

PASS Program Handbook



Introduction

This handbook is a documentation of the PASS training program that has been taught for over 30 years in the United States. Through the creation of this handbook, CTAA's intention is to provide as many answers to common questions as possible, as well as provide effective instructions for the public and private sector agencies and prospective PASS trainers on how to incorporate this training into their regular business activities. Our intention is for this document to provide clarity in regards to CTAA's internal policies and procedures. Through the creation of this handbook, we hope to demystify this process and provide a big-picture view of the training we provide.

Terms, Acronyms, and Definitions

CTAA uses a number of industry-specific terms when working with PASS. For the sake of understanding we are listing the most common ones here:

Body-on-Chassis (BOC): A class of passenger vehicles fashioned from a cutaway van fit with a passenger compartment. Access to the vehicle for people using assistive devices is facilitated with an installed wheelchair lift.

Community Transportation: Community Transportation is CTAA's primary focus. While organizations such as APTA and government agencies like the FTA focus on large urban transportation systems, CTAA focuses on rural and small urban systems. These smaller systems encounter unique challenges and have far fewer resources to address them, but are no less necessary for the people living in their service regions.

Classroom: The learning environment setup for CTAA's Training. This can be a physical space or an online training.

NEMT: Non-Emergency Medical Transportation.

PASS: Passenger Assistance, Safety, and Sensitivity.

PASS Basic Certificate: The certificate obtained by completing the PASS Basic Online course. The possessor of a PASS Basic Certificate is considered trained to proficiency in the Safety and Sensitivity component of PASS.

PASS Basic: Either a classroom or online, self-paced course that is designed to fulfill the Safety and Sensitivity training component of the PASS Program. Participants who successfully

complete PASS Basic receive a certificate and are considered trained in transporting ambulatory passengers.

Full PASS (Lift Operating Procedure, Wheelchair and Occupant Securement): This classroom training focuses on vehicle lift operating procedures and wheelchair securement techniques. This training can only be taken by current PASS Basic Certificate holders within 90 days from issuance of the PASS Basic certificate. This training must take place using a vehicle the driver will be transporting passengers on, using the accessibility equipment available. This equipment consists of either: 1) a wheelchair lift mounted on a Body-on-Chassis (BOC) vehicle, or 2) a ramp mounted on a passenger minivan.

PASS Trainer: An individual who has successfully completed the PASS Basic, Full PASS, and PASS Trainer curriculum. PASS Trainers are authorized to train drivers and the PASS Trainer certification is valid for three years.

PASS Program: The PASS Program consists of all the individual training elements that make up CTAA's Passenger Assistance, Safety, and Sensitivity training program. There are three elements in the PASS program: PASS Basic, Full PASS, and PASS Trainer.

PASS Master Trainer: A Subject Matter Expert (SME) on Passenger Assistance, Safety, and Sensitivity. These individuals are selected by invitation from CTAA from the top experts in the transit field. These individuals are responsible for the review, critique, expansion, and improvement of the PASS Program, and participate in CTAA's annual review of the Program. Master Trainers are also the only individuals allowed to train CTAA's PASS Train-the-Trainer program. In addition, Master Trainers are considered PASS Trainers in terms of training drivers as well as transporting passengers.

PASS Trainer: CTAA's program for training PASS Trainers. Participants in this program must complete two online, self-directed prerequisite classes: PASS Basic Online, and Techniques for Training PASS. Once the prerequisites are complete, the participants attend either: 1) an in-person two-day classroom, or 2) A two-day virtual course and one-on-one virtual training session. All PASS Trainer classes are taught by a PASS Master Trainer. Successful completion of the PASS Trainer curriculum awards the participant a PASS Trainer Certification.

Proficiency: The educational standard of the PASS Program is to train to proficiency. Proficiency is defined as having a comprehensive understanding of all aspects of the subject matter, as well as being able to execute all practical components of any physical techniques independently and correctly, without trainer assistance.

Safety and Sensitivity: The component of PASS taught in the PASS Basic Training course.

Techniques for Training PASS: A training course designed to train PASS Trainers in techniques for adult education and training. Completion of this training is the prerequisite towards obtaining a PASS Trainer certificate.

Wheelchair Lift: A hydraulic platform designed to board and deboard people using assistive devices from a passenger vehicle.

Wheelchair Securement: A component of the Full PASS course. Wheelchair securement training is always taught after the Safety and Sensitivity component of the PASS Basic course, and is never offered as a standalone course.

Wheelchair Ramp: A deployable ramp designed to facilitate the boarding and deboarding of passengers using assistive devices from a non-cutaway model of vehicle such as a minivan.

A Training Program that Focuses on the Passenger

PASS Training is unique in that it does not touch on all aspects of safety training, such as First Aid, CPR, or Defensive Driving training. The emphasis is on the passenger and ensuring the safety and comfort of the passenger at every step of the boarding and deboarding process. While potential drivers at transit agencies must complete several training programs focusing on high-stakes situations, PASS trains drivers and trainers on safely securing passengers as its primary focus. Training on bloodborne pathogens and passenger evacuation is also included as an element of passenger safety - this is to provide drivers with a basic understanding of how to approach these safety issues should they be presented with an emergency situation on the vehicle.

PASS Training Outline:

The Professional Transportation Provider

- Introduction
- Distracted Driving
- Driver Fatigue
- Transit Employee Occupational Safety and Health
- Your Role as a Professional
- Professional Driving
- Customer Service
- Communication
- Stress

Understanding Your Customers

- People are People First

- People First Language
- Knowing Your Passengers
- Sexual Harassment
- Assisting Passengers with Service Animals
- Disability Awareness
- Medical Conditions
- Diabetes
- Epilepsy or Seizure Disorders
- Kidney Dialysis

Transporting Passengers

- Transporting an Aging Society
- Elderly Abuse Recognition, Reporting
- Lift Operation
- Wheelchair Securement
- Securing the Wheelchair Occupant
- Mobility Equipment and Features
- Passenger Securement

Responding to Accidents, Incidents, and Emergencies

- Accidents and Emergencies
- Evacuation
- Fire Extinguishers
- Bloodborne Pathogens

The Americans with Disabilities (ADA) Act

Driver Certification Exam

Train-the-Trainer Methods

- Techniques for Training PASS
- Skills Test and Proficiency Sign-Off
- Elements and Skills of an Effective Trainer
- Trainer Final Exam

IMPORTANT: A PASS Certification holder is not authorized to use acronyms or letters in reference to the certification for use after the participants' names.

The vast majority of individuals taking the PASS program will likely participate in the PASS Basic training and Full PASS training programs, if they provide ambulatory and non-ambulatory service. PASS Trainers with more than 7 years of experience in training PASS are eligible to be considered to serve as Master Trainers. Master Trainers are SMEs who conduct PASS Trainer

workshops, advise our current roster of PASS Trainers, and participate in Master Trainer annual meetings to update and refine the PASS curriculum.

The PASS program provides different levels and methods of training in order to accommodate the needs of all transportation providers. The scope of services provided is decided by the transportation provider – whether this is a nonprofit, a state agency, or a for-profit transportation corporation. For many of these providers who are equipped for and provide only ambulatory transportation services – services for individuals who will not need assistive devices to board and disembark the vehicle –, PASS Basic is required training.

Program Design

Background

For more than 30 years, the PASS program has been the industry standard for safety and sensitivity training for professional transportation providers. This program is designed to provide the foundation of training necessary to comply with all ADA (Americans with Disabilities Act) rules when transporting passengers. The program teaches drivers how to treat all passengers with dignity and respect, and provides instruction on operating vehicle-mounted lifts, ramps, and wheelchair securement equipment. It includes information on common hazards that a driver may encounter on the job, such as stress, fatigue, and exposure to bloodborne pathogens, and contains instructions on how to safely clean potentially contaminated medical waste. It also contains best practices on how to safely evacuate a vehicle in the case of an emergency.

Objectives and Intended Learning Outcomes

The goal of the PASS program is to train drivers and trainers how to conduct operations safely and do so in compliance with ADA rules while upholding the comfort and dignity of all passengers. In doing so, this allows transportation providers to protect themselves from the liability associated with fielding untrained drivers.

Performance Goals

CTAA is committed to ensuring that the drivers and trainers who complete the PASS program have achieved demonstrable skills and have completed a comprehensive training curriculum. Therefore all learners must complete all assessments with a score of 80% or higher. CTAA works diligently with PASS trainers and students to ensure that trainees complete the program in full. We allow for as many reviews and retests as possible; the highest concern is to ensure that drivers fully understand the content of the course and can fully demonstrate this knowledge by successfully completing all required assessments.

In order to prevent drivers taking our online course from attempting to pass their assessments via a “brute force” approach, our eLearning platform locks the participant’s course after three

failed test attempts. The driver must email CTAA to unlock and reset their course, and must restart the PASS Basic class and will automatically have to start at the beginning of the course.

Assessments

The PASS Program uses several different assessments to test participants for proficiency in the topics presented. For classroom settings, the PASS Trainer is responsible for conveying instructions for the assessments provided. In the case of multiple choice and true/false testing, this is a simple matter of instructing the participants to choose the single correct answer from those presented on each question.

Where independent online assessments are required, instructions and directions are supplied by CTAA's Learning Management System.

The Securement Skills Performance Evaluation is an important component of the PASS Trainer curriculum, since a Trainer must learn how to properly conduct and score the evaluation. This is the primary focus of the securement skills demonstration of the PASS Trainer class. During this demonstration, PASS Trainers are trained on the concept of proficiency, as defined in the above Glossary of Terms:

All PASS Trainers are instructed to train to Proficiency when conducting Securement Skills Performance Evaluations.

Time Allotted for Conducting Assessments

There is no time limit for assessments in PASS. Extra time is budgeted into classroom environments specifically to allow all assessments to be completed for all participants. If a participant requires more time to complete their assessment, arrangements are made to allow this to be achieved. This allows for learning styles and to avoid unfairly disadvantaging people with varying learning abilities who are otherwise fully capable of discharging the duties of their job position.

Grading of Assessments

The passing threshold on all multiple choice and true/false testing in the PASS program is 80%. The passing threshold on the Securement Skills Performance Evaluation is 100% – the participant must demonstrate proficiency with every activity described by the assessment.

Security

The physical security of PASS Classrooms are the responsibility of the hosting individual or agency. As the content of PASS is publicly available information, and no security-related incidents have ever taken place in a PASS classroom, this is considered sufficient procedure.

Instructional Strategy – PASS Basic & Full PASS

In order to meet passenger transportation providers where they are, and provide training for as many organizations and drivers as possible, CTAA provides multiple avenues of training. These versions of PASS are functionally identical in content and training methods.

Classroom-based training is difficult to arrange and attend in the more remote areas of the United States. While internet connectivity in these regions is an issue as well, the adoption of online training allows potential transit workers to train on their own schedules. Just the same, individuals in more remote parts of the US may find it easier to attend a 4-hour Wheelchair Securement Skills class than a 2-day classroom.

The following is a detailed explanation of how each component of PASS training fits into the program:

Pass Basic

PASS Basic is CTAA’s method of delivering the Safety and Sensitivity component of the PASS program in a self-directed online training format. The delivery method for online training differs from the classroom format in that testing takes place at the end of each module. The rationale for this method of training is to maintain engagement for potential drivers while they take an unsupervised training program. CTAA’s strategy in this case is to reinforce every component of the lesson at each step with a 10-question formative assessment. Each of these assessments has a passing threshold of 80%, and the participant can not continue to the next module until the end-of-module assessment is passed. After completing each test, feedback is provided to the participant, including the participant’s grade and which questions were and were not answered correctly. Participants must attain a passing score on each module’s assessment to move on to the next one.

CTAA is aware that this format may encourage participants to retake the end-of-module quizzes repeatedly without any review, in order to “brute-force” their way to passing the quiz. **In order to prevent this, the learning management system will lock any quiz that is failed 3 times.** If a quiz is locked, the participant must contact CTAA to reset their training. This will reset all progress on PASS Basic, requiring the participant to start over from the beginning. This is done to ensure that all participants review the content carefully as they proceed through the course.

Important Note: PASS Basic, by itself, is a full unit of training in the Safety and Sensitivity portion of PASS Training. Many drivers who work for organizations who only transport ambulatory passengers will only need PASS Basic to be fully trained. **Transportation Brokers consistently require Full PASS Certification to contract with agencies for NEMT service.**

PASS Basic Design Document

Topic	Audience	Learning Objectives	Modality	Measurement
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The Professional Transportation Provider	Passenger Transportation Drivers (initial training or seeking renewal)	The driver can identify the definition and roles of a professional transportation provider. The driver can identify the effects of fatigue and stress on a driver.	Instructional video, visual aids provided.	10 question formative assessment (electronic version)
Characteristics of the Professional	Passenger Transportation Drivers (initial training or seeking renewal)	The driver can identify the characteristics of a professional.	Instructional video, visual aids provided	10 question formative assessment (electronic version)
Understanding Your Customers	Passenger Transportation Drivers (initial training or seeking renewal)	The driver can identify the common characteristics of passengers who use transportation providers to access medical services.	Instructional video, visual aids provided	10 question formative assessment (electronic version)
Medical Conditions	Passenger Transportation Drivers (initial training or seeking renewal)	The driver can identify common medical conditions and their effects on customers.	Instructional video, visual aids provided	10 question formative assessment (electronic version)

<p>Creating a Welcome Environment</p>	<p>Passenger Transportation Drivers (initial training or seeking renewal)</p>	<p>The driver can identify how to create a welcome environment for all passengers on their vehicle. The driver can identify best practices on preventing falls, working with older adults with disabilities, working with service animals, and preventing sexual harassment on the driver's vehicle.</p>	<p>Instructional video, visual aids provided</p>	<p>10 question formative assessment (electronic version)</p>
<p>Responding to Accidents, Incidents, and Emergencies</p>	<p>Passenger Transportation Drivers (initial training or seeking renewal)</p>	<p>The driver can identify how to respond effectively to a variety of accidents, incidents, and emergencies. The driver can identify best practices on safely containing medical waste that could transmit bloodborne pathogens and properly evacuating a vehicle.</p>	<p>Instructional video, visual aids provided</p>	<p>10 question formative assessment (electronic version)</p>
<p>The Americans with Disabilities Act (ADA)</p>	<p>Passenger Transportation Drivers (initial training or</p>	<p>The driver can identify the aspects of the ADA that affect their vehicle,</p>	<p>Instructional video, visual aids provided</p>	<p>10 question formative assessment (electronic version)</p>

	seeking renewal)	their job, and their workday.		
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Full PASS

Participants in the PASS program who have completed PASS Basic have the option to obtain the full PASS Training that includes Lift Operating Procedures, Wheelchair and Occupant Securement. **Participants must complete the Full PASS training within 90 days of completing PASS Basic.** The rationale behind limiting the time gap between the two trainings is to maintain an acceptable timeline, while allowing the degree of flexibility that many transportation providers require to provide their transportation services. CTAA understands and recognizes that transportation providers often run into emergencies or labor shortages that make it difficult for a driver to attend two full days of training in a row. Taking PASS Basic as a self-directed course, then training on Full PASS within 90 days provides a way for organizations to structure their training around their agency’s schedule.

Full PASS

Topic	Audience	Learning Objectives	Modality	Measurement
Assisting our Passengers	Passenger Transportation Drivers (initial training or seeking renewal)	The driver can identify the best way to assist all passengers, and how to ask if a passenger needs assistance.	Supervised hands-on training using a demo vehicle with wheelchair securement equipment installed. Supplemental video content as provided.	10 question hands-on quiz and supervised wheelchair securement testing - the driver’s performance must be marked down as satisfactory by a PASS trainer on a checklist of common wheelchair

				securement activities.
Mobility Equipment and Features	Passenger Transportation Drivers (initial training or seeking renewal)	<p>The driver can identify the ADA definition of a wheelchair, a passenger's rights in regards to wheelchair securement, which occupied wheelchairs must be transported according to ADA regulations, weight limits of common wheelchair lifts, what constitutes a legitimate safety concern that could cause a transit provider to deny transportation, and wheelchairs that are and aren't designed for use as a seat in a moving vehicle.</p> <p>The driver can identify key important aspects of other mobility aids.</p>	Supervised hands-on training using a demo vehicle with wheelchair securement equipment installed. Supplemental video content as provided.	10 question hands-on quiz and supervised wheelchair securement testing - the driver's performance must be marked down as satisfactory by a PASS trainer on a checklist of common wheelchair securement activities.

		The driver can identify the medical effect of prostheses on human physiology.		
Assisting Passengers Using Mobility Devices	Passenger Transportation Drivers (initial training or seeking renewal)	The driver can demonstrate how to properly interact with passengers who are using mobility devices, how to regard a passenger's mobility aid as an extension of their body, where to place a wheelchair in a	Supervised hands-on training using a demo vehicle with wheelchair securement equipment installed. Supplemental video content as provided.	10 question hands-on quiz and supervised wheelchair securement testing - the driver's performance must be marked down as satisfactory by a PASS trainer on

		<p>vehicle for the most comfortable ride, and can identify and answer frequently asked questions about transporting wheelchairs.</p>		<p>a checklist of common wheelchair securement activities.</p>
<p>Accessible Lifts and Ramps</p>	<p>Passenger Transportation Drivers (initial training or seeking renewal)</p>	<p>The driver can identify the required features of an ADA-compliant wheelchair lift, the required features of an ADA-compliant accessible vehicle ramp, proper lift operating procedures, general guidelines for lift operation, safety precautions for lift operation, industry best practices, powered wheelchair safety precautions, and standee safety precautions</p>	<p>Supervised hands-on training using a demo vehicle with wheelchair securement equipment installed. Supplemental video content as provided.</p>	<p>10 question hands-on quiz and supervised wheelchair securement testing - the driver's performance must be marked down as satisfactory by a PASS trainer on a checklist of lift and ramp operations.</p>

<p>Mobility Device and Passenger Securement</p>	<p>Passenger Transportation Drivers (initial training or seeking renewal)</p>	<p>The driver can identify the ADA requirements for mobility aid accessibility, orientation, movement, design load, number of straps and proper use, difficult-to-secure mobility devices, frequently asked questions, seat belts and shoulder harnesses, and proper passenger securement.</p> <p>The driver can demonstrate a proper passenger securement.</p>	<p>Supervised hands-on training using a demo vehicle with wheelchair securement equipment installed. Supplemental video content as provided.</p>	<p>10 question hands-on quiz and supervised wheelchair securement testing - the driver's performance must be marked down as satisfactory by a PASS trainer on a checklist of common wheelchair securement activities.</p>
<p>Hands-On Exercises</p>	<p>Passenger Transportation Drivers (initial training or seeking renewal)</p>	<p>The driver can demonstrate the following:</p> <p>Lowering the lift, assisting onto the lift platform, raising the lift, assisting off the lift platform, positioning mobility device in securement location on vehicle, set the wheel locks or power off, front securement, rear securement, lap</p>	<p>Supervised hands-on training using a demo vehicle with wheelchair securement equipment installed. Supplemental video content as provided.</p>	<p>10 question hands-on quiz and supervised wheelchair securement testing - the driver's performance must be marked down as satisfactory by a PASS trainer on a checklist of common lift operations and</p>

		belt, shoulder belt, test overall securement, passenger communication (all tasks), body mechanics (all tasks)		wheelchair activities.
Improper vs. Proper Securement	Passenger Transportation Drivers (initial training or seeking renewal)	The driver can identify the consequences of improper wheelchair securement, the consequences of proper wheelchair securement, and the importance of not taking shortcuts.	Supervised hands-on training using a demo vehicle with wheelchair securement equipment installed. Supplemental video content as provided.	10 question hands-on quiz and supervised wheelchair securement testing - the driver's performance must be marked down as satisfactory by a PASS trainer on a checklist of common wheelchair securement activities.

Instructional Strategy – PASS Train the Trainer

All PASS Trainers must complete PASS Basic and Full PASS.

PASS 7.0 Excellence in Training Design Document

Topic	Audience	Learning Objectives	Modality	Measurement
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<p>Excellence in Training</p>	<p>PASS Trainers in Training</p>	<p>The trainee can identify the importance of a structured training environment.</p> <p>The trainee can identify the importance of separating training activities from everyday work for better information retention.</p>	<p>2-day Intensive Classroom (Day 1) / 2-day Virtual Classroom</p>	<p>50-question summative assessment at the end of the training</p>
<p>About the Adult Learner</p>	<p>PASS Trainers in Training</p>	<p>The trainee can identify the differences between children and adult learners, authoritative vs. collaborative learning, how adults learn, and adult learning traits.</p>	<p>2-day Intensive Classroom (Day 1) / 2-day Virtual Classroom</p>	<p>50-question summative assessment at the end of the training</p>
<p>Communication Effectiveness when Training</p>	<p>PASS Trainers in Training</p>	<p>The trainee can identify the importance of the following: Acknowledging the mood in the room, learning to say “I don’t know”, building time for the group, minding your own visuals and vocals, maintaining positive energy, active listening, asking questions to a class, how to facilitate communication, and how to foster shared understanding.</p>	<p>2-day Intensive Classroom (Day 1) / 2-day Virtual Classroom</p>	<p>50-question summative assessment at the end of the training</p>

<p>Trainer Characteristics</p>	<p>PASS Trainers in Training</p>	<p>The trainee can identify the proper procedures for setting up a comfortable room, the importance of amenities and equipment, the need to engage all people in a room, have concern for details, being a subject matter expert, how to develop your curriculum, the importance of testing, how to train to proficiency, coaching techniques, and how to be a role model.</p>	<p>2-day Intensive Classroom (Day 1) / 2-day Virtual Classroom</p>	<p>50-question summative assessment at the end of the training</p>
<p>On Being A Trainer</p>	<p>PASS Trainers in Training</p>	<p>The trainee can identify the importance of practice, time management, personalizing your training, group dynamics, being comfortable with silence, dealing with your own emotions, and trusting the audience.</p>	<p>2-day Intensive Classroom (Day 1) / 2-day Virtual Classroom</p>	<p>50-question summative assessment at the end of the training</p>

<p>Training Methods that Work</p>	<p>PASS Trainers in Training</p>	<p>The trainee can identify the tools of training, working with different language levels, location and environmental dynamics, tips on visual aids, multimedia techniques, using games in training, and using case studies.</p>	<p>2-day Intensive Classroom (Day 1) / 2-day Virtual Classroom</p>	<p>50-question summative assessment at the end of the training</p>
<p>Ten Principles for Effective Learning</p>	<p>PASS Trainers in Training</p>	<p>The trainee can identify the following:</p> <ul style="list-style-type: none"> -People learn best when physically and mentally fresh, -People learn best in a non-threatening climate, -People learn better when they know the end use of the skill, -Learning is increased when the learner knows the “whys” of the job as well as the “whats” and hows,” -People learn faster when they know how they are doing, -Stress the “do’s” rather than the “don’ts,” -Work from the known to the unknown, -Don’t talk a “foreign” language, 	<p>2-day Intensive Classroom (Day 1) / 2-day Virtual Classroom</p>	<p>50-question summative assessment at the end of the training</p>

		<p>-Learning increases when a difficult, complex job is broken down into more easily learned pieces,</p> <p>-Manual and muscular skills are best learned by doing.</p>		
Three Important Questions	PASS Trainers in Training	<p>The trainee can identify the following important questions to ask:</p> <p>-Does your agency provide the proper amount and type of training needed by operators (new & veteran) who transport persons with disabilities? By new drivers?</p> <p>-If a new driver was involved in a serious accident on day one, could</p>	<p>2-day Intensive Classroom (Day 1) /</p> <p>2-day Virtual Classroom</p>	50-question summative assessment at the end of the training

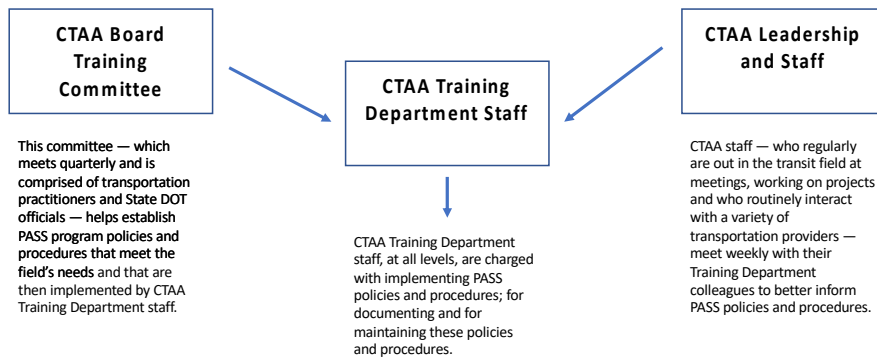
		<p>you defend that they were adequately trained?</p> <p>-In what subject areas do you lack experience, curriculum or resources (e.g., mobility devices, securement board, training technology, etc.) that limit your training?</p>		
<p>Wheelchair Securement Instruction and Demonstration</p>	<p>PASS Trainers in Training</p>	<p>The trainee can identify and demonstrate proper wheelchair securement techniques, can demonstrate the right way of working with people who use mobility devices, and demonstrate the best practices for transporting people with dignity and compassion.</p>	<p>2-day Intensive Classroom (Day 2) / Virtual One on One Instructional Session</p>	<p>Securement Skills Performance Evaluation - Demonstration of Proficiency at Wheelchair Securement Tasks. Each task must be passed by the master trainer to receive a PASS Trainer certification.</p>

<p>Lift/Ramp Operation Instruction and Demonstration</p>	<p>PASS Trainers in Training</p>	<p>The trainee can demonstrate proper Lift and/or Ramp Operation techniques, and how to properly board and deboard individuals who use mobility devices.</p>	<p>2-day Intensive Classroom (Day 2) / Virtual One on One Instructional Session</p>	<p>Securement Skills Performance Evaluation - Demonstration of Proficiency at Wheelchair Securement Tasks. Each task must be passed by the master trainer to receive a PASS Trainer certification.</p>
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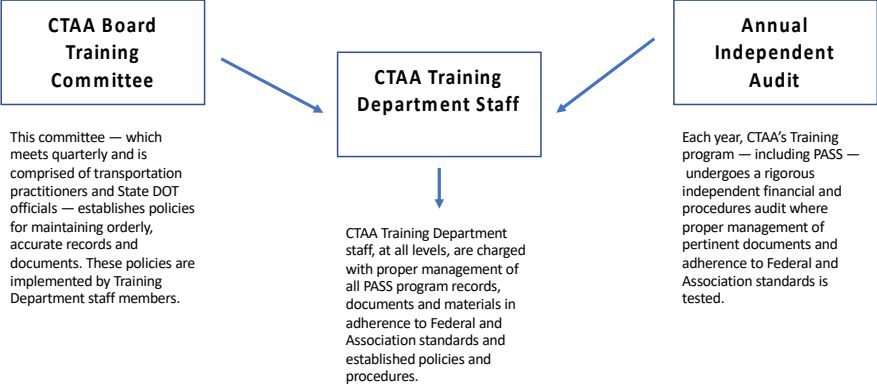
Policies & Procedures

Organizational Charts:

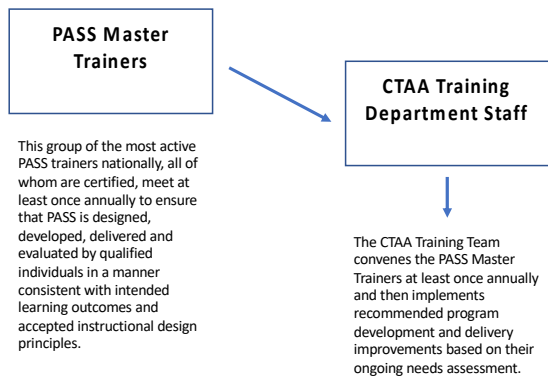
PASS PROGRAM POLICIES AND PROCEDURES



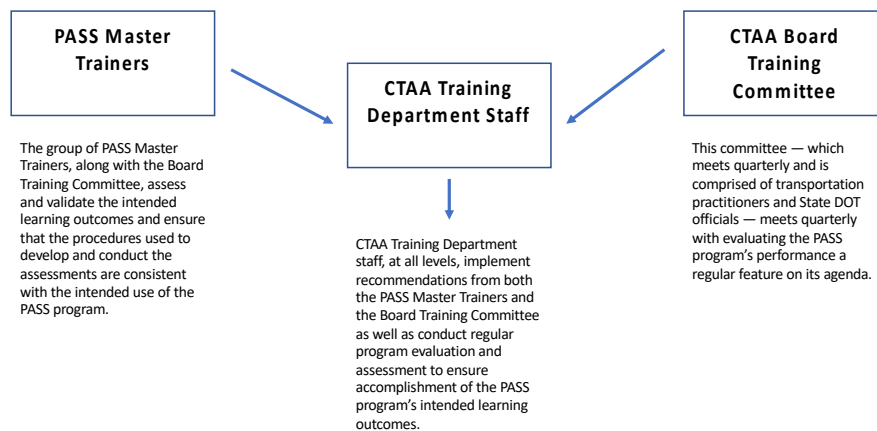
**PASS PROGRAM MANAGEMENT OF PROGRAM RECORDS,
DOCUMENTS, AND MATERIALS**



PASS PROGRAM DEVELOPMENT, DELIVERY, AND MAINTENANCE OF EDUCATION/TRAINING



PASS PROGRAM DEVELOPMENT, CONDUCT AND EVALUATION OF ASSESSMENTS



Overview

The operations policies contained in this section of the PASS Handbook have been written to ensure consistent application to students' participation in the PASS Driver and Trainer program.

It is the responsibility of the Community Transportation Association of America (CTAA) Training Committee to oversee the PASS Program in accordance with these guidelines. CTAA's Deputy Executive Director, Training and Certification programs may be consulted for interpretation or explanation of any of these policies. In certain extenuating circumstances the Training Committee may recommend exceptions to these policies. The administrative support to the Training Committee is the CTAA's Deputy Executive Director for Training and Certification Programs and such other CTAA training department staff, as he or she may designate.

Philosophy

One of CTAA's core values is the belief that professional education and meeting Education standards are essential to the consistent delivery of high quality learning outcomes. This belief is the foundation upon which our training programs are built.

PASS courses are designed for individuals driving passengers who are ambulatory and non-ambulatory to and from destinations in their communities. All courses have a specific number of content hours.

The collaborative team of SMEs, which includes industry experts who are national trainers, brokers, CTAA Board Members, transportation industry Association leaders and consultants develop and annually review the PASS program. They incorporate advances in the field, trainer and students feedback, rules and regulations, the newest techniques and innovative teaching approaches to provide students with the best possible learning experience.

CTAA is committed to this philosophy in developing and implementing all of our education programs. PASS Basic, Full PASS, and PASS Trainer curricula and materials are copyrighted.

Statement of Policy

It is the policy of the Community Transportation Association of America (CTAA) that all students taking the PASS Program be treated fairly and equitably without regard to race, color, creed, religion, sex, age, physical disability, national origin, ancestry, marital status or family responsibilities, personal appearance, sexual orientation, matriculation, or political affiliation. In addition, CTAA will comply with local, state and federal laws and regulations.

CTAA supports the concept of offering certification to members and non-members of CTAA with participation open to any practitioner that can successfully complete the PASS training program. This approach benefits the development of the association, signifies that certification is freely accessible to any qualified practitioner, and encourages involvement on the part of all individuals. CTAA recognizes the powerful and changing field dynamics of the transportation industry and will work to continually update the PASS Program as necessary, as well as, foster recognition and wide acceptance of the PASS Program.

Special Accommodation Requests

If an individual requires special accommodation to access a PASS class, the request should be made to CTAA or the relevant Master Trainer in the event of Virtual PASS Trainer classes. For in-person PASS Classrooms, it is the responsibility of the hosting agency to respond to the individual's specific needs.

PASS training can be held anywhere a participating agency wants to hold the training course. Therefore, if there is an accommodation request for the physical training environment, hosting agencies are expected to comply with CTAA's Statement of Policy, above, to treat its participants fairly and equitably. If there are any question, participants can contact CTAA with for assistance or clarification about accommodating requests.

Qualifications

Below are the positions and qualifications necessary for participants in the PASS Program:

CTAA Board of Directors:

Members of CTAA's Board are elected from industry leaders by CTAA's membership. Board Members provide oversight and guidance to the organization as a whole, and are considered Subject Matter Experts in the field of Community Transportation, and may serve as Master Trainers.

Eligibility

Regional and National members shall have been members of the Association for twelve (12) months at the time of their nomination. To the extent possible, National members of the Board should reflect the membership categories of the Association. Members of the Board shall be actively engaged in one or more of those membership categories.

Training Committee Membership:

CTAA's Training committee consists of members of the nonprofit's Board of Directors. Members of the Board's Training Committee are selected to serve in an advisory role to CTAA's training staff as well. As leaders in the community transportation industry, they leverage their unique understanding of the industry they are part of to help select SMEs (subject matter experts), and keep CTAA informed of any unique issues or challenges in the industry that could be addressed through developing training courses or amending an existing training program. The Training Committee's responsibilities go beyond just PASS: They also oversee CTAA's development of online self-directed courses and virtual classrooms on a wide array of topics.

CTAA Administrative Staff:

CTAA's Training Staff positions, described below, are responsible for the day-to-day operations of the PASS Program:

Deputy Executive Director, Training and Certification Programs

Assesses Association-wide training needs to drive learning and development initiatives. Identifies and arranges suitable training solutions for the community transportation industry. This individual directs the training team, and plans, implements and executes innovative and high-quality training and certificate courses in a variety of formats. Oversees the conceptualization and delivery of online professional learning.

Responsibilities:

- Directs department administration and management, including budget development and management and supervision of staff and contractors.
- Provides strategic direction by analyzing industry needs and best practices.
- Establishes direction and performance criteria for training and certificate programs, products, and services.
- Appropriately leverages expertise and experience to provide quality services.
- Leads in the development and support of the Association's PASS training, certification, and certificate programs, its implementation, and in assessment of the achievement of its objectives.
- Provides leadership and accountability by integrating the Association's mission and strategic vision to all aspects of training and certificate programs.
- Provides oversight for training and certification curriculum development, media production, and course creation for the training division and CTAA EXPO.
- Defines and implements comprehensive strategies to increase marketing visibility and assess effectiveness of traffic across all social media platforms.
- Provides sound decision-making in alignment with the activities of the training and certificate program department to meet the Association's needs, goals, and initiatives.
- Develops budget and monitors income and spending against the departmental budget while completing complex projects on deadline and on budget in conjunction with day-to-day activities.
- Stays abreast of laws, regulatory requirements, current trends, techniques, methods, and skills appropriate to delivering training programs and software advancements.

Qualifications:

- Bachelor's Degree required
- 5 years of experience conceptualizing and developing online learning trainings and courses
- 5 years leading a total quality management development and production team

- Experience with eLearning content software
- Experience working with video production and editing
- Experience with tools for social media design and content management

Training and Certificate Program Manager (2 Employees)

Develops and administers training and certificate programs. Reaches out to the community transportation industry to assess training and development needs for organizations while monitoring training for relevancy and effectiveness to execute innovative, high quality training and certificate programs both in the classroom and through online professional learning.

Responsibilities:

- Provides oversight to PASS and other training programs that include classroom, online and web-based courses, printed manuals, group sessions, training videos, and more.
- Identifying, reaching out, and responding to training needs and requirements for an organization or group.
- Reviews existing training materials produced by third parties to determine appropriateness and relevance.
- Oversees in-person and online training sessions while reviewing and evaluating the qualifications of all instructors.
- Schedules training sessions, organizes information technology and other equipment, and manages course enrollment.
- Monitors all training programs and materials to ensure that they are effective and up-to-date for content while incorporating the appropriate technology to ensure course relevance.
- Manages costs for all programs, productions, and publications in order to report to organization executives regarding a return on investment.
- Explore new training courses by keeping current on the activities and needs of the community transportation industry including monitoring the content presentations at transit conferences and seminars.
- Maintains understanding of new educational and training techniques and methods.
- Assesses the monthly budget billing process including assessment of revenues and expenses.
- Monitors and updates content on training web pages while increasing marketing visibility of traffic on social media platforms.
- Meets billing financial standards while maintaining positive external and internal customer relations by: Ensuring timely and accurate billing, monitoring payments, identifying variances, and making required changes and updates.

Qualifications:

- Bachelor's Degree required
- Responsive customer service attitude

- Ability to work on multiple projects and coordinate the support network of multiple training courses.
- Experience with eLearning content and video production
- Written and verbal communication skills
- Interpersonal communication, problem solving, and critical thinking skills
- Planning and time management skills
- Attention to detail and the ability to make critical decisions

Database and Customer Care Coordinator

The responsibilities for this position includes an open space environment with both in-person office responsibilities and telework. This individual reports to both the Membership Director and Deputy Director.

Responsibilities:

Training Software, Database Management, and Metrics:

- Technical support for CTAA's Learning Management System (LMS).
- Technical support for CTAA's Membership and Training database to support connection between LMS and software programs.
- Reply daily to all PASS certificate requests, certificate name changes, and email name change requests.
- Technical support for Virtual classroom training courses.
- Technical support for online tests for all certificate programs.
- Evaluates and identifies what processes can be automated and simplified to bring the best customer experience.
- Provides monthly training reports providing a total number of learners trained for all courses.
- Manages all aspects of entering new courses into the LMS to ensure certificates are emailed to all students.

Customer Engagement, Recruitment, and Retention:

- Develops and fosters a sense of community for members by providing exceptional customer care and response.
- Answers membership inquiries by email and telephone, provides follow-up as necessary, and logs all interactions.
- Assists in assessing member benefits.
- Identifies lapsed association members and develops individualized retention plans.
- Actively solicits new members into the association by identifying qualified prospects through lead generation.

Database Membership Management and Metrics:

- Manages all aspects of CTAA's membership database, including the updating and maintaining of membership records and lists.
- Regularly maintains and updates email distribution lists for membership and marketing campaigns.
- Serves as the initial point of contact for membership and then escalates member questions as appropriate to others.
- Manages the integrity of the membership database and, in collaboration with the Member Services Director, ensures it is current.
- Inputs data into CTAA's membership database, setting guidelines and procedures to ensure information is accurate and current.

Training Software and Database Management:

- Technical support for CTAA's Learning Management System (LMS).
- Technical support for CTAA's Membership and Training database to support connection between LMS and software programs.
- Reply daily to all PASS certificate requests, certificate name changes, and email name change requests.
- Technical support for Virtual classroom training courses.
- Technical support for online tests for all certificate programs.
- Evaluates and identifies what processes can be automated and simplified to bring the best customer experience.
- Provides monthly training reports providing a total number of learners trained for all courses.
- Manages all aspects of entering new courses into the LMS to ensure certificates are emailed to all students.

Qualifications:

- Bachelor's degree in Computer Science, Information Technology, Communications, Marketing, Business Administration, or related area.
- Associate's degree with commensurate working experience working with database and customer service programs.
- At least 4 years of experience with nonprofit or membership associations to include customer service and database programs.
- Great communication skills. Understanding of the importance of tone and how to communicate clearly, whether in email, over the phone, or face-to-face. Excellent written and verbal presentation skills.
- Strong focus on exceeding customer expectations.
- Experience building and maintaining different types of data within a master database.
- Ability to work with two supervisors.

- Time and work process management skills combined with the ability to work independently.
- Math and reasoning skills.
- Excellent organizational skills and attention to detail.
- Previous sales experience preferred.
- Administrative and data entry experience required.
- Proficient with Microsoft Office Suite or related software.

Training Coordinator:

Identifies and monitors training needs in the organization. Designs, plans, and implements training programs, policies, and procedures to fulfill those needs.

Responsibilities:

- Reviews existing training programs including PASS; suggests enhancements and modifications to improve engagement, learning, and retention in order to meet the changing needs of clients, the organization, and the industry.
- Works with CTAA's Learning Management System (LMS) platform and membership and training database to ensure continuous operation of platforms.
- Ensures timely and accurate entry of testing and trainer data.
- Maintains knowledge of new methods and techniques for training and training requirements applicable to the organization and the community transit industry.
- Sets up Zoom meetings for training events, serving as the host, and assisting attendees with technology related issues.
- Works with CTAA's webmaster to ensure training information remains current on the training page.
- Establishes and maintains continuous contact with trainers and customers regarding the status of training classes.
- Reconciles financial statements and reports for classroom and virtual courses.
- Identifies problems and opportunities such as operational changes and industry developments that training could improve or take advantage of.
- Coordinates with CTAA Directors and staff to arrange employee registration for and participation in outside training programs.
- Ensures that training milestones and goals are met while adhering to the approved training budget.

Qualifications:

- Bachelor's degree in Communications or related field required.
- At least two years of experience working with training programs.
- Excellent verbal and written communication skills.
- Thorough understanding of standard training processes.
- Ability to moderate large groups.

- Exceptional organizational skills and attention to detail.
- Proficient with Microsoft Office Suite or related software.

PASS Master Trainers:

PASS Master Trainers are the program's Subject Matter Experts. These exceptional individuals are selected from the most knowledgeable and dedicated contingent of CTAA's current population of PASS Trainers, as well as the CTAA Board of Directors.

There is no limit or requirement to the number of Master Trainers active. CTAA selects Master Trainers from the population of PASS Trainers as necessary. At present there are 26 Master Trainers on CTAA's rolls.

PASS Master Trainer:

Responsibilities:

Conducts PASS Trainer courses in order to train and certify new PASS Trainers. Orders copyrighted PASS testing materials, works with their employing organization or independently to create a classroom and environment conducive to learning. Arranges the use of a transit vehicle for training in the boarding and deboarding of people using assistive devices.

Participates in annual review meetings with fellow Master Trainers to further develop, update, and review the PASS program. Provides input and industry insights in order to guide the development of new versions of PASS. Provides CTAA staff with support by acting as a Subject Matter Expert (SME) in transit and instructional design.

Qualifications:

- Over 7 years of experience in providing training to Community Transportation providers.
- History of providing at least 10 PASS Training Workshops, which includes PASS Basic and Full PASS every two years during their tenure as a PASS Trainer.
- Active monitoring of Community Transportation industry standards.
- Active monitoring of changes and amendments to ADA and other transit-related requirements.
- Attendance at all Master Trainer meetings, including the annual review of the PASS Program.

PASS Trainers:

Conducts PASS Training activities, defined as 2-day PASS Classrooms and/or Half-Day Wheelchair Securement classes. Orders copyrighted PASS testing materials, works with their

employing organization or independently to create a classroom and environment conducive to learning. Arranges the use of a transit vehicle for training in the boarding and deboarding of people using assistive devices. Delivers training as developed by PASS Master Trainers. Employs techniques learned in PASS Train-the-Trainer to successfully engage and bring the best out of adult learners.

PASS Trainer:

Responsibilities:

- Conducts PASS Training Classes in accordance with CTAA's Code Of Conduct and Standards of Professionalism.
- Ensures all trainees are trained to proficiency.
- Orders PASS Materials from CTAA in order to conduct PASS training activities.

Qualifications:

- Meets all federal and/or state qualifications for employment as a vehicle operator in their jurisdiction.
- Self-selection or selection for the role of Trainer by employing organization.
- Successful completion of CTAA's PASS Basic Online course.
- Completion of Techniques for Training PASS.
- Completion of a CTAA PASS Train-the-Trainer workshop in a classroom or virtual environment.
- Successful demonstration of proficiency at wheelchair securement, instructional techniques as presented.

Driver/Operator:

Drivers, also known in the transportation industry as Operators, are the primary recipients of PASS Training. These individuals are the front line employees in any organization providing transportation services to their communities.

Driver/Operator:

Responsibilities:

PASS Drivers/Operators are responsible for engaging fully with the training materials presented, internalizing the content, and working with their PASS Trainer to attain proficiency in all aspects of the material presented.

Qualifications:

- Meets all federal and/or state qualifications for employment as a vehicle operator in their jurisdiction.
- Selection by a transportation provider to undergo PASS Training.

IMPORTANT NOTE: As of present, there have been no changes in eligibility requirements for inclusion in the PASS Program.

Training Course Development and Maintenance

CTAA's training activities directly follow the needs of the community transportation industry. Every training CTAA develops is created upon request from CTAA's Board of Directors and membership of over 1,500 transportation organizations. Of these training programs, PASS is the longest-running and has the full support of CTAA's membership, Board of Directors, and community transportation industry as a whole.

The ongoing development and maintenance of PASS takes place during annual meetings between CTAA Staff and PASS Master Trainers, under the oversight and governance of CTAA's Board of Directors and Training Committee. During this meeting, the above participants discuss the state of the industry, the prior year's training numbers, and the currency and accuracy of the PASS Program. The annual meeting culminates with a line-by-line analysis of the training content of PASS. During this analysis, CTAA's staff and Master Trainers determine whether the current version fulfills the intended learning outcomes (ILOs) of the PASS Program, and whether any changes in purpose, scope, or content are required. In the event that any such changes are required, CTAA staff records the required change and passes the information to a SME who is retained specifically for developing the next version of the PASS Program.

The PASS Program is updated to a new version every **3 years**. During this version upgrade, all changes agreed upon by the Board of Directors are incorporated into the new version. Once the new version of PASS is published, CTAA provides a grace period of 3 months, where transportation providers may submit any remaining purchased tests from the old version of PASS before adopting the new version.

In the event that legislation is passed or new technology is developed that requires immediate changes to the content of PASS, these changes are rushed into the current version of the program and distributed to all PASS Trainers.

Delivery of PASS Training

Elements of the PASS Program are delivered in one of three methods: Self-Directed Online Training, In-Person, and Virtual Training.

Self-Directed Online Training:

Two elements of PASS are taught through online, self-directed training on our online school. This online school is hosted by a learning management system called Northpass. These online courses are the following:

Techniques for Training PASS, a video lecture by PASS Master Trainer Michael Noel. This course is required before attending a PASS Train-the-Trainer classroom.

PASS Basic, a seven-module online course that teaches the Safety and Sensitivity content of PASS. This course's certificate serves as both a standalone training as well as a prerequisite for obtaining a PASS Trainer Certificate or a Wheelchair Certificate. Drivers who will only be required to transport ambulatory passengers are not required to undergo further training unless their responsibilities change to include the transport of individuals with mobility assistance devices.

In-Person Training:

The training required for the Full PASS Certification must take place in person, under the supervision of a PASS Trainer. This can take place in either a 2-day PASS Classroom, or a Half-Day Wheelchair Securement Classroom:

The 2-day PASS Classroom is an in-person learning environment where both the Safety and Sensitivity and Wheelchair Securement components of PASS are taught by a Trainer. A PASS Basic Certificate is not issued as part of this class. Individuals who complete this training receive a PASS Wheelchair Certificate.

Any holder of a PASS Basic certificate can receive Wheelchair Securement training through an in-person Half-Day Wheelchair Securement class if completed **within 90 days** of receiving their PASS Basic Online certificate. Individuals who complete this avenue of training receive a Wheelchair Certification that is equivalent to that received from a 2-day PASS Classroom.

PASS Trainer is offered in a 2-day classroom environment as well as a Virtual training. The 2-day training is an in-person classroom conducted by a Master Trainer which covers all aspects of the PASS Program as well as techniques for instructing adult learners. PASS Trainers must also demonstrate proficiency in wheelchair securement techniques in-person to receive their PASS Trainer certification.

Virtual Training:

CTAA offers PASS Trainer as a virtual classroom as well as in-person. This version of the PASS Trainer curriculum is taught remotely by a PASS Master Trainer, and consists of a 2-day virtual classroom, combined with a one-on-one session with the Master Trainer to go over instructional techniques and wheelchair securement. The wheelchair securement training in

CTAA's Virtual training environment is performed on the wheelchair securement equipment onsite at the trainee's facility, with the Master Trainer observing and advising remotely via an online meeting platform.

Course Completion Requirements

Course Completion:

Successful completion of each separate course is defined as the student having:

- Attended the course (PASS Basic, Full PASS, or PASS Trainer).
- Adhered to course content and demonstrated all practical skills outlined in the course materials.
- Achieved the passing score for the course.

It is the policy of CTAA that participants in the PASS Program train to proficiency, as defined in this Handbook's Glossary of Terms.

Translating this principle to our assessments, it has been determined that a score of 80% or higher on our multiple choice and true/false assessments is indicative of proficiency. The reason our threshold for passing is not 100% is because many of our exam questions are complicated by the rules surrounding the ADA. A good example of this complicated nature is demonstrated by Question three on our wheelchair securement quiz:

(True or False) A passenger may ride the lift while facing the vehicle.

The answer to the above question is True. However, situating a passenger on the lift facing the vehicle is not considered a best practice, and has been acknowledged by the community transportation industry as being unsafe. In spite of this, however, the Americans With Disabilities Act allows a passenger using a mobility device to refuse to be placed on the lift facing away, in the "proper" position. The ADA compels transportation providers to treat all passengers equally. Much like a passenger without a mobility assistance device could decide for some reason to climb up the stairs backwards into the vehicle, a passenger with an assistive device must be treated as an autonomous human being instead of cargo, and this includes accommodating requests that may be considered suboptimal in terms of safety. This also extends to the securement of wheelchairs and other assistive devices – a transportation provider can not refuse to transport a passenger in a wheelchair simply because their wheelchair is not designed to be secured in a vehicle. In these cases, a transportation provider is required to do their best to secure the device, no matter its fitness for securement.

Knowing the above, it is still standard practice to recommend that passengers face away from the lift when boarding the vehicle. As such, a number of drivers will answer Question 3 as False. From a safety standpoint, this is correct. From a legal standpoint, this is incorrect.

We at CTAA know that vehicle drivers/operators are generally not lawyers. Nor are they required to be by their organizations. While the content of PASS explains ADA requirements, the operator may be explicitly instructed by their agency to discourage unsafe practices by passengers using assistive devices as much as possible while being careful not to undermine their civil rights. In these cases it is perfectly reasonable for the driver to answer the above question as False, due to their organization's policy. CTAA has determined that issues like these are not sufficient grounds for failing a driver's exam. This is the reason we have settled on 80% as an indicator of proficiency – such a score shows that the participant understands the fundamentals behind the training, if not all of the legal details.

Securement Skills Performance Evaluation

The principle of training to proficiency is also applied to PASS Wheelchair Securement testing. Unlike the multiple choice or true-false assessments, proficiency is a simple matter of ensuring that the training participant can fully execute each aspect of wheelchair securement correctly, without assistance. Once this level of understanding is accomplished and demonstrated, the trainer will check the box next to the specific activity and initial the line item. The trainer will continue to instruct on any aspect of the wheelchair securement process the participant is unable to complete independently until demonstrated proficiency is achieved.

Class Formats

PASS classes may be offered in one of these formats:

- Traditional in-person, face-to-face in the classroom.
- Online, where the class offered in a self-paced format.
- Virtual, where the course is offered through an online meeting platform.

Grading of PASS Exams

A. PASS Online Driver and Trainer classes are scored by a combination of NorthPass Learning Management System (LMS) and Skyward Thought software.

B. Achieving an overall score of 80% on the multiple choice and true/false components of PASS tests is considered a passing grade.

C. Upon successful completion of the PASS online or classroom exam the PASS Trainer or PASS Driver is emailed the certificate.

Notification of Passing or Failing the PASS Driver and/or Trainer Exam

A. Applicants must receive a passing score of a minimum of 80% in each of the modules.

B. PASS Online Driver and Trainer students are immediately notified if they passed or failed the course.

Applicants Who Need to Re-Take All or Parts of the Exam

A. Students may re-take the sections they did not pass.

B. Online retakes of the PASS Driver and Trainer exam will occur upon review by the CTAA staff who will approve to reset the exam to the beginning of the test.

C. Classroom Trainers and Drivers exams are emailed to CTAA to be graded within two business days. The PASS Trainer is contacted if a student fails the exam to be retrained and then retake the entire exam. Upon successful completion of the exam the PASS Trainer or PASS Driver is emailed the certificate.

Recognition

Upon successful completion, the recognition for PASS Drivers is valid for two years. The recognition for PASS Trainers is valid for three years. A certificate is provided upon successful completion and is emailed at the end of the course.

Classroom Policies

Trainer Requirements

The maximum Master Trainer to PASS Trainers ratio is 10 students for virtual PASS Trainer courses and 25 students for the traditional in-person PASS Trainer and Driver courses. Only PASS certificate-holding Trainers are authorized to instruct the PASS Basic and Full PASS course.

Equipment and Supplies

Required equipment, such as wheelchairs, transit agency or NEMT vehicles, factory certified wheelchair locks and belt loops and any additional required supplies and equipment as listed in the current edition of the PASS Trainer manual can be used to instruct the course.

Evaluation Tools

The PASS Master Trainers are SMEs who develop the PASS Driver and Trainer exams. Current versions of the exams are provided to PASS Trainer certificate holding Trainers via a secured access portal.

PASS courses include a course summary evaluation to be completed by the student and trainer at the completion of the course.

Online Course Administration System

The online course administration system is accessed by the certified PASS Trainer through the use of the CTAA secured online system. This access allows a PASS Trainer to verify the status of the PASS Driver before they can access the Full PASS Securement Skills Performance Evaluation and Driver test.

The online access ensures that each individual student information is registered which requires submitting the PASS Basic certificate number and email address.

Website

Information about CTAA's PASS Driver and Trainer programs are located in the Training Information section on CTAA's website.

Quality Assurance

CTAA works to ensure there are no deficiencies in PASS records by maintaining a close relationship with agencies seeking PASS training. If a potential deficiency is identified by an outside organization or internally, it is handled through the following procedure:

1. CTAA's Training Team is informed of the deficiency, either by CTAA Staff or another organization. All communications on the topic of Quality Assurance are tracked by CTAA's email service. The Training Staff records as much information about the deficiency as possible, and informs the stakeholder (if any) that we will initiate our fact-finding process to determine if there is in fact a deficiency, and to what extent.
2. CTAA's Training Team will initiate fact-finding activities to track the nature of the deficiency. The Staff will check CTAA's Database, the Learning Management System, Email Records, Transactions, and Financial Records to identify the nature of the potential deficiency and ascertain what happened.
3. CTAA will examine the facts found and verify them for accuracy, then discuss the investigation and outcome with the entire Training Staff.
4. CTAA will report to the individual or organization who alerted CTAA to the deficiency. CTAA will report on the facts as found by the Staff as well as the actions that will be taken.
5. If required, the individual or organization that found the deficiency will have the opportunity to appeal and provide information and documents from their records. CTAA will integrate these records into their fact-finding process and re-examine them as necessary.
6. Once the appeals process, if any, is completed, CTAA will make a final QA decision.

7. Actions will be taken by the Training Team to address any deficiencies identified, based on CTAA's QA procedure.

Governance

A. The Training Committee is composed of five CTAA Board of Director members and one PASS Master Trainer who is a Board Member while serving on the Training Committee. The Training Committee supports the development and guidance of the PASS certification program to ensure the uniformity and equity of the PASS certification program on a continuing basis.

Responsibilities of the Training Committee:

A. The Training Committee:

1. Conducts a review of any questions or protests raised by learners. Actions taken in the name of the Training Committee shall be by a majority vote.
2. All Training Committee efforts will be coordinated by the CTAA Board of Directors through a CTAA Board Member who is acting as a PASS Master Trainer. The Training Committee is staffed by the appropriate CTAA Training Department staff members.

Appeals Process

A student may appeal by email or in writing to the Training Committee, which is composed of CTAA Board Members and a Master Trainer for review of the students complaint and the determination of the final decision to the students appeal.

Overview of the Appeals Process

- A. A decision affirming an action and decision shall be made by a majority vote of the Training Committee. From the date that the appeal is received by the Training Committee, the Committee has 10 business days to review the submitted information.
- B. The Training Committee shall notify the student of the time and place of the Appeals Process meeting and provide the opportunity for the student to appear in person, by Zoom or another social media platform and/or telephone to the Training Committee meeting for any defense or explanation before action is taken by the Training Committee meeting.
- C. If the student does not agree with the decision made by the Training Committee their final appeal is to the CTAA Board of Directors.

D. The decision of the CTAA Board of Directors shall be final in the matter under consideration.

Responsibilities and Code of Conduct for Trainers and Master Trainers

Code of Conduct and Standards of Professionalism for Trainers

1. All PASS Trainers will project themselves in a professional manner at all times during the training of the PASS curriculum.
2. All PASS Trainers must use the copyrighted PASS curriculum including the manual, test, answer sheet, and evaluation form.
3. PASS Trainers are representing CTAA, as well as themselves, and they are held to a high standard of professionalism at all times.
4. PASS Trainers must maintain high standards of integrity and competence.
5. PASS Trainers must maintain independence and objectivity in their professional activities.
6. PASS Trainers must not knowingly make any misrepresentations relating to training, recommendations, actions, or other professional activities.
7. PASS Trainers must not engage in any professional conduct involving dishonesty, fraud, or deceit or commit any act that reflects adversely on their professional reputation, integrity, or competence.

Master Trainer Responsibilities:

- A. A PASS Master Trainer is a national subject matter expert in passenger assistance and safety requirements. Master Trainers conduct thorough needs assessments and are responsible for content development and determine specific learning objectives for the PASS Driver and Training certification courses.
- B. Master Trainers are required, at a minimum, to have trained at least 10 PASS Trainer workshops during a two-year period and must continue to train this number of Trainer workshops every two years.
- C. The PASS Master Trainer leads the training of the PASS Trainer curriculum to all PASS Trainers.

Code of Conduct for Master Trainers

The Community Transportation Association of America views the PASS training program as the nation's premier educational effort to ensure quality transportation services for people with disabilities. PASS is more than a training program, it is a responsibility. In maintaining this important role, the management of CTAA's training efforts has developed this code of conduct, which will provide standards for all PASS Master Trainers.

PASS Master Trainers will conduct themselves in a professional manner as befitting those providing valuable education and leadership to those participating in PASS training. It is expected that Master Trainers will exercise honesty, integrity, and fairness in their dealings with any persons or organizations participating in PASS training. All communications, verbal and otherwise will be similar to those found in traditional business and educational organizations. Additionally, Master Trainers will also abide by the following criteria:

1. PASS Master Trainers are expected to recuse themselves from any activity that has or appears to have a conflict of interest, financial or otherwise, that would prevent them from acting in the best interests of the PASS training program or CTAA.
2. PASS Trainers will adhere to the standards of the anti-discrimination provisions of the Civil Rights Act and all relevant related regulations.
3. All classes must be scheduled by CTAA. The trainer may not schedule a class on their own. Each trainee must receive an original PASS manual, test, answer sheet, and evaluation form. The copying of materials is not permitted without the written consent of CTAA.
4. At the conclusion of each class the trainer must collect all answer sheets, tests, and evaluation forms, make copies for their own records, and forward the originals to CTAA within 3 business days of completion of the class.
5. To be properly reimbursed for costs deemed appropriate by CTAA, documentation is required. It is the responsibility of the trainer to collect receipts for all expenses incurred for the conduction of the training session. Trainers are expected to refrain from the consumption of alcohol while in the employ of CTAA. Alcohol is not a reimbursable item.
6. Original receipts must be provided – please attach to individual sheets of paper with scotch tape and separate by item (e.g., food, gasoline) as listed on the expense report.
7. Trainers will be reimbursed at the rate determined by CTAA that reflects the cost of providing their services at the designated training location.
8. If the trainer used CTAA wheelchair securement training aids or other like materials provided by CTAA, it is the responsibility of the trainer to return this item via FedEx to CTAA immediately following the end of the training class. This is an allowable expense, therefore, be certain to obtain a receipt and include it in the expense report.
9. Business casual attire is required of the trainer when presenting.
10. All PASS Master Trainers will receive a copy of these criteria upon appointment, to be signed and dated.

Verification of PASS Certificates

Organizations and individuals who wish to check the authenticity of a certificate may submit a certificate verification request by email or via an online form.

To ensure the authenticity of certificates, as specified in the CTAA (PASS) guidelines, the training team uses the following procedure:

In order for a certificate to be valid, the trainer must have only used CTAA-generated, copyrighted PASS training materials. All certificate documents are issued by CTAA.

If a broker or other interested party wishes to have a certificate confirmed as valid, a validation request is submitted via an online form served to the requestor. This form is designed to take in the certificate holder's information as well as any supporting documents, such as a copy of the certificate received from the driver being validated. A team member will check the account database and confirm the certificate holder's status. The team member checks the following data points: The expiration date and the certificate number. The submission is reviewed alongside all supporting documents submitted with the request, such as the participant contact information, prerequisite certificate number, and the document presented. A response is sent within 72 hours of receipt.

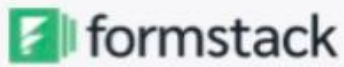
The below images are examples of a PASS Certificate Verification:

Subject: PASS Certificate Verification Request Form

Date:

From:

To:



Formstack Submission For: [PASS Certificate Request Form Brokers](#)

Driver's Name:	[REDACTED]
Specialist Requesting Certificate :	[REDACTED]
Agency/Company:	[REDACTED]
Specialist Email:	[REDACTED]
Verify Authenticity of the Document:	Yes
Request Basic Online Document:	Yes
Request Wheelchair Securement Certificate:	No
Provide Basic Online/Wheelchair Securement Number:	[REDACTED]
UPLOAD Wheelchair Securement Certificate:	
UPLOAD Basic Online Document:	View File
Additional Comments:	

[Redacted]

Subject:

Date:

From:

To:

CC:

Attachments:

[Redacted]

The attachment appears to be printer issue with color. The document is valid.

Attached is the CTAA (PASS) Trainer certification valid through [Redacted] under [Redacted], certified in both sensitivity skills training and wheelchair securement training.

If you need additional assistance, please email our training team at rideshare@ctaa.org. Office Hours 9:00am-4:30pm (M-F) EST

If you wish to request a copy of a certificate, click [Certificate Request Link](#).

Sincerely,

[Redacted Signature]

For training materials or workshops, go to <https://ctaa.org/training/>.

----- Forwarded message -----

From:

Date:

Subject:

To:

[Redacted]



Formstack Submission For: [PASS Certificate Request Form](#)

Violations

In the event that a participant in the PASS program misrepresents their identity or eligibility, gives or receives unauthorized assistance on an assessment, or implies the PASS certificate's purpose is beyond that specified here in the PASS Handbook, or engages in other violations of standard policies:

1. CTAA staff will investigate the situation, and collect facts from all stakeholders.
2. Upon completing the investigation, a determination will be made whether the violation was a purposeful attempt to deceive or due to stakeholder error.
3. If the violation took place due to stakeholder error, the violation will be corrected and CTAA staff will work with the participant to ensure that the course elements in question are completed properly.
4. If the violation is deemed to be a purposeful attempt to deceive or cheat the PASS program, any and all related certificates will be removed from the database and their employer or broker will be informed of the incident. Depending upon the nature of the violation the participant will either not be eligible for PASS training, or will have to retake their PASS training from the beginning to receive a new certificate.

Standard Operating Procedure for Updating Electronic Records

PASS Basic

PASS Basic records are handled through CTAA's Learning Management System. Upon successful course completion, the participant's name and email address is posted to CTAA's Training and Certificate Database.

If a correction to the record of a PASS Basic holder is required, they are instructed to send an email to records@ctaa.org containing the original information as posted initially, as well as the required corrections. Once this is received, CTAA staff updates both the database and learning management records of the participant.

Full PASS

All assessments for the PASS 2-day Classroom are graded and recorded using CTAA's Learning Management System (LMS). Upon completion of the classroom, the PASS Trainer sends a scanned copy of the class's assessments to records@ctaa.org. CTAA's Staff adds the relevant information to CTAA's Database, creating a record if none exists. The assessment itself is fed through the back end of CTAA's Learning Management System, recording the test answers and grade into the LMS's records. The LMS will pass the test information to the Database in the event of a passing grade, adding a wheelchair certificate to the participant's record. CTAA's staff also collects the City, State, and ZIP Code of the participant, as well as their employing organization, creating a record of the organization if none exists.

PASS Trainer

All assessments for the PASS Trainer are graded and recorded using CTAA's learning management system. Since all participants in PASS Train-the-Trainer already possess a PASS Basic certificate at the time of assessment, records will already exist in CTAA's Database for

each participant. The assessment itself is taken online through CTAA's Learning Management System by the participants, recording the test answers and grades into the LMS's records while doing so. The LMS will pass the test information to the Database in the event of a passing grade, adding a wheelchair certificate to the participant's record. CTAA's staff also collects the Address, City, State, Phone Number, Email and ZIP Code of the participant, as well as the details of the employing organization, creating a record of the organization if none exists.

Important Note: CTAA does not maintain paper records of our certificates. CTAA does not dispose of any electronic records.

CTAA's Disaster Recovery Plan outlines the policies and procedures around data retention and data breaches.