case study, then answer the questions that follow.

Case study

Oz Disability Care is an organisation that provides personal care services to clients living with a disability.

Huong is a support worker at Oz Disability Care. Today, he is required to pick up Michelle from her home residence, and transport her to a physiotherapy appointment. Michelle uses a trolley walker to assist her in walking and requires assistance when moving into and out of a vehicle. She lives with her mother, who is her primary carer.

Huong has booked the company SUV to collect and transport Michelle to her appointment.

1. Who should Huong speak to in order to confirm Michelle's transport requirements? Select all that apply.

- Michelle
- The receptionist at Oz Disability Care
- Michelle's mother
- The physiotherapist at the medical clinic

2. What information should Huong communicate to Michelle and her mother? Select all that apply.

- How Huong can assist Michelle into the car
- The safety and performance features of the car, such as its top speed and fuel economy
- The travel route, planned travel time and destination
- Methods for securing Michelle and her walker in the vehicle
- Huong's personal contact details so they can call him at any time for help

3. Which of the following are Huong's responsibilities for transporting Michelle to her appointment? Select yes or no for each one.

- | | | |
|---|-------|------|
| a. Assisting Michelle into and out of the vehicle | * Yes | * No |
| b. Stopping to purchase food for Michelle and her mother on the way home | * Yes | * No |
| c. Administering Michelle's medication | * Yes | * No |
| d. Confirming the location of Michelle's appointment | * Yes | * No |
| e. Checking the vehicle and equipment according to the safety procedure checklist | * Yes | * No |



Topic 2

In this topic you will learn about:

2A Transporting the client

2B Using equipment safely

Transport the client and equipment

The task of transporting a client from one location to another can be time-consuming and physically demanding.

You will need to consider your organisation's policy and procedures for client transport. Prioritise your own health and safety throughout the task, particularly when using manual-handling techniques to lift and manoeuvre clients and any equipment that needs to be moved.

2A Transporting the client

Ensure you are well-prepared for the task of transporting clients to their destination.

Review the proposed route to the destination in advance and estimate the time of arrival before starting your trip. Once you are clear on this information and the client is informed, you will be ready to begin transporting the client.

Transporting a client may involve transferring the person in-house from a bed to a wheelchair, from a bed to a stretcher, from a wheelchair to a bed, or assisting them into a vehicle to travel to an off-site location.



Points to consider when transferring clients

- ▶ Talk to your client throughout the task to check how they are feeling.
- ▶ Eliminate any distractions to ensure you and the client can concentrate on the task.
- ▶ Inspect the work area and the travel path, and remove all hazards and obstacles that might present a health and safety risk or hold up the process.
- ▶ Use the manual-handling equipment and other aids where possible to reduce the need for manual lifting, such as support bars and linen.
- ▶ Ask a colleague for help if you need to lift a person, such as moving them from a bed to a wheelchair.
- ▶ Double-check the person is secured in the vehicle.

Policies and procedures for the safe transport of clients

Refer to your organisation's policies and procedures to identify your responsibilities in carrying out the task safely.

The policy will explain your role and responsibilities when transporting clients. The procedures will include the steps for:

- ▶ identifying and eliminating hazards, such as checking equipment before it is used
- ▶ infection control procedures, such as washing hands and cleaning equipment
- ▶ communicating with clients
- ▶ safe manual-handling processes
- ▶ techniques for loading and securing clients in vehicles
- ▶ client safety and reporting requirements.

By following your organisational policies and procedures, you will be working within your scope of practice and protecting the rights of the client. By following workplace policies, you will also ensure your own health and safety, by minimising hazards and risks.

Following manual-handling procedures

You are likely to have access to a range of equipment to make the task of transporting clients safer and more efficient.

Manual handling of clients is a high-risk task that can cause physical injury. Using the right equipment for the task will eliminate or reduce the need to manually lift and manoeuvre clients.

Your supervisor will arrange training on how to move a client correctly using the correct techniques. The technique will vary between organisations and according to the specific requirements of the client.

Steps for safely lifting and moving clients

1. Plan the move

Make sure you know where you are going and how far you are taking the client. Remove obstacles and clear the pathway to the destination. Check the weight of the person to ensure they are safe to lift. In most cases, clients who are overweight or obese (body mass index of 25+) will require a team lift or mechanical equipment to move them.

2. Check equipment suitability

Check for weight limits on lifting equipment or how much you are allowed to lift. Ask your supervisor if you are unsure. Examples include a support bar, gait belt, trolley or other specialised lifting equipment.

3. Set your body position and posture

Stay close to the person at all times, bend your knees and keep your spine in its neutral 'S' curve shape. Brace your core muscles to lock your spine in a strong position. Stand with both feet flat on the ground.

4. Lift the person safely

Keep your back in its neutral 'S' curve position and never round your spine. Keep your feet flat on the ground and keep the person close to your body at all times. Make sure you are using the equipment as it is intended to complete the task.

You can read more about safe handling of patients at: <http://aspirelr.link/safe-patient-handling>.

Transferring a client from a bed to a wheelchair

Transferring a client from a bed to a wheelchair can be a difficult and hazardous task if not done correctly.

It requires planning, skill and the correct use of equipment to carry out the job safely.

Here is an example of a procedure for lifting a client who is lying on their back:

1. Use the bed sheet to shift the client close to the edge of the bed.
2. Bend the knees of the client to assist them in getting ready to sit up.
3. Place one of the client's arms over their chest to turn them onto their side, facing the wheelchair.

4. Ask the client to use their hands to push themselves up as you gently pull their knees off the bed and assist them into a seated position.
5. Use the manual-handling equipment and other aids where possible to reduce the need for manual lifting, such as a gait belt or support bar.
6. Keep the client close to you and use small steps to rotate them to the wheelchair.

You may need to ask a colleague for help if you need to lift a person.

Transferring a client from a wheelchair to a vehicle

Transferring clients from a wheelchair to a vehicle requires a number of key steps to be performed to ensure the safety of you and the client.

Here is an example of a procedure for lifting a client from a wheelchair into a vehicle:

1. Explain to the client the procedure you are going to follow and check for understanding.
2. Position the client in their wheelchair behind the passenger door that you are planning to use to transport the client and open the door.
3. Lock the wheelchair brake.
4. Adjust or move the footrests on the wheelchair.
5. Assist the client to move out of the chair using a support bar, a team lift or a safe lifting technique.



To perform a safe lift, take the following steps:

- ▶ Stand close to the client with both legs either side of the client's thighs.
- ▶ Place your hands under the client's shoulders.
- ▶ Keep your back in its neutral position and stand up with the client, using both your feet.
- ▶ Take small steps backward toward the open door.
- ▶ Gently lower the person into the seat and bend your knees, keeping your back in its neutral position.
- ▶ Swing the client's legs into the seat and support their back.
- ▶ Buckle in the seat belt and check that the client is secure in the seat.
- ▶ Gently close the door for the client.
- ▶ Fold and stow away the wheelchair in the boot of the vehicle and tie down the wheelchair to prevent movement while in transit.

Infection control policies and procedures

Some clients will be unwell, which can put you at risk of contracting and spreading their illness.

Transporting clients requires you to be in close physical contact with them.

One of the simplest but most effective ways of preventing the spread of infection is to maintain a high standard of personal hygiene. Handwashing and using personal protective equipment (PPE) are the most important controls to reduce the likelihood of the spread of infection.

Your organisation will have policies and procedures in place to make sure all staff understand the required PPE standards and how to carry out handwashing correctly. It will be your job to make sure you know what you need to wear, when to wash your hands and how handwashing procedures should be carried out. If you are unsure about the requirements or whether you are doing the right thing, speak with your supervisor.

Precaution	Explanation	Example
Standard precautions	These are basic work practices recommended for use with all clients to give the minimum level of protection for everyone (clients, staff and others). These include work practices that achieve a basic level of infection control, based on the idea that all blood and bodily fluids are potentially infectious. These precautions apply to the care and treatment of all clients regardless of their perceived infectious risk.	<ul style="list-style-type: none"> ▶ Handwashing ▶ Immunisation of workers ▶ Routine environmental and equipment cleaning and sanitising ▶ PPE, such as gloves, apron and face mask
Additional precautions	These precautions are used in addition to standard precautions when extra barriers are required to prevent or interrupt the transmission of specific diseases. These strategies are intended to prevent the spread of infection to others from clients known or suspected to be infected that would not be contained by standard precautions alone.	<ul style="list-style-type: none"> ▶ Infectious client is isolated, preventing transmission of the infectious agent to susceptible people ▶ Appropriate signage is in place to alert staff and visitors that they are entering an isolation area and personal protective equipment, such as a mask, is required to be worn

The following is an example of a handwashing procedure, produced by NSW Health.



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Example

Transporting a client

Jess has been in hospital for over a week after a complicated delivery of her child. Jess is keen to leave the hospital and get home to her other children. Kieran is a volunteer at the hospital and is making arrangements to collect a baby capsule for Jess's new baby so he can transport them both home when Jess is discharged in the afternoon.

Kieran has received training from the hospital for transporting patients with babies and young children, including fitting the baby capsule. He collects the hospital car from the yard.

In the afternoon, Kieran collects the paperwork with the destination details from the office and goes to the ward to collect Jess and her baby. He introduces himself and escorts Jess in her wheelchair while a nurse carries the baby in the capsule. The nurse places the baby capsule into the car and Kieran assists Jess to get out of the wheelchair and into the back seat.

The baby is asleep when they arrive at Jess's house and Jess's family comes to meet the vehicle and help Jess and her baby into the house.





Practice task 4

Read the case study, then answer the questions that follow.

Case study

Geoff has just started working at Quality Aged Care Services.

Today Geoff is required to pick up and drive Sharon, an elderly client, from her home to a facility 35 minutes away. Sharon uses a wheelchair to move around.

Geoff didn't read the case notes before arriving at Sharon's home. Once he arrives, he greets Sharon and begins asking her where she needs to go and when she needs to arrive. They both quickly realise they won't make the appointment on time, which causes Sharon to become anxious.

Geoff moves Sharon's chair quickly to the van and forgets to ask about any specific needs she may have for the trip. The vehicle Geoff uses has an additional space so Sharon can stay in her chair for the trip. Because he is nervous and in a hurry, Geoff drives erratically by swerving around traffic and driving too fast over speed humps. Sharon is feeling unsafe and is becoming agitated at the way Geoff is conducting himself.

Question 1

What is the outcome of Geoff failing to follow the organisation's policies for transporting Sharon to her appointment? Select all that apply.

- Geoff has not complied with his duty of care by asking about Sharon's support needs.
- Geoff will get sick because he didn't wash his hands.
- Geoff has done his best to make sure the trip is completed as safely and efficiently as possible.
- Geoff has put Sharon's comfort and safety at risk.

Question 2

If Geoff needed to lift Sharon out of her wheelchair and into the vehicle, what order should he follow to ensure the correct manual-handling procedure?

- Check equipment suitability.
- Lift the person safely.
- Plan the move.
- Set his body position and posture.

2B Using equipment safely

Client mobility and medical equipment requires the use of safe handling and storage practices during the transport process.

Ensure your personal safety and the safety and comfort of the client. You can do this by continuously checking with the client to determine their comfort level and making adjustments as required.

At times medical and transport equipment may need to be transported in a vehicle. You need to use safe manual-handling techniques to lift and manipulate equipment into and out of vehicles. This includes wheelchairs, trolleys and personal belongings the client wants to bring with them. Here are examples of general procedures for manoeuvring equipment to avoid unnecessary damage or harm.



Wheelchairs

- ▶ Remove any personal belongings from the storage compartment.
- ▶ Collapse the wheelchair and gently place it in the boot or other designated storage area.
- ▶ Use straps to secure the wheelchair to avoid unnecessary movement during transit.



Stretchers and beds

- ▶ Remove any attachments and items that protrude off the edge of the equipment.
- ▶ Ensure safety rails are up.
- ▶ Collapse the legs of the stretcher or bed and use a team lift to place it in the rear of the vehicle.
- ▶ Use brakes to lock the wheels in place and avoid unnecessary movement during transit.
- ▶ Secure the equipment in the vehicle using straps or locks.



Trolley walkers

- ▶ Remove any personal belongings from the storage compartment.
- ▶ Collapse the trolley walker and gently place it in the boot or other designated storage area.
- ▶ Use straps to secure the trolley walker in the boot to avoid unnecessary movement during transit.



IV stands

- ▶ Remove the medical equipment from the hooks safely and place it on a smaller transportable table, or ask the client or team member to hold the items.
- ▶ Unscrew the adjustable knob and lower the pole – some models will allow you to dismantle the stand.
- ▶ Gently place the stand in the boot or other designated storage area.
- ▶ Use straps to secure the stand to avoid unnecessary movement.



Portable oxygen equipment

- ▶ Keep the oxygen apparatus upright at all times.
- ▶ Place the equipment in the boot or secure the apparatus in the back seat using a seat belt.
- ▶ Strap the apparatus down to secure oxygen.

Using a ramp to load a client into a vehicle

Organisations may provide specialised client transit vehicles to assist in transporting clients who are wheelchair-dependent.

These vehicles usually have an automated loading ramp at the side or rear and additional space for the client to stay seated in their wheelchair for the trip.

Before attempting to load a client into a vehicle, you will need to check the load rated capacity of the ramp and the vehicle, and confirm the dimensions of the passenger cab. This information will be printed on the driver's manual as well as on the ramp, in the form of a compliance or data plate.



The next step is to ensure the combined weight and dimensions of the client in their wheelchair. You may be required to weigh and measure the person and check the label on the wheelchair to confirm its total mass. If the client has up-to-date medical records, their weight can be found in these documents.

Steps to load and secure a client into a vehicle using a ramp

1. Explain the procedure you are going to follow to load and secure client and check for understanding.
2. Position the client in their wheelchair behind the access door and have the correct door open.
3. Follow the manufacturer's instructions to activate the loading ramp and bring it to ground level.
4. Move the client onto the ramp and have the client hold onto the safety bars or straps.
5. Lock the wheelchair brake and apply the guards on the ramp.
6. Raise the lift according to the manufacturer's instructions.
7. Deactivate the wheelchair's brakes and move the client into the passenger cab.
8. Apply the brakes of the wheelchair.
9. Secure the wheelchair using the floor straps provided, according to the manufacturer's instructions and double-check the tension and connections of the straps.
10. Secure the seatbelt for the client.
11. Secure the ramp and close the door.



Practice task 5

Question 1

Match each type of equipment to the safe equipment transport procedure.

- | | |
|--------------------------------|---|
| * Trolley walker or wheelchair | * Keep the apparatus upright at all times and use a strap to secure the equipment in the vehicle. |
| * Portable oxygen equipment | * Remove medical equipment from the hooks safely and place it on a smaller transportable table, or ask the client or team member to hold the items. |
| * IV stand | * Collapse the legs and use a team lift to place it in the rear of the vehicle. Apply the brakes once inside the vehicle to prevent movement. |
| * Bed or stretcher | * Remove any personal belongings from the undercarriage and collapse the equipment, before stowing away in the boot of the vehicle. |



Summary

- ▶ Confirm client transport requirements, including the destination, the equipment needed, timeframes, special client needs, and reporting and administration requirements.
- ▶ Follow your workplace policy to ensure your own health and safety by minimising hazards and risks in the process of transporting clients.
- ▶ Always use safe lifting practices to lift and move clients, such as lifting aids and equipment.
- ▶ Remove all hazards and obstacles when manually lifting and moving clients and their equipment.
- ▶ Apply infection control practices to minimise the risk of contracting and spreading an infectious disease.



Learning checkpoint 2

Transport the client and equipment

Part A

1. Identify **three** things you must consider when assisting a client in their travel to an off-site location.

2. Which of the following statements relate to the correct transportation of equipment? Select all that apply.
 - Use straps to secure the trolley walker to avoid unnecessary movement during transit.
 - Ask the client or team member to hold onto the IV stand or drip.
 - Lay the oxygen cylinder on the back seat or in the boot of the vehicle.
 - Remove personal belongings from the storage compartment of the wheelchair before it is collapsed for travel.
 - Use the brakes to lock the wheels of the bed or stretcher to avoid unnecessary movement during transit.

Part B

Read the case study and answer the questions that follow.

Case study

West Side Care is a small family-owned business that specialises in providing personal care services to elderly clients who are in independent living arrangements.

Jenny is an experienced aged care support worker at West Side Care. Today, she has the task of transporting an elderly client named Rodger from his place of residence to his quarterly health appointment at the local GP. Rodger uses a powered wheelchair to complete his daily tasks. He is competent navigating around his home unassisted. However, he prefers to stay in his wheelchair when travelling.

Jenny is using the company client transit van, which has an automated rear access ramp to load and unload Rodger without him having to exit his wheelchair. The passenger cab has adjustable seatbelts for the client and strap locks to secure the wheelchair during transit.

1. What requirements must Jenny follow when loading Rodger and his wheelchair and transporting him to his appointment? Select all that apply.

- Position Rodger in his wheelchair behind the access door and have the door open ready to load him onto the ramp.
- Follow the manufacturer's instructions to activate the loading ramp and secure the straps to the wheelchair.
- Once in the van, deactivate the brakes of Rodger's wheelchair.
- Ask Rodger to secure his seatbelt himself so as not to invade his personal space.

2. Give **three** examples of policies and procedures at West Side Care that can help to minimise the risk of harm to Jenny when securing and transporting clients like Rodger.



Topic 3

In this topic you will learn about:

- 3A Delivering the client and informing relevant personnel**

- 3B Returning transport equipment**

- 3C Completing reporting requirements**

Deliver the client

Once a client has been transported to their destination, you will need to follow a handover process to deliver the client to a carer, family member or organisational staff.

This is an important part of the quality service process and ensures the client is cared for once the transport task is complete.

As part of your workplace policies and procedures, you will need to return any equipment used in the transportation process and finalise your reporting requirements to confirm the task is completed.

3A Delivering the client and informing relevant personnel

When you arrive at the client's designated location, you will be required to meet with a key contact and hand over the client to a person who is responsible for supporting their needs.

Key personnel in a handover process can be:

- ▶ the client who has been transported
- ▶ family members and/or primary carers of the client
- ▶ organisational staff, such as a receptionist, nurse, doctors or other health professional working at a hospital, care facility or allied health practice.

In the handover process, you will need to communicate a range of important information to the person who is taking responsibility for the client, including the following.

Purpose of the visit

This is the main reason the client has been delivered to the destination, including who the client is there to visit.

Personal information

This includes the client's full name, date of birth, home address and contact details.

Medical information

This is the client's medical records, health information and personal injuries, illnesses or conditions.

Unique client needs

This includes special comfort requirements, food and hydration needs, and preferences as to how the client would like to be assisted.

Reporting client issues

While transporting a client, you may encounter issues that need to be reported when you arrive at the destination.

The information you provide is necessary for the continuing care of the client. For example, you may notice that the client becomes unwell on the journey or the client may share personal information with you that indicates they may be experiencing abuse or neglect. You have a duty of care to communicate this information to the appropriate health professional.

In addition, you may observe a significant change in behaviour that needs to be reported. Some client behaviours are of concern because they may cause harm. These include behaviours that make you or others feel uncomfortable, threatened or unsafe.

Behaviours of concern include:

- ▶ physical violence to another person
- ▶ self-harm
- ▶ refusing to follow a reasonable instruction
- ▶ abusive and offensive language
- ▶ intentional damage to property
- ▶ verbal remarks directed toward the safety of others
- ▶ sexually suggestive comments
- ▶ theft of money or property.

In many cases, these behaviours are a form of communication that the client is using to convey an emotion, such as anger, fear or confusion. There may also be drugs, alcohol or a disability or mental health issue contributing to the concerning behaviour. Privacy and respect for the client needs to be maintained at all times.

Always seek advice and assistance from a health professional or your supervisor on how you should respond to clients who demonstrate behaviours of concern. It is important to protect your own health and safety first and foremost. Follow your policies and procedures to ensure you respond in a safe and appropriate manner that meets your duty of care obligations.

Relevant policies and procedures may include:

- ▶ Operational guidelines for handling incidents and/or cases involving behaviours of concern
- ▶ Staff debriefing following an incident
- ▶ Incident reporting and documentation

Effective workplace communication

When engaging with people as part of the client handover process, you need to communicate effectively.

Communicating does not just mean speaking to someone. Effective communication occurs when the true meaning of your message reaches the receiver. It requires the use of a range of controlled verbal and non-verbal cues to ensure the intended content of your message reaches the receiver.

Effective communication also requires an understanding of the information that you need to provide and how to deliver the message in a way that the other person can understand.

Example

The client handover process

Jacinta works as a disability care worker for Advanced Care Professionals. She is delivering her client Paul to the drop-off point where a bus will be taking a group on an outing to the zoo.

When they arrive, Jacinta escorts Paul into the facility and introduces herself to the group leader. Jacinta introduces Paul and hands over a folder with Paul's personal information, emergency contact details and medication. Jacinta takes special care to explain that Paul needs to take his medication with each meal.



Practice task 6

Question 1

Which of the following align with principles of an effective client handover? Select all that apply.

- Express any issues you have about concerning behaviours while the client is present.
- Greet the key contact at the destination.
- Clearly communicate the key details about the client, including their name and reason for their visit.
- Provide relevant documents about the client's support needs.

Question 2

List **three** people that you may need to communicate with as part of the client handover process.

Question 3

Which of the following behaviours would you need to report to a health professional? Select all that apply.

- Sexually suggestive comments made about workers
- A past incident that has made the client sad
- Abusive and offensive language
- Verbal remarks directed toward the safety of others
- Comments about their personal hobbies and interests

3B Returning transport equipment

Once the client has been successfully delivered to their destination, you will need to return all equipment.

This can include beds, stretchers, wheelchairs and walkers, as well as medicinal equipment used to transport the client.

By placing the items back in their correct storage spaces, you will help to ensure other staff can access and use the equipment when they need it, without any unnecessary delays.

Checking equipment for damage

It is good practice to check equipment for any damage on its return.

Checks include inspecting the wheels, frames, adjustable devices and safety functions for any wear and tear or general damage.

If you observe any issues, follow your workplace procedures to report the matter to a supervisor and isolate the equipment so other staff cannot use it.

You may also be required to:

- ▶ place a sign or chain around the equipment
- ▶ place the faulty equipment in a maintenance bay or in the manager's office.

Cleaning and sanitising equipment

As part of your final inspection, check the equipment for its cleanliness and general tidiness.

This includes checking equipment for:

- ▶ bodily fluids
- ▶ stains that have come from human contact
- ▶ skin and hair
- ▶ food or liquid.

Take the time to clean and sanitise the item to remove anything that may cause an infection to other users.

All equipment must be cleaned, and some equipment also needs to be sanitised. Health services have strict policies and procedures that must be followed. Cleaning simply means removing visible waste, debris, dirt and dust. Just because a surface is clean does not mean that it is sterile.

Cleaning can be done manually by washing an item by hand or using specialised cleaning equipment. Sanitising is when heat or chemicals are applied to a surface or substance to destroy bacteria and pathogens.

Equipment is safe when all microbes have been removed.

Always use the required PPE when cleaning and sanitising equipment to ensure you do not contract or spread any infectious diseases. The following PPE may need to be worn during this task.



Disposable gloves

Gloves are recommended when coming in contact with bacteria, blood, bodily substances and secretions from people, animals (such as guide dogs) or vermin.

Gloves must be changed between clients, and when using portable equipment. They must be disposed of by turning them inside out and placing them in a lined rubbish bin.

Handwashing is still required before and after using gloves.



Gowns or aprons

Gowns and waterproof aprons act as barriers between workers and sources of contamination. These must be worn if there is a possibility of splatter or contamination on clothes or skin, or if there is a known presence of pathogens.

Example

Stow away mobility equipment

Meninda works as a mental health support worker for Life Services. One of her main roles is to assist clients in moving from their beds and transporting them around the facility for appointments, meal times and social events.

Meninda will often use trolley walkers, wheelchairs or portable stretchers, depending on the task and the condition of the client.

Meninda has just finished transferring a client from his room to the dining area for dinner using a wheelchair. Once the client has finished his meal, Meninda is required to transfer the client back to his bed.

Meninda then takes the wheelchair back to the storage area and wipes it down with the cleaning equipment kept there. She then neatly parks the wheelchair according to organisational procedures so the other staff are able to access and use the equipment when needed.



Practice task 7

Question 1

What procedures do you need to follow to clean and sanitise equipment after its use? Select all that apply.

- Wear the required PPE, including disposable gloves and an apron.
- Use approved cleaners and sanitisers in line with the manufacturer's instructions.
- Use the same gloves every time you clean equipment.
- Dispose of gloves and cleaning materials using the correct bins and wash your hands thoroughly.
- Dispose of any mobility equipment once cleaned.

Question 2

Why is it important to inspect all equipment after it has been used and return it to its correct storage area?



3C Completing reporting requirements

Good documentation and record-keeping practices ensure there is sufficient evidence of a task being completed in compliance with legislation.

Relevant legislation includes health and safety legislation and privacy laws.

Reasons to document client information
▶ Staff and others in the team can see what action was taken from one client interaction to the next.
▶ Supervisors and other senior staff can monitor the client's progress.
▶ If workers are absent or unavailable, others can read the document and provide continuity of care for the client.
▶ To ensure files meet professional standards and maintain the reputation of the organisation.
▶ To ensure auditing and legal requirements are met.
▶ A history of care can be used to reflect on the strategies and actions that did and did not work.
▶ Issues can be followed up without unnecessary delays.

Record-keeping

Records and documentation must reflect the policies and procedures of the organisation.

Each workplace will manage information in their own unique way and have standards for note-keeping, storage and security of personal and sensitive information.

Records of client transport tasks must be completed on time and stored correctly so they can be easily located and referred to when required.

In many cases, you will need to document the following details about the client transport task:

- ▶ date and time of the task
- ▶ pick-up and destination points
- ▶ safety incidents or hazards
- ▶ person you have delivered the client to
- ▶ concerning behaviours or indicators of abuse or neglect.



Privacy and confidentiality

All personal information should be kept in an area that is not accessible to individuals and members of the public.

Most organisations use electronic record-keeping systems that allow workers to input information directly into a database. These systems may be password-protected, which limits access to authorised staff and protects the privacy of the person accessing the service.

Some organisations rely on paper-based records, such as hard-copy forms that are updated during and after any tasks have been completed. These documents should always be kept in safe and secure locations according to the organisational procedures, such as a locked filing cabinet.

Reporting incidents

All incidents that occur during the client transport task must be reported.

This includes incidents that result in injury to someone or damage to equipment and near misses (incidents that did not result in harm or damage, but had the potential to do so).

If an injury requires first aid or medical treatment, only a staff member who has completed the necessary first-aid training can carry it out.

If an incident occurs while you are present, you may be required to complete an incident report form.

Your supervisor will need to keep a record of any incidents that occur before, during and after transporting the client to their designated location. The relevant health and safety representative will analyse the information provided in incident reports. This analysis is important to identify ways to reduce or eliminate risks in the future.

Here is an example of an incident report form.

Incident report	
Name of any injured person	
Date injury occurred	
Time injury occurred	
Circumstances that led to the injury	
Any medical personnel contacted – record details and discussion	
Details of any medication administered (complete a medication record) and/or first aid provided	
Details of any witnesses to the injury	

Complete the following section if an emergency contact was involved.		
Name of person who made or attempted to make contact with an emergency service	Date and time of notification attempts or contacts	When was the emergency contact reached?
Date entry was completed		
Time entry was completed		
Name of person completing the entry		
Signature of the person completing the entry		

Writing client notes

Every person receiving community services support will have a file about their support needs.

This includes people receiving support from aged care, health, community support or a disability services agency.

They may be handwritten or electronically recorded. In both cases, they must be stored and filed accurately and securely.

Guidelines for writing client notes

- ▶ Only report the facts – Be objective; don't include opinions or assumptions.
- ▶ Be precise – All workers struggle with a busy workload and so don't have a lot of time for note writing. You will save time if you can be concise and only report relevant information that is essential to the task that has been completed.
- ▶ Be clear – Other people will be reading your notes perhaps months or years after you have written them. Be aware of the information needs of these readers and use plain English that is easily understood.
- ▶ Be timely – Write your notes as soon as possible; with a busy workload it is easy to forget the details of service delivery with one person as you move on to another. If you leave note writing to the following day, you may forget to include relevant information.
- ▶ Ensure notes are complete – Notes should be concise, but should include all relevant information. By omitting relevant information, you may be diminishing the quality of care provided to people because decisions could not be made effectively.
- ▶ Try to write as neatly as possible, keeping in mind other people will need to understand what you have written.
- ▶ Avoid uncommon abbreviations – You will be informed by your supervisor what are approved abbreviations or acronyms to use in note-writing. Don't use your own versions as other people won't be able to understand them.

- ▶ Where possible, use correct spelling and grammar. Your note-writing is a reflection of your work practice and so should be professional. Refer to a dictionary if necessary.
- ▶ Document all relevant interactions with clients, carers, family members and organisational staff.
- ▶ Never record disrespectful, judgmental or incriminating information or comments about the client. Other people will have access to these files, including the person, their family and carers. These records may also be used as evidence in court, so seek guidance from your supervisor.

Example

Completing client case notes

Sam is a community support worker for MyCare. She has just completed a job that involved picking up an elderly client, Rommel, from his home and taking him to an appointment at a specialist clinic. Rommel has several health issues, including that he is obese and has difficulty walking.



Sam found it difficult to get Rommel in and out of the car and now needs to complete the case notes for the job before she can move on to the next task.

MyCare uses an online record-keeping system, which Sam is able to access from her tablet. Sam records the date, times, mode of transport and purpose of the transport task. She documents the travel journey and the estimated time taken to transport the client to the clinic.

Sam notes that Rommel’s condition made it difficult for him to fit into the car. She recommends that they use the larger van as this would make the trip more comfortable for Rommel and make the task easier for the worker. Sam saves the report according to her workplace procedures.



Practice task 8

Question 1

Which of the following information needs to be reported? Select all that apply.

- Information about incidents that have occurred
- The date and time the transport task was completed
- The safety and performance features of the equipment and the vehicle used
- Pick-up and destination points
- Details of all conversations had with the client

Question 2

Which of the following statements relate to writing and recording information about clients? Select yes or no for each one.

- | | | |
|--|-------|------|
| a. Client notes should always be stored in a safe and secure location. | * Yes | * No |
| b. Passwords for record-keeping systems may be shared with the client's friends or family members. | * Yes | * No |
| c. Only report the facts; don't include opinions or assumptions. | * Yes | * No |
| d. Every interaction with the client should be documented. | * Yes | * No |
| e. Notes and records about the transport of a client should be completed as soon as possible. | * Yes | * No |



Summary

- ▶ Follow a thorough handover process to deliver the client to their carer, family or organisational staff as part of the organisation's quality service standards.
- ▶ Inform key people at the designated location about the client's needs and the purpose of their visit to ensure they understand their responsibilities in caring for the client.
- ▶ Use effective communication skills to inform others of the key information about the client.
- ▶ Return all equipment used to its rightful location to ensure other staff can locate the equipment when needed.
- ▶ Check equipment for damage, and clean and sanitise it to remove contaminants.
- ▶ Complete the workplace reporting requirements to the required policy standards to maintain a record of the client transport task.
- ▶ Complete records in a timely manner and store records according to workplace requirements.



Learning checkpoint 3

Deliver the client

Read the case study, then answer the questions that follow.

Case study

Juan is a support worker at Elderly ProCare, an organisation that provides personal care services to elderly clients in aged care residences, as well as independent living arrangements. He has just completed the task of transporting Bert from his aged care residence to his appointment at the local hospital to check his medication for his asthma and update his medication plan.

During the trip, Bert began wheezing and Juan was required to administer his asthma medication, in line with Bert's medical management plan. This relieved Bert's symptoms temporarily. However, he was still having problems breathing for the remainder of the trip.

Juan unloads Bert from the van and escorts him to the main reception area of the hospital.

1. What types of information does Juan need to explain to the hospital staff as part of the handover process? Select all that apply.

- His name and the organisation that he works for
- A list of the other trips Juan has made to the hospital this week
- Bert's full name and contact details
- The purpose of Bert's visit
- A summary of the incident regarding the asthma attack, including the actions taken by Juan

2. Identify **two** things Juan can do to ensure the privacy and confidentiality of Bert's personal information.

3. What procedures does Juan need to follow when returning the equipment used to deliver Bert? Select all that apply.

- Inspect the equipment for any damage.
- Leave the equipment with the client at the drop-off point.
- Test the equipment to ensure all functions are working correctly.
- Clean and sanitise the equipment to remove bodily fluids, stains and contaminants.