

Passenger Care During Loading & Unloading

Instructor Notes:

- Display welcome slide as participants enter the room to reassure they are in the correct place.
- Be sure to welcome participants to class – introduce class members and all trainers present.
- Be sure to start on time.

Discussion Points:

- Remember, enthusiasm and positive energy are critical.
- Class participants are embarking on a challenging journey which begins here.
- For some, this may be the first time in a classroom in a very long time, making them feel slightly intimidated. Be sure to make participants feel welcome.
- Review emergency exit locations and facility specific policies, including cell phones and smoking.

Time Recommended: 1.0 hour

SECTION OVERVIEW

- As professional Operators we do more than operate a vehicle; we care for passengers
- Sometimes transporting a passenger may involve a mobility aid or device
- Adequate securement of these aids and devices requires an operator to use proper body mechanics in the process to avoid injury
- This section focuses on skills required by the operator to safely assist and transport passengers with mobility aids and devices

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Instructor Notes:

- Discuss the importance of passenger assistance.
- Providing passenger assistance is one of the most important aspects of our jobs.
- Our assistance begins when we approach the passenger location and doesn't end until we leave the destination.

Discussion Points:

- **Ask participants:** *Why do you think we provide passenger assistance?*
- Explain to participants: As professional operators, we are passenger care specialists. Our passengers depend on us to get them to their destinations safely. They rely on us from the moment we arrive at the pick up location until the moment we drop them at their destination.
- **Ask participants:** *How do you think we assist our passengers?*
- Explain to participants: As professional Operators, we do more than operate a vehicle. We provide the appropriate level of service and care to the passengers we transport.

Note: This section focuses on skills required by the operator to safely assist passengers.

Objectives

By the end of this section, participants will know and understand:

- Proper procedure for approaching a passenger location
- Body mechanic techniques that will protect you when working with passengers with mobility aids
- Safety factors during loading and unloading
- How to minimize risk when leaving a passenger location

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Instructor Notes:

- Briefly cover the objectives on the slide and move on

Discussion Points:

- None

PLANNING AHEAD

Review manifest

- Before leaving yard
- Before leaving each stop

Assisting passengers on/off vehicle

- Offer assistance to passengers
- Get confirmation passenger heard you



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Instructor Notes:

- Emphasize the importance of planning ahead.

Discussion Points:

- Planning ahead for your stops is part of providing assistance to our passengers.
- Review your manifest prior to leaving the yard each day:
 - Specifically look at the information for the first passenger you will be picking up for the day.
 - What type of mobility aid, if any, will the passenger be bringing?
 - Are there additional riders (Personal Care Attendant (PCA), Guest, Child, Service Animal, etc.) listed on the manifest?
- Upon arrival at a passenger location (pick up/drop off), plan to get out of your seat to assist your passenger.
- This may mean deploying the lift/ramp, assisting passengers up/down the vehicle stairs, and/or walking them to/from the door.
- If you arrive at a pick up location and the passenger is already waiting outside, once the vehicle is stopped and secured, open the door and ask your passenger if they would like assistance.
- Get confirmation from the passenger that he/she heard and understood you.
- **Ask participants:** *How would you do that?*
- After loading your passenger(s) and making sure they are safely secured inside the vehicle, review your manifest to plan for your next pick up/drop off.

- **Do not allow Dispatch, your schedule, or your passengers to rush you or dictate your plan**

ORIGIN TO DESTINATION SERVICE

Curb to Curb

- Additional assistance

Door to Door

- Unattended passengers
- Vehicle keys
- Multi-story buildings
- Commercial buildings

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Instructor Notes:

- The Americans with Disabilities Act requires paratransit service to be origin to destination.
- Each individual transit agency determines which type of service (Curb-to-Curb or Door-to-Door) will be provided in their paratransit plan.

Discussion Points:

Explain to participants the specific type of service provided at your location based on local and contractual requirements:

If providing curb-to-curb service, be sure to include the following points in your discussion:

- What we do when a passenger asks for additional assistance to the door.

If providing door to door service, be sure to include the following points in your discussion:

- Can passengers on the vehicle be left alone so you can perform door to door service?
- Should operators take the vehicle keys when they perform door to door service?
- What should they do in the case of multiple story buildings? Do they walk passengers to the bottom of the stairs? Do they go inside the building?
- What should they do in the case of commercial buildings? Do they enter the buildings?

Approaching a Passenger Location

- Risk assess
- SCAN for hazards



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Instructor Notes:

- Just as pilots prepare for their approach to the runway to land the plane, we, as operators, should also prepare for our approach to the passenger location.

Discussion Points:

When approaching the passenger location, we should begin thinking about the following:

- Risk assess by finding a safe location to park the vehicle, deploy the ramp/lift and pick up the passenger.
 - *What is a safe location?*
 - A safe location is one that is away from any potential hazards that may result in an accident or injury. This would include water puddles, cracks in the concrete, uneven surfaces, etc.
 - A safe location has enough space to deploy the lift/ramp for the safest path of travel for the passenger.
 - For vehicles equipped with more than one length for ramp deployment, use the ramp length that has the least amount of slope and/or reduces hazards. Less slope = easier to maneuver mobility devices (and people) up and down the ramp.

More Than Driving

- Safety responsibility
- Ensure passenger safety
- Follow all rules and procedures
- No room for creativity



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Instructor Notes:

- As providers of transportation services to individuals utilizing mobility devices, it is our responsibility to make sure that all necessary steps are taken to ensure passenger safety.

Discussion Points:

- From a vehicle operator's perspective, this means following all rules and procedures pertaining to mobility device securement.
- There is no room for creativity when it comes to maneuvering and transporting mobility devices.
- Our passengers depend on us to get them to their destinations safely. This includes mobility device securement.

At the Passenger Location

- Park on and as close to address side as possible
- Review manifest for relevant passenger information
- Plan for your passengers' seating needs/arrangements
- Ensure ramp/lift can be safely deployed

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Instructor Notes:

- None

Discussion Points:

- Park as close to the address, on the “address side” to eliminate the risk of having to walk/assist or have a passenger cross the street.
 - Park parallel to the curb and close enough so the passenger can step directly onto the vehicle or the ramp from the curb
 - Double park only if you see your passenger and you believe you can pick them up immediately. This is done only if it will not create any type of safety hazard, such as areas where traffic is heavy traffic or moving at a high rate of speed.
- Check your manifest for relevant passenger information.
 - Relevant information is passenger name, type of mobility aid, whether they have a PCA, service animal, friend (companion) riding with them and any notes on the manifest pertinent to the location.
- Loading order – Determine where this passenger will be located or sit on the vehicle in relation to the other passengers you are picking up during that trip. Consider who will be getting off first so you can minimize the number of times passengers will have to be re-arranged. If you do not have enough room to safely seat/secure all of the passengers at the stop, contact Dispatch/Operations.
- Once vehicle is stopped and secured, exit the vehicle to assess the area to ensure the ramp/lift can be deployed on level ground and away from hazards if it is needed.
 - Our goal is to provide the safest possible location based on conditions. Communicate this to the passenger if a concern is expressed.
- Only use the horn (or backup alarm) to alert your passenger that you have arrived if it is a specific contractual requirement

At the Passenger Location (cont.)

- SCAN to ensure steps/ramp/walkway are safe
- Confirm you have correct passenger
 - PCA/Companion
 - Additional Riders
- Confirm drop off location



Instructor Notes:

- Discuss various considerations when at a passenger location.
- SCAN for hazards to ensure the path of travel is safe for you and your passengers.
- Determine the level of assistance your passengers will need. A steady arm? Deploy the ramp/lift?

Discussion Points:

- **Ask participants:** *What should you consider when at a passenger location?*
- Wait for responses. Look for responses such as whether the passenger needs the lift, where to deploy the lift, how many passengers are you picking up.
- Tell participants: when at a passenger location, we should consider the following:
 - SCAN (**S**urvey, **C**onsider, **A**nalyze, **N**otify) to ensure it is safe for you and the passenger. If you determine it is not safe (because the stairs are cracked, the ramp is broken, there is a large hole in the driveway, etc.), contact Dispatch for additional assistance.
 - Locate the passenger and introduce yourself. Confirm you have the correct passenger. (Make sure passengers identify themselves to confirm that you are picking up the correct passengers. This is especially important for paratransit service at one location with multiple passengers.) Confirm the address you have listed as the drop off location is in fact the correct address. If the address the passenger gives you is different than the address listed on the manifest contact Dispatch (**or follow local procedures**) for assistance.
 - Check the manifest for additional approved riders (PCA, Companion, Child, etc.). If there are discrepancies, contact Dispatch (**or follow local procedures**) for assistance.
 - If there are additional people waiting at the same location for a pick up, who are not listed on your manifest, contact Dispatch (**or follow local**

procedures) for assistance .

Ambulatory Passengers

- Communication is key to success
- When walking a passenger up vehicle steps, stay behind them
- When walking a passenger down vehicle steps, stay in front of them



Instructor Notes:

- Discuss specific challenges the operator should consider with ambulatory passengers.

Discussion Points:

- **Ask participants:** *What concerns do you have with ambulatory passengers?*
- Wait for responses. Look for responses, such as, some passengers may not be very stable and really should be using a mobility device. So instead, they attempt to walk and are unstable that could result in falls and injuries.

When at a passenger location, we should consider:

- Communicating with the passenger is the key. It's important to communicate the following to our passengers:
 - Please go slowly – we want our passengers to take their time in order to recognize hazards and ensure they remain stable to walk.
 - Please watch your step – on hazards and as they are going in/out of the vehicle.
 - Please use 3 point contact – remind them when going up/down steps/stairs. Don't forget to also use 3-point contact when walking up/down the steps too
 - Remain seated until the vehicle comes to a complete stop and I can assist you.
 - Please hold on to the handrails – If they are using the lift.
- When walking a passenger up the vehicle steps, operator should remain behind them.
Ask participants: *Why should we be behind passengers when going up the steps of the vehicle?* Response may be so if the passengers falls backwards, they will hopefully, not fall back and hit their head on the steps or walk.
 - As the passenger is walking up the steps, remember that you and the passenger should use 3 point contact.
 - By using 3 point contact, if the passenger should falter or become off-balance, you may be able to use your body to steady them again or prevent them from falling backwards.
 - It is important to remember to have a firm and secure grip on the rails in case you do have to use your body to lean forward on the passenger to prevent them from falling.

- When walking a passenger down the vehicle steps, operator should remain in front of them. **Ask participants:** *Why should we be in front of passengers when they are going down the steps of the vehicle?* Response may be so if they fall forward, they will hopefully, not fall on the step or pavement.
 - As the passenger is walking down the steps, remember that you and the passenger should use 3 point contact.
 - By you using 3 point contact, if the passenger should lose their balance, you may be able to use your body to steady them again or prevent them from falling forward.
 - It is important to remember to have a firm and secure grip on the rails in case you have to use your body to stop the passenger's fall.
 - Offer a steady arm to the passenger to assist to/from the vehicle.
 - If the passenger should trip/fall toward you, try to brace them with your body if possible to slowly lower them to the ground.
 - If the passenger should trip/fall forward or away from you, do not grab them as you may hurt them or you.

Mobility Aids

- What is a mobility aid?
- Used by people, not to describe people
 - Noun not adjective
 - Accurate terms
 - Tool for mobility

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Instructor Notes:

- What is a mobility aid?
- For many of us a mobility aid could be: an auto, motorcycle, truck, train, bicycle or airplanes.
- We are going to look at equipment or devices that have been designed specifically for people with disabilities to use to assist in getting around.
- **It is very important to understand that mobility aids are used by people — they are not used to describe people.**

Discussion Points:

- How many times have you heard someone referred to as a “wheelchair person”?
- It is not accurate or appropriate. Wheelchair is a noun not an adjective. Yet for some reason we hear it often. We would not say: the “cane person”, the “walker person” or the “crutches person” — it makes no sense and is offensive.
- **Put the person first and then the mobility aid.**
- Accurate and appropriate terms would be:
 - A person who uses a wheelchair
 - The woman who uses a cane
 - The passengers who use walkers
 - The man who uses the lift
- We also need to consider how important a mobility aid can be to a person with a disability. It is a tool for mobility, but without it or without it working properly, a person’s mobility and independence is affected. Therefore, handle a mobility aid with great care.

Mobility Aids

- Passengers use mobility aids for assistance
- Communicate with passenger throughout the walk
- Secure mobility aid in vehicle
- Upon arrival at destination, remind passengers to remain seated until operator can assist



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Instructor Notes:

- Discuss specific challenges the operator should consider when at a passenger location with passengers using canes, walkers and crutches.
- Be aware of potential falls as passengers with canes, walker or crutches may not be stable - that is the reason they are using them
- Communication is the key during the “walk” and upon arriving at the destination.

Discussion Points:

Ask participants: *What should you consider with passengers using canes, walkers and crutches?* Wait for responses. Look for responses such as, they are using the aids as they may not be stable enough to walk on their own and they may need additional assistance.

Tell participants: when assisting passengers using canes, walkers or crutches, we should consider the following:

- Communication is imperative. We should remind our passengers to slow down, watch your step, use 3-point contact when walking up/down steps.
 - When passengers are riding the lift – instruct passengers to hold onto the handrails until the lift comes to a complete stop and you are there to assist. Remember – unless specifically required by contract, we are not allowed to ride the lift for any reason.
 - Remind passengers to watch their head/duck if needed to avoid hitting their head when entering the vehicle
- Secure the mobility aids in the vehicle. **Ask participants:** *How do we secure mobility aids in the vehicle?* Wait for responses. Responses may include: we secure mobility aids with another seat belt, securement strap(s), and/or bungee cord. **Ask participants:** *Why do we secure mobility aids in the vehicle?* Wait for responses. Responses should include: so they do not become projectiles inside the vehicle in the event you are involved in an accident or hard braking event.
- Upon arrival at the passenger’s destination, remind them to remain seated until you can assist. We want the passenger to remain seated and wait for our

assistance to minimize the possibility of a passenger fall and/or injury.

Please Note: professional statistics reflect a concerning number of passenger falls and injuries due to them not waiting for assistance. Be sure to emphasize that you are not trying to infringe on their independence, but rather it is for their safety and protection.

Manual Mobility Devices

- Using proper body mechanics
- Assistance techniques
- Minimize risk inside the vehicle
- One at a time

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Instructor Notes:

- This slide is not intended to teach from. Simply read the topics which will be covered in the next several slides

Discussion Points:

- None

PUSHING

- Stand close and lean slightly toward the object you're pushing
- Position both feet flat on ground and center your balance before pushing



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Instructor Notes:

- Ask participants if they have ever pulled a muscle or other injury while pushing an object? Ask them to share how simple the maneuver was which caused the injury.
- Point out that it often does not require much force to cause an injury
- Have a participant sit in a wheelchair while you demonstrate this maneuver in the classroom (if you do not have space in the classroom to do this, find suitable space in the facility)

Discussion Points:

- Most people don't think the act of pushing could cause an injury
- The truth is, it can be as dangerous to your back as a fall
- Many people remember to bend their knees when they lift a heavy object, but forget to do so during pushing and pulling movements
- Bending your knees and drawing your belly in to engage your deep core muscles protects your lower back from pain and injury

PUSHING (CONT.)

- Bend your knees and engage core muscles
- Begin movement slowly
- Avoid sudden movements (jerking, yanking, etc.)
- Push with arms and legs
 - Avoid pushing with back



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Instructor Notes:

- None

Discussion Points:

- When you have a choice between pushing and pulling, pushing provides a safer alternative for your lower back, because it allows you to use your own body weight while maintaining a neutral postural alignment.

PULLING

- Stand close to object you are pulling
- Position both feet flat on ground with one foot in front of the other
- Center your balance before pulling
- Bend your knees and engage core muscles

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Instructor Notes:

- Cover points on the slide
- Allow and/or encourage discussion when appropriate
- Have a participant sit in a wheelchair while you demonstrate this maneuver in the classroom (if you do not have space in the classroom to do this, find suitable space in the facility)

Discussion Points:

- If pulling the object is your only choice, bend your knees and place one foot in front of the other, maintaining a wide base of support.
- If you keep the object close to you, you'll have better leverage from your legs, and less stress on your lower back.

PULLING (CONT.)

- Maintain a straight spine
- Keep arms close to body and wrists straight
- Begin movement slowly
- Avoid sudden movements (jerking, yanking, etc.)



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Instructor Notes:

- None

Discussion Points:

- Maintain a straight spine, with your arms close to your body, and protect your wrists by keeping them straight.

TWISTING

- What is twisting?
- Avoid twisting your spine
- When you need to turn, change direction with your feet
- Avoid awkward positions – reposition your body
- Move close to object to prevent over reaching

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Instructor Notes:

- Stand and demonstrate the twisting motion operators should avoid
- Demonstrate the movement very slowly to avoid injuring yourself
- Have a participant sit in a wheelchair while you demonstrate this maneuver in the classroom (if you do not have space in the classroom to do this, find suitable space in the facility)

Discussion Points:

- What is twisting?
 - Turning or changing direction.
- Avoid twisting your spine.
 - Your spine is meant to be straight and elongated. When you twist your lower back you run the risk of overstretching or tearing any of the large muscles or supporting ligaments around your spine. In response to this damage, the surrounding area will usually become inflamed. This inflammation can lead to a back spasm, and it's the back spasm that can cause severe lower back pain.
- When you need to turn, change direction with your feet.
 - This keeps your back straight and elongated
- Avoid awkward positions.
 - Sometimes during securement you find yourself in an awkward position.
 - Reposition your body to keep your back straight and avoid twisting in an unnatural position.
- Move close to an object to prevent over reaching.
 - When reaching, if you find that you are not close enough to the object – move closer to it.

- Avoid extending your arm and over reaching to reduce the chance of an injury to your neck, back or shoulder.

LIFTING

- Stand close to the object
- Position both feet flat on the ground and center your balance
- Bend your knees and engage core muscles
 - Avoid bending at the waist

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Instructor Notes:

- Share with participants that an injury to their back could present issues over a lifetime – using caution is an understatement.
- Our discussion on lifting is continued on the next slide.
- Provide an empty cardboard box to demonstrate proper lifting techniques to the operators.

Discussion Points:

- Safe lifting is a skill that can be learned and practiced. Using your arms and shoulders to lift and carry a load or object comes naturally.
- Utilize the other parts of your anatomy that are several times more powerful than your back — your legs. By using the methods described in this section, you can develop safe lifting techniques.
 - Stand close to the object.
 - Position both feet flat on the ground and center your balance.
 - Your body is like a machine. If the load is farther away from the center of gravity, the harder the machine has to work. Holding an object out at arm's length is much more difficult than holding the same object close to your body.
 - Keeping the center of gravity low and close to your body will also help protect your weaker muscles from injury.
 - Bend your knees and engage core muscles.
- The most effective and injury reducing way to lift is to squat down, keeping your back

nearly vertical.

LIFTING (CONT.)

- Firm grip
- Keep your back straight
- Make a smooth lift
- Avoid twisting
- Lowering the load

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Instructor Notes:

- Continue with the discussion of proper lifting techniques.
- Share the points on this slide.

Discussion Points:

- Get a firm grip of the object.
- Lifting with the back straight (as close to vertical as possible) distributes pressure evenly over the complete spine.
 - Tucking your chin and raising your head will align the entire spinal column. Doing this will automatically raise your chest and put your shoulders in a better position for arm action. Keep your chin tucked in throughout the lifting movement. As you reach the standing position, allow your chin to return to normal.
- Make a smooth lift.
 - Always use a smooth motion and avoid jerking when lifting.
 - Keep the load close to your body.
- Avoid twisting.
 - Once the object has been lifted, avoid twisting your body to change directions. Turn by changing the position of feet. Twisting increases the stress to the lower back.
- When lowering a load, use the same principles of keeping your back straight and your knees bent.
 - Use the same procedures if you are simply unlocking a securement device, unbuckling a seat belt, or picking up something small.

Maneuvering – General Guidelines

- Act with caution at a safe pace
- Be directly behind mobility device before attempting to move it
- Position feet solidly and shoulder distance apart with one foot slightly forward
- Center your balance before pushing or pulling

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Instructor Notes:

- There are general guidelines to follow when maneuvering to protect yourself from injury.
- These general guidelines are continued on the next slide.

Discussion Points:

- Vehicle operators can safely maneuver mobility devices without injury by using proper body mechanics.
- The following general guidelines should be observed whenever maneuvering mobility devices:
 - Act with caution at a safe pace.
 - Be sure to be directly behind the mobility device before attempting to move it.
 - Properly leverage body.
 - Position your feet solidly and shoulder distance apart with one foot slightly forward.
 - Center your balance before pushing/pulling.

General Guidelines (Cont.)

- Begin movement slowly
- Always push instead of pull
- Push with your arms and legs – never your back
- Request assistance if mobility device is heavy or awkward



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Instructor Notes:

- None

Discussion Points:

- Begin movement slowly and do not jerk, jab, stab, yank or pull suddenly.
- Always push instead of pulling and push with arms and legs; never push with your back.
- Request assistance if mobility device is heavy or awkward.

Choice of Path

- **Flat and level ground**
- Look for a path that is smooth, firm and dry
- Avoid surfaces that are rough, soft, wet, slippery or dirty
- **Inclines**
- Be positioned on down side at passenger's back
 - Enables you to push device forward up and back down
 - Provides better control

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Instructor Notes:

- Equally important as proper body mechanics is the choice of path taken when maneuvering wheelchairs.
- Choose the best path for maneuvering.
- Have a participant sit in a wheelchair while you demonstrate choice of path

Discussion Points:

- Whenever possible, choose a path that is on flat and level ground. Smooth, firm, dry, and clean paths make maneuvering a mobility device easy.
- When possible, avoid surfaces that are rough, soft, wet, slippery or dirty.
- If it is impossible to use flat and level ground and you must choose an incline, it is important to follow the general guidelines and remember to always be positioned on the down side at the passenger's back. This will enable you to push the device forward up the incline and back the device down the incline. It also provides better control for you on the incline so the passenger does not 'run' away from you in the event you lose control of the device.
- **(Discuss local procedures/requirements for inclines, steps, ramps, etc.)**

Lift Usage – Mobility Devices

- Mobility device should be centered onto lift
- Secure brakes (if equipped)
- Some passengers may be able to perform tasks independently
- Power mobility devices should be powered off before operating lift



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Instructor Notes:

- This and the following slides will cover general guidelines for loading mobility devices on your vehicle.
- ***Insert local policy or procedure as applicable in these general guidelines.***
- Consider an on-bus demonstration of this procedure, or bringing props into the training room to degree possible to enhance the learning.

Discussion Points:

- Mobility device should be centered onto lift.
- Secure brakes (if equipped).
- Some passengers may be able to perform tasks independently such as; lock their own brakes, maneuver themselves onto and off of the lift. It is the operator's responsibility to communicate and verify these tasks are completed correctly.
- Power mobility devices should be powered off before operating the lift.

Lift Usage (Cont.)

- Instruct passengers riding lift to hold onto yellow handles
- Secure lift belt (if equipped) before operating
- Communicate all actions before performing any movement of lift with passenger aboard



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Instructor Notes:

- ***If there are differences in your local policy or equipment, adjust accordingly.***

Discussion Points:

- Instruct passengers riding the lift to hold onto yellow handles.
- Secure the lift belt before operating the lift.
- Communicate all actions before performing any movement of the lift with passenger aboard.
- In cases where the passenger can do these tasks and/or refuses the assistance of the operator, it is the operator's responsibility to communicate with the passenger.
- Let the passenger know that he/she needs to wait until you give instructions that it is safe to move, lock or unlock brakes, etc.

Loading onto Lift

- Passengers using mobility devices should face away from the vehicle
- Passengers may elect to ride in any other position

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Instructor Notes:

- Loading onto the lift is continued on the next slide.
- Share the information on this slide and move to the next.

Discussion Points:

- We strongly recommend that passengers using mobility devices should face away from the vehicle when using the lift.
- The passenger can elect to ride the lift in any other position they choose in accordance with ADA regulation

Loading onto the Lift (Cont.)

- **Loading facing outward is safer:**
 - Majority of weight is concentrated toward supported end of platform
 - Less chance passenger's feet will get caught in gap plate
 - Operator can maintain better control
 - Device is in proper position to roll into securement position

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Instructor Notes:

- This slide covers the reasoning behind loading the passenger facing away from the vehicle
- It is important for operators to clearly understand the risk which led to this becoming best practice

Discussion Points:

- Loading facing away from the vehicle is safer:
 - The majority of the weight is concentrated toward the supported end of the platform, therefore, there is less sway.
 - There is less chance that the feet of the passenger will get caught in the gap plate as the lift raises to floor level.
 - The vehicle operator can maintain better control by having access to the hand grips of the wheelchair.
 - The wheelchair is in proper position to be rolled straight back into the securement position in the bus.

Loading from Outside

- **To load passenger onto lift from outside:**
 - Standing in front of chair, push chair back onto lift and set brakes
 - Secure lift belt (if vehicle is equipped with one)
 - Inform passenger you will be raising lift
 - Hold onto mobility device for stability
 - Raise lift to floor level

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Instructor Notes:

- Loading the passenger onto the lift platform from outside the vehicle requires sensitivity and respect for the passenger.
- Communicating each aspect of what is about to happen with the passenger allows them to be comfortable during this very vulnerable maneuver.

Discussion Points:

To load the passenger onto the lift from outside:

- Standing in front of the chair, push the chair back onto the lift and set the brakes.
- Secure the lift belt (if vehicle is equipped with one).
- Inform passenger you will be raising the lift.
- Hold onto the mobility device for stability.
- Raise the lift to floor level.

Into Vehicle from Lift

- **To load passenger into vehicle from lift:**
 - Ask passenger to remain on lift with brakes set until you can enter vehicle
 - Once you enter vehicle and get to lift area, let passenger know it is time to move into vehicle
 - Unlock brakes
 - Maneuver device into securement position
 - Lock brakes when positioned properly

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Instructor Notes:

- It is critical that all the steps in this process be followed carefully to achieve maximum safety for passengers.
- Emphasize the dangers of cutting corners during this process.

Discussion Points:

To load the passenger into the vehicle from the lift:

- Ask passenger to remain on the lift with the brakes set until you can enter the vehicle.
- Once you enter the vehicle and get to the lift area, let the passenger know it is time to move into the vehicle.
- Unlock the brakes.
- Maneuver device into securement position.
- Lock the brakes when positioned properly.

LOADING ONTO RAMP

- Passenger faces vehicle on ramp during loading and unloading
- Operator also faces vehicle standing behind device
- Move slowly up and down ramp
- Maintain control of device while on ramp



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Instructor Notes:

- Explain why using the ramp is different from the lift regarding the direction passenger faces.
- Passenger faces the vehicle going up the ramp to allow the passenger's body to be held back into the wheelchair and prevent them from falling forward should there be a need to stop quickly or hitting a bump etc.

Discussion Points:

Ramps:

- When maneuvering devices up and down ramps, you should always be positioned on the down side at the passenger's back.
- During loading, passenger should be facing the vehicle and you should be pushing up the ramp.
- During unloading, passenger should be facing the vehicle.
- You should be standing behind the device also facing vehicle.
- Slowly walk the device down the ramp.
- This increases control of the device movement.

Electronic mobility devices:

- Be sure the speed is set to the lowest setting.
- Passengers can elect to enter the vehicle on the ramp either facing the vehicle or facing away from the vehicle.
- Depending on the size of the device, passengers may have to enter the vehicle facing away from the vehicle in order to maneuver into the securement position properly.

Powered Mobility Devices

- Communicate with passenger
- Slow down
- Power down/off
- Attentive to passenger during ramp usage
- Maneuvering motorized devices
- Minimize risk inside the vehicle
- One at a time



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Instructor Notes:

- Discuss specific challenges the operator should consider with passengers using powered mobility devices.
- Remember that we need to be in constant communication with passengers in motorized mobility devices in order to prevent injuries to them, and to us

Discussion Points:

- **Ask participants:** *What concerns do you have with passengers using powered mobility devices?* Wait for responses. Look for responses, such as, some passengers are unable to maneuver their powered mobility device properly and safely and various sizes of mobility devices could be a loading concern on the vehicle.
- When at a passenger location, we should consider:
 - Communicating with the passenger is the key:
 - When getting on the lift, ask passenger to power the device down to the lowest gear. **Ask participants:** *Why is it important to ask passengers to power the device down to the lowest gear before boarding the lift/ramp?* Wait for responses. Response should be so the passenger does not quickly accelerate onto the lift and get injured.
 - After the passenger boards and is centered on the lift, ask the passenger to power down (off) the mobility device. **Ask participants:** *Why do we ask passengers to power down (off) the mobility device once they are on the lift?* Wait for responses. Response should be so while the lift is being deployed, they do not accidentally engage the controller causing their mobility device to move (possibly off the lift).
 - When exiting the lift and maneuvering into the vehicle, ask the passenger to turn on the powered mobility device to the lowest gear. **Ask participants:** *Why do we want the passengers to use the lowest gear?* Wait for responses. Response should be so they can maneuver around in the vehicle slowly.

- Once the passenger is positioned in the vehicle securement area, ask the passenger to turn the mobility device off. **Ask participants:** *Why we ask passengers to turn off the mobility devices?* Wait for responses. Response should be – so the passenger doesn't run you over or hit you by mistake while you are securing them.
- When getting off the lift, ask them to power down to the lowest gear.
- Only allow the occupant (or PCA if situation permits) to maneuver the motorized device. **Ask participants:** *Why operators shouldn't maneuver a passenger's motorized device?* Response should be because we may damage the device or injure the passenger since we are not familiar with the device.
- Minimize risk inside the vehicle – one at a time. **Ask participants:** *What do you think we mean by this?* Wait for responses. Response should be to only secure/unsecure one passenger at a time in the vehicle. By having multiple passengers on the vehicle unsecured, they may injure each other and/or themselves, as well as become a distraction to you.
- If using a ramp, operators should be attentive to the passenger maneuvering up/down ramp. If we are not paying attention, passengers could maneuver themselves right off the ramp if they are going too fast.

LOADING MULTIPLE PASSENGERS

- Residential
- Group Homes
- Work Sites/Agencies
- Special Events



Instructor Notes:

- Explain the procedures for loading multiple passengers at the different location types.

Discussion Points:

There may be cases where you will pick up more than one passenger at the same location. Following the best practices outlined below will help minimize risk for passengers:

- When picking up **all ambulatory passengers** entering through the service door:
 - Assist each passenger onto the vehicle one at a time. Ask all other passengers to wait patiently while you assist the other passenger(s).
- When picking up **both ambulatory passenger and a standee passenger using lift**:
 - Assist standee on the lift first. Ask passenger entering through the service door to please wait patiently while you assist the other passenger. Once passenger using the lift is seated and secure in the vehicle, exit the vehicle to assist the passenger entering through the service door.
- When picking up **both ambulatory passenger and a passenger using mobility device on lift**:
 - Assist passenger entering through the service door first. Ask passenger using mobility device to set brakes (or power device off) and wait patiently while you assist the other passenger. Once passenger entering through the service door is seated and secure in the vehicle, exit the vehicle to assist passenger using mobility device on the lift.
- When **picking up standee on lift and mobility device on lift**:
 - Assist standee passenger using the lift first. Ask passenger using mobility device to set brakes (or power device off) and wait patiently while you assist the other passenger. Once standee passenger using the lift is seated and secure in the vehicle, exit the vehicle to assist passenger using mobility device on the lift.
- When **picking up all standees on lift**:
 - Assist each passenger onto the vehicle one at a time. Each passenger must be seated and secured in the vehicle before assisting the next passenger.
- When **picking up all mobility devices on lift**:
 - Assist each passenger onto the vehicle one at a time. Each passenger and mobility device must be secured in the vehicle before assisting the next passenger.
- **When using the lift, fold and stow the lift after each passenger enters/exits the vehicle. This can help prevent passengers from rushing to the lift doors and falling out while you are away from the lift area.**

WORKING WITH SERVICE ANIMALS

- Must be allowed to accompany persons with disabilities
 - Not just dogs
- Receive special training
- Documentation?
- Disruptive animals
- Walk on opposite side of service animal



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Instructor Notes:

- **Discuss local policies and procedures pertaining to disruptive behavior**

Discussion Points:

- **Ask participants:** *What is your experience with a person and a service animal?*
- **Ask participants:** *What types of service animals have you seen, and how did you know it was a service animal?*
- Service animals must be allowed to accompany persons with disabilities (49 CFR 37.3)
- A service animal can be a dog, snake, bird, miniature horse, or other that is trained to work or perform tasks for an individual with a disability, including but not limited to:
 - guiding individuals with impaired vision
 - alerting individuals with impaired hearing to intruders or sounds
 - providing minimal protection or rescue work
 - pulling a wheelchair
 - fetching dropped items
- Documentation not necessary or required to be transported
- Service animals are working animals, not pets
 - Do not pet, distract, or interact with service animals beyond what is necessary for loading, unloading, and transport
- Be aware of other passenger's reactions to the animal
- Service animals should not ride the lift for their own safety
 - The only exceptions are when the passenger states that the animal must ride with them, or if the animal is physically unable on their own to use the steps (e.g. bird, snake, etc.)
 - In each case, however, the animal must be under full control of the passenger, including a leash or tether
- Preferably, the animal should board first and exit last – it should not be outside the vehicle “alone”
- Service animals are not to be disruptive
- Service Animals, especially dogs, have just as hard a time in the heat as people do

- Be sensitive to the passenger and their service animal
- Ask if the passenger needs additional assistance
- Walk on the opposite side of the service animal

Hazard Identification

Trip Hazards

- S.C.A.N.
- Securements left on floor
- Passenger items – bags, oxygen tanks, purses, service animals
- Remind passengers to watch their step



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Instructors Notes:

- When working with passengers using mobility devices/aids, there are hazards to take into consideration during loading, unloading and the transportation process.

Discussion Points:

- S.C.A.N. (Survey, Consider, Analyze, Notify) the area for any potential hazards.
- When moving around inside the vehicle, you and your passengers need to be aware of any potential trip hazards – securements on the floor, passenger personal items such as grocery bags, purses, oxygen tanks, service animals, etc.
- When passengers are entering and exiting the vehicle or moving about inside the vehicle to and from the seat, be sure to alert them to these hazards.
- Remind passengers to watch their step, help guide them around these potential hazards to minimize the possibility of a slip, trip or fall.

At Drop Off Location

- Know where you are going
 - Check address
- Passengers who cannot be left alone
 - Make sure someone is home
 - Do they have their own key?
 - Two or more
 - What to do?



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Instructor Notes:

- Some of our passengers may be designated as not to be left alone.
- Discuss how to handle a situation with a passenger who cannot be left alone.
- We need to be aware of those individuals riding on our vehicle and ensure we follow the policies and procedure to keep them safe.

Discussion Points:

- Sometimes we transport passengers who are able to ride the vehicle alone, but cannot be left at the drop off location alone. This may be because of their level of disability or for some other reason that may not be provided.
- **Ask participants:** *What are some concerns you experience with passengers who cannot be left alone at their drop off location?*
 - Wait for responses. Look for responses such as, ensuring someone is home or delays of service when having to wait on an authorized individual.
- Before dropping off a passenger that should not be left alone make sure you are at the correct address. If the passenger leaves and enters a house with their own key, stay put and notify Dispatch so they can make sure someone is home.
- What do we do when there are two or more passengers on board the vehicle who cannot be left alone but are being dropped off at different addresses?
- **Discuss local contractual requirements and policies that are specific to your location.**

Onto Lift from Inside Vehicle

- To load passenger onto lift from inside vehicle:
 - Unfold lift to floor level
 - Ensure lift belt is fastened
 - Communicate actions to passenger
 - Push device forward to the lift

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Instructor Notes:

- Concentration on this process is important.
- While the lift is up in the air with the passenger on the platform, it is a very fearful time for them.
- Reassure them throughout the entire process, but especially during this portion of the loading using a lift.

Discussion Points:

To load the passenger onto the lift from inside the vehicle:

- Once the lift has been unfolded to floor level, let the passenger know you will be maneuvering him/her to the lift area.
- Ensure the lift belt is fastened to prevent passenger from falling off lift.
- Push device forward to the lift.

Onto Lift from Vehicle (Cont.)

- Slowly and carefully push device forward onto lift in a centered position facing out
- After passenger is out onto lift, instruct them to hold handrail
- Exit vehicle
- Hold onto device
- Inform passenger you will be lowering lift
- Lower lift until it is flat on ground

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Instructor Notes:

- Provide verbal support to the passenger to reassure them as you leave them out on the lift to join them outside.
- Use extreme caution to be sure the brakes are set and will hold the wheelchair in place on the lift platform.
- Inform the passenger about how noisy the lift can be so that it does not surprise or alarm them.

Discussion Points:

- Slowly and carefully push the device forward onto the lift in a centered position facing out.
- After passenger is out onto the lift, instruct them to hold handrail for additional support.
- Exit the vehicle.
- Hold onto the device
- Inform passenger you will be lowering the lift.
- Lower the lift until it is flat on the ground.

Unload from Lift

- **To unload passenger from lift:**
 - Unfasten lift belt (if equipped)
 - Unlock brakes
 - Maneuver device off of lift

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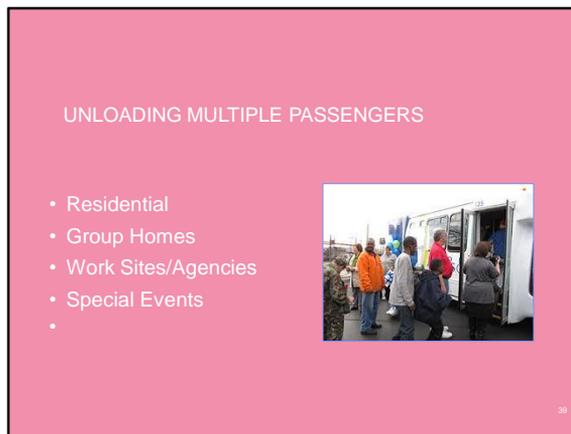
Instructor Notes:

- Make every effort to be sure the passenger's arms, legs, hands are clear of any part of the lift before rolling them off the lift platform.
- As you maneuver the device off the lift be sure there is nothing to impede their path.

Discussion Points:

To unload the passenger from the lift:

- Unfasten the lift belt (if equipped)
- Unlock the brakes
- Maneuver the device off of the lift



Instructor Notes:

- Explain the procedures for unloading multiple passengers at the different location types.

Discussion Points:

There may be cases where you will drop off more than one passenger at the same location. Following the best practices outlined below will help minimize risk for passengers:

- When dropping off **all ambulatory**:
 - Assist each passenger off of the vehicle one at a time. Ask all other passengers to wait patiently while you assist the other passenger(s).
- When dropping off **ambulatory and standee on lift**:
 - Assist ambulatory passenger exiting through the service door first. Ask the standee passenger to please remain seated until you can provide assistance. Walk down the stairs first and ask the ambulatory passenger to wait until you exit the vehicle before proceeding down the stairs. Once passenger using the stairs has successfully exited the vehicle, unfold the lift and re-enter the vehicle to assist the standee passenger to the lift.
- When dropping off **ambulatory and mobility device on lift**:
 - Exit the vehicle and unfold the lift. Return to the vehicle and unsecure and assist the passenger using the mobility device off the vehicle first. Remind the ambulatory passenger remain seated and keep the seatbelt fastened until you can return to assist.
- When dropping off **standee on lift and mobility device on lift**:
 - Exit the vehicle and unfold the lift. Return to the vehicle and unsecure and assist the passenger using the mobility device off the vehicle first. Remind the standee using the lift to remain seated and keep the seatbelt fastened until you can return to assist.
- When dropping off **all standee on lift**:
 - Assist each passenger off of the vehicle one at a time. Each passenger must remain secured until you are ready to assist him/her onto the lift and off of the vehicle.
- When dropping off **all mobility devices on lift**:
 - Unsecure and assist each passenger off of the vehicle one at a time. Each passenger and device must remain secured until you are ready to assist him/her onto the lift and off of the vehicle.
- **When using the lift, fold and stow the lift after each passenger enters/exits the vehicle. This can help prevent passengers from rushing to the lift doors and falling out while you are away from the lift area.**

Departing Passenger Location

- Ensure ramp/lift is stowed
- Ensure all passengers are secured in their seats
- Get the Big Picture prior to pulling away
 - What has changed since you arrived?

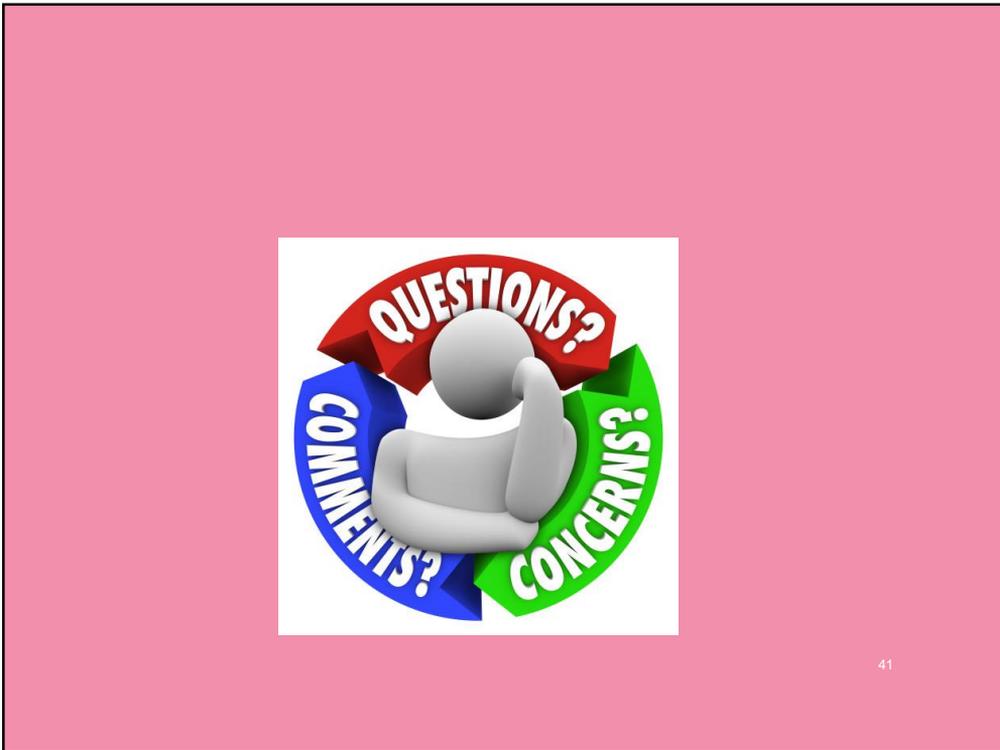


Instructor Notes:

- Discuss various things the operator should consider when departing a passenger location.
- Be sure to “Get the Big Picture” both inside and outside your vehicle prior to pulling away from the location.

Discussion Points:

- **Ask participants:** *What other things should they consider?*
- In preparation to depart the passenger location, we should:
 - Ensure the ramp/lift is stowed.
 - Ensure all the passengers are secured in their seats. Re-confirm all passengers on board are secured and re-check those passengers using mobility devices to ensure securements are intact.
 - Ask yourself:
 - Is everyone on board safe?
 - Are all passengers in a seat?
 - If it was a family member of mine, would I pull away or would I wait until they were safely seated?
 - How would I feel if one of my passengers were injured because I pulled away too soon?
 - **Ask the group:** *What do we mean by “Get the Big Picture” prior to pulling away?* Wait for responses. Look for responses, such as, knowing what is around your vehicle PRIOR to pulling away. Has the scenario around you changed since you first arrived (vehicles parked in front or behind you)? Are there any pedestrians walking near you? Are there any vehicles passing by (remember to rock and roll in your mirrors to eliminate those blind spots)? Are there any signs or poles near your vehicle that you should be aware of when pulling out (tail swing)?
 - Once you are certain it is safe to pull away, signal your intentions, check your mirrors, rock and roll to see in and around blind spots, make sure it's clear, pull away slowly at a safe speed for conditions.



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Instructor Notes:

- Use this opportunity to evaluate the learning based on what questions are asked from the participants
- If there seems to be an area that lacked general understanding – take the time to clarify the main points
- It is important to be sure everyone is comfortable with moving on to the next section of this training

Discussion Points:

- None

REVIEW

1. What is proper procedure for approaching a passenger location?
2. How would you obtain information about passenger you are to pick up?
3. When walking a passenger up vehicle steps where should you be positioned?
4. What is recommended procedure for loading an ambulatory passenger and a passenger using lift?
5. What should you do prior to leaving drop off location?

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Instructor Notes:

- Use this opportunity to insure that there are no misunderstandings or confusion with the content of this section.
- If there seems to be participants who are not able to answer these questions, take the time to return to the content and cover it again.

Discussion Points:

Answer to Question #1: Scan the area and risk assess by finding a safe location to park the vehicle, deploy the ramp/lift and pick up the passenger.

Answer to Question #2: Review the passenger manifest for any pertinent information.

Answer to Question #3: When walking a passenger up the vehicle steps, we recommend being behind them.

Answer to Question #4: Assist standee on the lift first and ask the passenger entering through the service door to please wait patiently while you assist the other passenger.

Answer to Question #5: Ensure ramp/lift is stowed, all passengers are secured in their seats and get the big picture prior to pulling away.

SUMMARY

- Loading and unloading passengers may be complicated at times
 - Requires you to be reassuring to allow them to feel comfortable and safe
- Caring for your passengers will establish trust and confidence in your ability to keep them safe



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Instructor Notes:

- Summarize this section by briefly covering the points on this slide.

Discussion Points:

- None

THANK YOU

***This section of training
is now complete***

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Instructor Notes:

- None

Discussion:

- None