

## Policy for Requesting and Using Staff Taxis Charged to the Trust

Issue Date	Review Date	Version
May 2015	Extended to December 2022	5.2

### Purpose

This Policy applies when payment for a staff taxi journey is made from a PHNT budget. It does not cover arrangements for taxis for patients or for transporting patient records, which are subject to a separate taxi policy.

All bookings must be made to, who hold the contract following a tendering process in 2004.

The purpose of this policy is:

- To describe the permitted reasons for staff to use taxis funded by PHNT
- To describe the Procedure to be followed when booking a taxi
- To provide the Record of the Taxi Booking to be completed at the time of booking
- To describe the audit trail

### Who should read this document?

All Trust staff.

### Key Messages

Staff Taxis must only be arranged in accordance with this policy. This Policy applies when payment for a staff taxi journey is made from a PHNT budget. It does not cover arrangements for taxis for patients or for transporting patient records, which are subject to a separate taxi policy.

### Core accountabilities

<b>Owner</b>	HR Business Partner
<b>Review</b>	JSNC
<b>Ratification</b>	Director of People
<b>Dissemination (Raising Awareness)</b>	HR Business Partner
<b>Compliance</b>	HR Business Partner

### Links to other policies and procedures

None specifically.

### Version History

1	January 1998
---	--------------

3	November 2008	Amended as follows <ul style="list-style-type: none"> <li>• Written in the approved PHT format including contents page.</li> <li>• Includes details of the requesting and recording processes to be followed.</li> <li>• Costs charged to requesters' Budgets; no centrally held budget.</li> </ul>
4	March 2011	Trust Commitment to Valuing People amended in line with the Equality Act 2010  Electronic policy paths updated  Extended to February 2015. Agreed by Author.
5	May 2015	Minor changes only agreed by HR Director.
5.1	June 2020	Extended to May 2021 by Lisa White
5.2	August 2021	Extension granted until December 2022

*The Trust is committed to creating a fully inclusive and accessible service. Making equality and diversity an integral part of the business will enable us to enhance the services we deliver and better meet the needs of patients and staff. We will treat people with dignity and respect, promote equality and diversity and eliminate all forms of discrimination, regardless of (but not limited to) age, disability, gender reassignment, race, religion or belief, sex, sexual orientation, marriage/civil partnership and pregnancy/maternity.*

**An electronic version of this document is available on Trust Documents.  
Larger text, Braille and Audio versions can be made available upon request.**

## Contents

<b>Section</b>	<b>Description</b>	<b>Page</b>
1	Introduction	4
2	Purpose, including legal or regulatory background	4
3	Definitions	4
4	Duties	4
5	Key elements	4
6	Overall Responsibility for the Document	6
7	Consultation and ratification	6
8	Dissemination and Implementation	6
9	Monitoring Compliance and Effectiveness	7
10	References and Associated Documentation	7
Appendix 1	Dissemination Plan and Review Checklist	8
Appendix 2	Equality Impact Assessment	9
Appendix 3	Record of Booking	11
Appendix 4	Permitted reason for Booking Taxis	12

## 1 Introduction

This Policy sets out the arrangements for when payment for a staff taxi journey is made from a PHNT budget. It does **not** cover arrangements for taxis for patients or for transporting patient records, which are subject to a separate taxi policy.

## 2 Purpose, including legal or regulatory background

The purpose of this policy is:

- To describe the permitted reasons for staff to use taxis funded by PHNT
- To describe the Procedure to be followed when booking a taxi
- To provide the Record of the Taxi Booking to be completed at the time of booking
- To describe the audit trail

## 3 Definitions

None specifically within the policy.

## 4 Duties

### 2. Budget Holders Responsibilities

Budget Holders must:

- Consider other means of transport before requesting a taxi to be paid for by PHT
- Keep an auditable record of the request – see form attached as Appendix 1

Budget Holders are responsible for authorising the use of contract taxis. They may delegate this responsibility when it is not reasonably practicable for them to authorise.

## 5 Key elements (determined from guidance, templates, exemplars etc)

### 3. Permitted Reasons for Requesting Staff Taxis

University Hospitals Plymouth NHS Trust expects all staff to make their own travel arrangements for travelling between home and their place of work at their own expense.

There are a few exceptions to this when the use of a contract taxi **may** be authorised. These are as follows:-

- TRANSFER - When a member of staff is expected to transfer to a location away from their normal place of work during a shift in order to meet the needs of the service including attending meetings where the member of staff would be eligible to claim costs for using their own vehicle and use of a contract taxi is more cost effective, e.g. time saving, avoiding parking charges, etc.

- EXTRA DUTIES - When a member of staff is called in for emergency, extra-contractual duties. This will not include regular "On Call" where it is the staff member's responsibility to make arrangements to attend work.
- BANK HOLIDAY - On Bank Holidays when public transport or no other means of transport are available. Employees will be expected to pay the equivalent public transport rate towards the cost of the taxi, which has been set at the Adult day rider rate with Plymouth City bus (£3.70 as at 8 May 2015). The only exception to this is for a staff that holds a bus travel card, who will be exempt from the charge on production of the travel card. The card issue number should be recorded on the booking form. If an employee is a holder of a staff car parking permit they are not entitled to use a Trust funded taxi, on a bank holiday, as they are deemed to have access to a car which would be their normal means of transport to work. The £3.70 contribution must be paid into the appropriate cost centre against subjective code 7295 (Taxi and Other vehicle hire), by the Budget Holder via the Cashiers Office.
- ILLNESS - Where a member of staff is taken ill on duty and other means of transport are not thought to be appropriate for the health and safety of that individual.
- WORK DELAY - Where staff that normally travel by public transport are delayed unexpectedly at work beyond their normal finishing time and public transport has ceased.
- STAFF EXPENSES - Staff travelling to the bus or rail station or airport where public transport is not an option and where they would be able to claim the cost of the journey as part of their expenses.
- PHT BUSINESS - Staff travelling abroad on PHT business, where a taxi may be used for a journey to and from airport of exit if proven to be the most cost-effective means of transport.

In all cases, contract taxis must only be used when all other alternatives have been considered and dismissed.

It should be noted that the use of contract taxis is **not** a fringe benefit and employees who abuse the use of this facility will be subject to the Trust's Disciplinary Procedure.

#### **4. Procedure for Booking Taxis**

- a) All requests to be made by the relevant Budget Holder or nominated deputy direct to Taxi First by telephoning 222222.
- b) Details to be provided by caller to Taxi fast are:
  - a. Name of employee
  - b. Pick up point
  - c. Pick up date
  - d. Pick up time
  - e. Destination
  - f. Any special requirements, e.g. passenger needs assistance
  - g. Name of Caller

- h. Cost Centre to be charged – All cost centres are a 6 digit number and are prefixed by an organisation code. The Caller should therefore quote:

Cost Centre - e.g. 12xxxx  
Organisation code – e.g. RK9N

The only exception to this is trust funds which have a 4 digit number

- i. Permitted Reason Code – this is a 2 digit number commencing in P for patient, S for staff, and C for carer/relative and O for other. The permitted reason codes are attached in appendix 5.
- j. Reason for Journey e.g. TRANSFER, EXTRA DUTIES, etc.
- c) Taxi fast will provide a Job Number at the time of call.
- d) All above details and the Job Number are to be recorded at the time of booking on the “PHT Record of Taxi Booking Form” (Appendix 3). This form must be kept for audit purposes by the Requester.
- e) Taxi fast will provide monthly consolidated invoices to the Finance Department with electronic backup details as agreed. Therefore individual invoices will not be received by Budget Holders.

Retrospective audit will be undertaken regarding the validity of this service by the Corporate Finance Team.

## **6 Overall Responsibility for the Document**

The HR Director is responsible for ratifying this document. The HR Business Partner has the responsibility for the dissemination, implementation and review of this policy.

## **7 Consultation and Ratification**

The design and process of review and revision of this policy will comply with The Development and Management of Trust Wide Documents.

The review period for this document is set as default of five years from the date it was last ratified, or earlier if developments within or external to the Trust indicate the need for a significant revision to the procedures described.

This document will be approved by the JSNC and ratified by the Director of HR &OD. Non-significant amendments to this document may be made, under delegated authority from the Director of HR & OD, by the nominated author. These must be ratified by the Director of HR & OD and should be reported, retrospectively, to the approving JSNC.

Significant reviews and revisions to this document will include a consultation with named groups, or grades across the Trust. For non-significant amendments, informal consultation will be restricted to named groups, or grades who are directly affected by the proposed changes

## **8 Dissemination and Implementation**

Following approval and ratification, this policy will be published in the Trust's formal documents library and all staff will be notified through the Trust's normal notification process.

Document control arrangements will be in accordance with The Development and Management of Trust Wide Documents.

The document author(s) will be responsible for agreeing the training requirements associated with the newly ratified document with the named Heinz Scheffer and for working with the Trust's training function, if required, to arrange for the required training to be delivered.

## **9 Monitoring Compliance and Effectiveness**

The Trust will undertake a regular audit of the processes specified in this policy. It should be noted that the responsibilities in this policy are enforceable and that managers (and employees where applicable) failing to uphold their responsibilities may find themselves in breach of internal disciplinary policies.

## **10 References and Associated Documentation**

Trust standing financial instructions.

Dissemination Plan			
<b>Document Title</b>	Policy for Requesting and Using Staff Taxis Charged to the Trust		
<b>Date Finalised</b>	May 2015		
Previous Documents			
<b>Action to retrieve old copies</b>	Old copy removed from Trust Documents		
Dissemination Plan			
Recipient(s)	When	How	Responsibility
All Trust staff	May 2015	Information Governance StaffNet Page	Information Governance Team

Review Checklist		
<b>Title</b>	Is the title clear and unambiguous?	Yes
	Is it clear whether the document is a policy, procedure, protocol, framework, APN or SOP?	Yes
	Does the style & format comply?	Yes
<b>Rationale</b>	Are reasons for development of the document stated?	Yes
<b>Development Process</b>	Is the method described in brief?	Yes
	Are people involved in the development identified?	Yes
	Has a reasonable attempt has been made to ensure relevant expertise has been used?	Yes
	Is there evidence of consultation with stakeholders and users?	Yes
<b>Content</b>	Is the objective of the document clear?	Yes
	Is the target population clear and unambiguous?	Yes
	Are the intended outcomes described?	Yes
	Are the statements clear and unambiguous?	Yes
<b>Evidence Base</b>	Is the type of evidence to support the document identified explicitly?	Yes
	Are key references cited and in full?	Yes
	Are supporting documents referenced?	Yes
<b>Approval</b>	Does the document identify which committee/group will review it?	Yes
	If appropriate have the joint Human Resources/staff side committee (or equivalent) approved the document?	Yes
	Does the document identify which Executive Director will ratify it?	Yes
<b>Dissemination &amp; Implementation</b>	Is there an outline/plan to identify how this will be done?	Yes
	Does the plan include the necessary training/support to ensure compliance?	Yes
<b>Document Control</b>	Does the document identify where it will be held?	Yes
	Have archiving arrangements for superseded documents been addressed?	Yes
<b>Monitoring Compliance &amp; Effectiveness</b>	Are there measurable standards or KPIs to support the monitoring of compliance with and effectiveness of the document?	Yes
	Is there a plan to review or audit compliance with the document?	Yes
<b>Review Date</b>	Is the review date identified?	Yes
	Is the frequency of review identified? If so is it acceptable?	Yes

<b>Overall Responsibility</b>	Is it clear who will be responsible for co-ordinating the dissemination, implementation and review of the document?	Yes
-------------------------------	---	-----

<b>Core Information</b>	
<b>Date</b>	May 2015
<b>Title</b>	Policy for Requesting and Using Staff Taxis Charged to the Trust
<b>What are the aims, objectives &amp; projected outcomes?</b>	EIA not required for this document
<b>Scope of the assessment</b>	
<b>Collecting data</b>	
<b>Race</b>	
<b>Religion</b>	
<b>Disability</b>	
<b>Sex</b>	
<b>Gender Identity</b>	
<b>Sexual Orientation</b>	
<b>Age</b>	
<b>Socio-Economic</b>	
<b>Human Rights</b>	
<b>What are the overall trends/patterns in the above data?</b>	
<b>Specific issues and data gaps that may need to be addressed through consultation or further research</b>	

<b>Involving and consulting stakeholders</b>				
<b>Internal involvement and consultation</b>				
<b>External involvement and consultation</b>				
<b>Impact Assessment</b>				
<b>Overall assessment and analysis of the evidence</b>				
<b>Action Plan</b>				
<b>Action</b>	<b>Owner</b>	<b>Risks</b>	<b>Completion Date</b>	<b>Progress update</b>

<b>PHT RECORD OF STAFF TAXI BOOKING</b>		
PLEASE PRINT ALL INFORMATION OR ENTER ELECTRONICALLY		
a	Name of Passenger	
b	Pick up Point	
c	Pick up Date	
d	Pick up Time	
e	Delivery Point	
f	Any special requirements	
g	Name of Caller	
h	Contact Tel. No. for Caller	
i	Cost Centre to be charged e.g. RK9N/12xxxx	
j	Staff Contribution required?	
k	£3.70 collected for Bank Holiday Taxi and paid into Cost Centre via Cahiers Office by Budget Holder	£3.70 collected Yes / No  £3.70 credited to Budget Cost centre by Budget Holder Yes / No
l	Bus Travelcard Number	
m	Reason for Journey (e.g. Transfer, Illness, etc.)	
n	Job No. (provided by Taxi-Fast at time of call)	
o	Budget Holder Signature	

**This form is to be completed at time of requesting and to be kept for audit purposes.**

**Please file as instructed by Budget Holder.**

PERMITTED REASON FOR BOOKING TAXIS	
<b>Patients</b>	
P1	Where funded transport has been approved and a taxi meets the clinical needs of the
<b>Staff</b>	
S1	Transfer
S2	Extra Duties
S3	Bank Holiday
S4	Illness
S5	Work delay
S6	Staff Expenses
S7	PHT Business
<b>Carers/Relatives</b>	
C1	Carers/Relatives who are required to attend the hospital as part of the
C2	Return journey home for carers/relatives who have attended the hospital with a patient
<b>Other</b>	
O1	Transportation of URGENT casenotes (i.e. those required within 1 hour)
O2	Delivery of late TTA, etc to speed up discharge
O3	Delivery of items missed at discharge
O4	Other deliveries