

Guidance on How to Use This Manual

This guidance document has been prepared to assist users in effectively implementing and maintaining the RTMS Toolkit Manual and the accompanying supporting records, registers, schedules, procedures, and templates supplied together with the manual. The purpose of the toolkit is to provide transport operators with a practical and user-friendly framework for managing road safety, legal compliance, operational risks, and continual improvement in line with RTMS requirements.

1. Purpose of the Manual and Supporting Records

The RTMS Toolkit Manual is designed to help organizations establish and maintain a structured transport safety management system.

The manual, together with the accompanying records and templates, assists companies to:

- Promote road safety throughout their operations
- Improve compliance with road transport legislation
- Reduce operational and transport-related risks
- Improve driver and vehicle safety
- Monitor transport performance
- Maintain objective evidence of implementation
- Support RTMS audit readiness and continual improvement

The toolkit has been intentionally designed to be practical and easy to implement for transport operators of various sizes and operational complexities.

2. What is Included in the Toolkit

The toolkit consists of two main components:

2.1 The RTMS Toolkit Manual

The manual outlines:

- Company commitments
- Operational controls
- Policies and procedures
- Safety processes
- Management responsibilities
- Driver responsibilities
- Monitoring and improvement requirements

The manual provides guidance on what the organization is required to implement and maintain.

2.2 Supporting Records, Registers and Templates

The toolkit also includes supporting documentation referenced throughout the manual, including:

- Registers
- Checklists
- Schedules
- Policies
- Procedures
- Monitoring reports
- Training records
- Risk assessment templates

These records are intended to help the company demonstrate implementation and maintain evidence of compliance.

Examples include:

- Fleet Lists
- Vehicle Licensing Schedules
- Trip Mass Records
- Risk Assessments
- Accident Registers
- Vehicle Maintenance Schedules
- Tyre Management Records
- Driver Medical Schedules
- Training Records
- Safety Performance Reports

The records supplied with the manual should be customized to suit the company's operations and implemented as part of normal daily activities.

3. How to Use the Manual

The manual should be used as a working operational document and not simply as an audit file.

Recommended Approach

Step 1 – Review the Entire Toolkit

Management should review:

- The manual
- All supplied records and templates
- The policies and procedures
- The operational requirements

This allows the company to understand how the different parts of the toolkit work together.

Step 2 – Customize the Toolkit

The toolkit contains example wording and placeholders that must be updated to reflect the company's actual operations.

The following should be customized:

- Company name
- Logo
- Depot/site information
- Fleet information
- Operational procedures
- Responsible personnel
- Loading methods
- Risk-specific controls

Any references to “XXX Transport (Pty) Ltd” should be replaced with the company's actual details.

Step 3 – Implement the Processes

The manual outlines the transport safety processes that should be implemented within the business.

These include:

- Vehicle licensing management
- Load management
- Risk assessments
- Speed management
- Driver fatigue management
- Incident management
- Vehicle maintenance
- Driver wellness
- Driver training
- Safety performance monitoring

The organization should ensure that these processes are actively implemented and communicated to all relevant employees.

Step 4 – Use the Supporting Records

The supplied records and templates are intended to support implementation and provide evidence that the system is functioning effectively.

The records should:

- Be completed accurately
- Be updated regularly
- Reflect actual operations
- Be retained as evidence
- Be reviewed by management periodically

The organization may use:

- Electronic systems
- Excel spreadsheets
- Printed registers
- Fleet management systems
- Existing company systems

Step 5 – Train Employees

The company should ensure that all relevant personnel understand:

- Their responsibilities
- The company's safety expectations
- Applicable procedures
- Reporting requirements
- Record-keeping responsibilities

Particular focus should be placed on:

- Drivers
- Supervisors

- Fleet controllers
- Maintenance personnel
- Loading personnel

Training and awareness should be ongoing and supported by the supplied training records and modules.

4. Understanding the Record References

Throughout the manual, references are made to supporting documents using specific codes.

Record Reference Structure

Prefix Meaning

R Record / Register

P Policy / Procedure

M Training Module

Examples:

R3 = Trip Mass Record

R8 = Accident Investigation Register

P2 = Fatigue Management Policy

P5 = Vehicle Pre-Trip Procedure

M1 = Defensive Driver Training Module

These referenced documents are intended to form part of the complete RTMS toolkit system.

5. Management Responsibilities

Management is responsible for ensuring that:

- The toolkit is properly implemented
- Resources are allocated
- Employees are trained
- Records are maintained
- Safety performance is monitored
- Corrective actions are implemented
- Continual improvement is promoted

Management involvement is essential to creating and maintaining a strong road safety culture within the organization.

6. Driver Responsibilities

Drivers are key contributors to the effectiveness of the RTMS system.

Drivers are expected to:

- Operate vehicles safely
- Conduct pre-trip inspections
- Comply with speed limits
- Manage fatigue responsibly
- Report defects and incidents
- Follow loading procedures
- Participate in training initiatives

The manual specifically recognizes drivers as critical to achieving road safety outcomes.

7. Maintaining the System

The toolkit should be maintained as a living system that evolves with the business.

The company should:

- Review records regularly

- Analyze trends
- Investigate incidents
- Monitor corrective actions
- Update risk assessments
- Revise procedures where necessary
- Keep records current and complete

Where operational changes occur, the manual and associated records should also be updated accordingly.

8. Preparing for RTMS Audits

The toolkit is intended to assist organizations in preparing for RTMS audits by providing a structured framework and supporting evidence.

For any guidance on the RTMS audit/certification process, contact JC Auditors who are the recognised RTMS certification auditors. They are SANAS accredited and registered on the International Accreditation Forum (IAF) thus ensuring regional and global acceptance for all certifications issued. In addition to conducting RTMS certification audits, JC Auditors also offers certification for ISO 9001, ISO 14001, ISO 45001, ISO 13485, ISO 3834, ISO 27001, ISO 22000, ISO 39001 and related training programmes.

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Prior to an audit, the company should ensure:

- All sections of the manual are completed
- Supporting records are available
- Evidence is current
- Employees understand their responsibilities

- Corrective actions are documented
- Safety performance is monitored

9. Continual Improvement

The RTMS system is based on continual improvement principles.

The organization should use the supplied records and monitoring tools to:

- Identify trends
- Detect recurring issues and reduce risks
- Improve operational efficiency
- Improve driver behaviour
- Reduce incidents and infringements
- Improve overall road safety performance

The Safety Performance Report (R18) should be used as a key management tool for monitoring performance and identifying opportunities for improvement.

10. Final Guidance

This toolkit has been designed to provide practical assistance in establishing a structured and effective RTMS management system.

- Successful implementation depends on:
- Active management involvement
- Driver participation
- Proper use of the supplied records
- Consistent monitoring
- Accurate record keeping
- Continual review and improvement

When properly implemented, the RTMS Toolkit Manual and accompanying records can assist organizations in improving safety performance, strengthening compliance, reducing operational risks, and building a sustainable transport operation.

Good luck! Wishing you great success in your journey ahead.