

# TAXI POLICY

<b>Policy Title:</b>	Taxi Policy		
<b>Executive Summary:</b>	This policy provides guidance to staff to ensure the efficient and effective use of internal resources, and minimise costs to the Trust by the appropriate use of taxis.		
<b>Supersedes:</b>	Version 2		
<b>Description of Amendment(s):</b>	Updated policy to reflect current usage.		
<b>This policy will impact on:</b> Clinical practices, administrative practices, employees, patients and visitors.			
<b>Financial Implications:</b> Control spend on external transport providers.			
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## 1. Introduction

Taxis may be required to facilitate the urgent admission/discharge/transfer of patients, or to assist in the rapid transport of case notes/x-rays, specimens, staff, goods or equipment as and when required.

East Cheshire NHS Trust incurs significant costs through the use of taxis and there are a number of alternative transport options available which should be explored before booking a taxi.

This document defines the Trust's policy in relation to the criteria for the acceptable use of taxis for Trust business, the relevant authorisation, booking procedure, and alternative transport options.

## 2. Purpose

The purpose of this policy is to reduce reliance on taxis, ensure the efficient and effective use of internal resources, and minimise costs to the Trust by the appropriate use of taxis and avoidance of misuse.

The policy will also provide information on alternative, more cost effective methods of transport provided by the Trust, which staff should endeavour to use whenever possible.

## 3. Roles and Responsibilities

### **Chief Executive**

The Chief Executive is the Accountable Officer for ensuring that the taxi service is managed efficiently and effectively and that robust controls are in place, and has delegated this responsibility to the Director of Finance.

### **Director of Finance**

The Director of Finance, as the nominated lead Director, will ensure that there are robust systems in place for the effective management of the taxi service.

### **Head of Facilities (Soft FM)**

The Head of Facilities (Soft FM) has day-to-day responsibility for all aspects of the taxi service and will ensure that processes are in place to monitor compliance with the policy and any non-conformance is acted upon.

### **Facilities Contract & Performance Manager**

The Facilities Contract & Performance Manager has responsibility for ensuring that the taxi service operates within the policy guidelines and within budget. This will include the following:

- Ensuring taxi invoices are regularly scrutinized and anomalies/misuse reported as appropriate.
- Informing departments of alternative transport providers.

- Liaising with Private Taxi Hire companies to ensure the Trust receives a service that is value for money, and to identify any efficiency that can be made.
- Managing complaints/operational issues effectively.

### **Switchboard**

The Switchboard staff have specific responsibility for ensuring the following:

- All relevant booking information, including financial code, is received and recorded on the Taxi Booking Form from the requesting ward/department.
- All wards/departments are made aware of alternative transport available where appropriate such as the Courier Service, internal Trust Discharge Vehicle.
- All taxi bookings are faxed or telephoned to the appropriate taxi company in a timely manner.

### **Departmental Managers/Heads of Service**

Departmental Managers/Heads of Service have been delegated the overall responsibility of implementing the Taxi Policy within their areas of control.

### **All East Cheshire NHS Trust Staff (including Agency and Locum)**

All staff have a responsibility to ensure they comply with this policy and procedures.

## **4. Processes and Procedures**

### **4.1 Criteria for Use of Taxis**

- When the need for transport arises, staff should ensure that wherever possible all options for transport other than taxi are considered prior to booking (please see Appendix 1 for list of alternative transport providers, and details of scheduled locations covered by the Courier Service on a daily/weekly basis).
- Only in exceptional circumstances should taxis be used. Prior to ordering a taxi, staff are expected to consider the following:
  - Is the journey essential?
  - Can a taxi be shared if going to the same location?
  - Is there an alternative means of transport that can be used eg Courier Service?
  - Can the item be safely posted to be received in a timely manner?

Staff may be required to justify the reason for booking a taxi.

- Case-notes and specimens should not be moved routinely by taxi. Taxis should only be used to transport specimens, for example, when the need is urgent or unexpected, and the timing is outside the scope of the Trust's daily courier shuttle service runs. In all other circumstances the Courier Service must be used.

### **4.2 Taxis for Patient Journeys**

- If a patient requires Non-emergency Patient Transport (including taxis), staff should firstly refer to the Department of Health's Eligibility for Patient Transport Services (PTS) Criteria which provides guidance on who is eligible for PTS (please see Appendix 3). Therefore, if the patient does not meet the eligibility criteria, the Trust is under no

obligation to provide transport. Wherever possible, patients should be advised to make their own arrangements with a relative or friend, or to use public transport. Taxis for patients should only be booked in exceptional circumstances, for example, if the patient is deemed vulnerable.

Social or financial reasons are not appropriate justification for a taxi request. If the patient has difficulty in meeting the cost of transport to/from Hospital, there are established procedures whereby the costs of travel may be recovered by patients on low incomes. The Department of Health's Healthcare Travel Costs Scheme (HTCS) is part of the NHS Low Income Scheme, and was set up to provide financial assistance to those patients who do not have a medical need for ambulance transport, but who require assistance with their travel costs to attend NHS appointments. A Quick Reference Guide for patients who may be entitled to reimbursement of travel costs is detailed in Appendix 4 - Annex A of the HTCS Instructions and guidance for the NHS document. A copy of the full HTCS document can be viewed by accessing the Department of Health website link below

[https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/116385/dh\\_116385.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/116385/dh_116385.pdf)

- In the case of planned discharges, every effort should be made by the Ward staff to ensure that any transport arrangements have been made at least 48 hours in advance. Where a patient is not eligible for Non-emergency Patient Transport, they will need to make their own transport arrangements with a relative or friend, or to use public transport.
- If, for medical or clinical reasons, a patient requires transport to/from Hospital then the Non-emergency Patient Transport Service should be used.
- The taxi service should not be used to transport patients in place of an ambulance. Taxi Drivers are not trained ambulance personnel and should not be expected to assist patients when getting in/out of vehicles or accessing their properties. Any patients booked to travel by taxi should be medically fit, able to access/exit the vehicle unaided, and move independently, otherwise an escort and wheelchair will need to be provided by the Ward/Department to accompany the patient.

#### 4.3 Appropriate Use of Taxis

Examples of appropriate use of taxis may include the following:

- Unscheduled patient discharges from the Hospital where there is no other means to transport the patient.
- Discharge of vulnerable patients.
- To deliver urgently required specimens, case-notes, medication or equipment for the Trust, where these cannot wait for the regular Trust courier runs or other regular or ad-hoc runs going to the same destination.

***Where items for the Trust's Courier Service have missed the scheduled run, these should not be routinely transported via taxi but should wait for the next scheduled run.***

- To transport patients for tests to/from another NHS Hospital, where it is more cost-effective and clinically appropriate to utilise a taxi instead of the non-emergency patient transport service (PTS).
- To take an in-patient to their home in order to make a home assessment.
- To enable staff to attend their place of work to undertake Trust business "out-of-hours", or when public or private transport facilities are not available (eg Christmas and Bank

Holidays). Before any taxi is ordered when public transport is not available, the Departmental Manager or Deputy must authorise the use of a taxi for home to work and/or return journey(s).

- To enable a member of staff to make a journey or return on Trust business to or from their Trust base. This may only occur where:
  - The member of staff has no personal or private transport and there is not suitable alternative Trust transport arrangement or,
  - The cost of using a taxi is cheaper than using any other appropriate transport arrangement, including private or public vehicle particularly when parking availability and charges are taken into account.

#### 4.4 **Waiting Time**

- Waiting time will be charged by the majority of taxi companies and staff should ensure that booking times are realistic to avoid the Trust incurring unnecessary cost.
- If a return journey is required then a second taxi must be booked for the return using the procedure below.

#### 4.5 **Procedure for Booking a Taxi**

- Before a taxi is ordered, the person requesting the taxi must have obtained verbal authorisation from their Departmental Manager.
- When a taxi is required for Trust business the following procedure must be followed:
  - All taxis should be booked via the Switchboard, based at Macclesfield District General Hospital (Dial 0 internally or 01625 421000 from external phones).
  - When making a booking the following information must be provided:
    - The Date and Time of when the taxi is required (please provide a specific time rather than stating asap)
    - The Full Name and Contact Number of the person making the request
    - The Name of the Ward/Department, Directorate and Trust (if different to ECT) making the booking
    - The Nature of the Request/Full Name of the Passenger to be conveyed or reason for the taxi for example, patient, staff, specimen or case-notes collection
    - Pick-up Location
    - Delivery Location
    - Financial Code (6 digits)
- If the appropriate financial code is not known at the point of booking this may delay the process as the Switchboard Operator will need to refer the caller to the Facilities Contract & Performance Manager to obtain the correct financial code.
- In order to minimise costs, the Switchboard staff may organise taxis to be shared wherever possible. Someone booking a non-urgent journey may be asked to delay or advance their journey by a reasonable time in order to share a taxi.
- Cancellation of a Taxi Booking

Should a taxi no longer be required, staff must ensure that the booking is cancelled through the Switchboard, as soon as possible prior to the journey time as the Trust may still be charged by the taxi company for wasted journeys.

Any standing orders made for taxis are also cancelled via the Switchboard as soon as they are no longer required.

#### 4.6 Taxi Booking Form

- Every taxi booking received by the Switchboard Operator is recorded on an individually numbered Taxi Booking Form (see Appendix 2 for example). The completed form is then faxed to the appropriate taxi company to make the booking.
- The Taxi Booking Form provides a receipt of the journey and proof of booking. The forms are retained by the Switchboard for one week and then sent to the Facilities Contract & Performance Manager to be scrutinised and kept for a period of 12 months.
- It is important that all sections of the Taxi Booking Form are completed in case of any queries.

#### 4.7 Allocation of Taxi Costs

- On receipt of the taxi invoice, the Facilities Contract & Performance Manager will be responsible for the re-charge of journeys in accordance with the financial code stated on the Taxi Booking Form. The journey details are checked with the invoice and the taxi charges allocated accordingly.

#### 4.8 Taxis for Personal Use

- Taxis booked via the Switchboard are for Trust business only and must not be booked for personal use. Booking taxis for personal use is an offence and disciplinary action may be taken against offenders who abuse the Trust taxi booking system.

#### 4.9 Activity Monitoring

- The Facilities Contract & Performance Manager will validate the taxi invoices against the Taxi Booking Forms from Switchboard, and record the invoice details on a Summary of Taxi Expenditure report. The report provides an annual breakdown of cost by financial code for each taxi company used by the Trust.
- If specific journey details are required, these may be obtained by checking with the individual Taxi Booking Forms which are retained by the Facilities Contract & Performance Manager for a period of 12 months.
- High usage or value taxi journeys, and any journeys which incur waiting time costs, will be subject to scrutiny and the relevant Ward/Department will be challenged to justify.

#### 4.10 Complaints

- All complaints or taxi issues should be reported to the Facilities Contract & Performance Manager by emailing [sarah.haightturner@nhs.net](mailto:sarah.haightturner@nhs.net) in the first instance and wherever possible rectified prior to the Trust's complaints procedure being activated.

## 5. Monitoring Compliance

The key performance indicators within this policy will be monitored by the Facilities Contract & Performance Manager and reported quarterly to the Head of Facilities (Soft FM) via the Facilities Team Meeting.

5.1 Compliance with this policy will be monitored against the following key performance indicators:

- a) Number of taxi complaints received – complaints tolerance 5%
- b) Evidence of timely taxi complaints responses (14 working days)
- c) Number of taxis to arrive within 10 minutes of Collection Time stated
- d) Auditing of Taxi Forms

## 6. References

This document has been produced with reference to the following documents:

Department of Health - Eligibility for Patient Transport Services (PTS) Criteria 2007  
<http://www.dh.gov.uk/publications>

Department of Health - Healthcare Travel Costs Scheme (HTCS) 2010  
<https://www.gov.uk/government/publications/healthcare-travel-costs-scheme-instructions-and-guidance-for-the-nhs>

## ALTERNATIVE TRANSPORT PROVIDERS

### COURIER SERVICE (NON-PATIENT TRANSPORT)

**For all general transport requests contact:**

**ERS Medical                      Tel No: 0333 240 4030**

The Courier Service is able to undertake the transportation of a variety of goods including:

Casenotes	Pharmaceuticals
Mail	Patient equipment
Specimens	Medical consumables
Laundry	Medical equipment

The following locations are included in the scheduled transport runs on a **daily** basis:

Macclesfield ECT locations  
Knutsford & District Community Hospital  
Congleton War Memorial Hospital  
Community Clinics  
Manchester Hospitals (Wythenshawe, MRI, Stepping Hill, Withington, Manchester University and Christies)

The following areas are also included in the scheduled transport runs on a **weekly** basis:

Crewe, Chester  
Liverpool  
Leek Moorlands Hospital

The Courier Service should be used for all routine journeys, and staff should make every effort to try and incorporate bookings on the daily/weekly runs.

When a request cannot be incorporated into a scheduled run, this will be a chargeable journey for which the required to provide a financial code.

### ECT DISCHARGE VEHICLE (PATIENT TRANSPORT)

**For on-the-day patient discharges requiring transport contact:**

**Discharge Lounge    Tel No: 01625 661063**

The Discharge Lounge operates a wheelchair vehicle for on-the-day discharges only. The service is for the discharge and transfer of patients who do not require specialist Ambulance (PTS) transport.

The service is available:      Monday- Friday      09:00-19:00

In the evenings the service is available from 19:00-06:00 and can be booked through the Night Sister on bleep 3011 or via the Switchboard.

## **PATIENT/VISITOR TRAVEL INFORMATION**

- Taxi Free phones are located in the following areas for patient/visitor use (the free phones are not be used for booking taxis for Trust business):

Main Reception, MDGH  
Emergency Department, MDGH  
Orthopaedic Out-patient Reception, MDGH

- Local bus routes (copies of bus timetables are held on the Welcome Desk, MDGH)

Booking No: **067281**

### TAXI BOOKING FORM

**Please complete ALL information on the form and fax to the appropriate Taxi Company**

PLEASE USE BLOCK CAPITALS

Date Required \_\_\_\_\_ Collection Time \_\_\_\_\_ AM/PM

Requested by \_\_\_\_\_ Department \_\_\_\_\_

Trust \_\_\_\_\_ Directorate \_\_\_\_\_

Nature of Request / Name of Passenger  
\_\_\_\_\_

Collect from \_\_\_\_\_  
\_\_\_\_\_

Deliver to \_\_\_\_\_  
\_\_\_\_\_

Comments \_\_\_\_\_

Taxi Company \_\_\_\_\_

Financial Code:

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Name of Switchboard Operator *(please print)* \_\_\_\_\_

Signed \_\_\_\_\_ Switchboard Operator

*Please retain original and send to the Facilities Contract & Performance Manager  
within 5 working days*

## DEPARTMENT OF HEALTH

ELIGIBILITY CRITERIA FOR PATIENT TRANSPORT SERVICES (PTS)  
2007

## Who is eligible for PTS?

6. PTS should be seen as part of an integrated programme of care. A non-emergency patient is one who, whilst requiring treatment, which may or may not be of a specialist nature, does not require an immediate or urgent response.
7. Eligible patients should reach healthcare (treatment, outpatient appointment or diagnostic services i.e. procedures that were traditionally provided in hospital, but are now available in a hospital or community setting) in secondary and primary care settings in a reasonable time and in reasonable comfort, without detriment to their medical condition. Similarly, patients should be able to travel home in reasonable comfort without detriment to their medical condition. The distance to be travelled and frequency of travel should also be taken into account, as the medical need for PTS may be affected by these factors. Similarly, what is a “reasonable” journey time will need to be defined locally, as circumstances may vary.
8. Eligible patients are those:
  - Where the medical condition of the patient is such that they require the skills or support of PTS staff on/after the journey and/or where it would be detrimental to the patient’s condition or recovery if they were to travel by other means.
  - Where the patient’s medical condition impacts on their mobility to such an extent that they would be unable to access healthcare and/or it would be detrimental to the patient’s condition or recovery to travel by other means.
  - Recognised as a parent or guardian where children are being conveyed.
9. PTS could also be provided to a patient’s escort or carer where their particular skills and/or support are needed e.g. this might be appropriate for those accompanying a person with a physical or mental incapacity, vulnerable adults or to act as a translator. Discretionary provision such as this would need to be agreed in advance, when transport is booked.
10. A patient’s eligibility for PTS should be determined either by a healthcare professional or by non-clinically qualified staff who are both:
  - clinically supervised and/or working within locally agreed protocols or guidelines, and
  - employed by the NHS or working under contract for the NHS

DEPARTMENT OF HEALTH  
HEALTHCARE TRAVEL COSTS SCHEME

# Annex A - Quick reference guides – patient flow chart

