

Policy for Requesting and Using Staff Taxis Charged to the Trust

Date	Version
May 2015	5

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.

Accountabilities

Production	HR Business Partner
Review and approval	JSNC
Ratification	Hein Scheffer, HR Director
Dissemination	HR Business Partner
Compliance	HR Business Partner

Links to other policies and procedures

None specifically.

Version History

V1	5/1/98	
V3	20/11/08	Amended as follows <ul style="list-style-type: none"> • Written in the approved PHT format including contents page. • Includes details of the requesting and recording processes to be followed. • Costs charged to requesters' Budgets; no centrally held budget.

V4	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.
V5	May 2015	Minor changes only agreed by HR Director.
Last Approval		Due for Review
May 2015		May 2020

The Trust is committed to creating a fully inclusive and accessible service. By making equality and diversity an integral part of the business, it 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 the Trust Documents. Larger text, Braille and Audio versions can be made available upon request.

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

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

Plymouth Hospitals 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, currently the 'Vital Signs' electronic newsletter.

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.

Core Information				
Document Title	Policy for Requesting and Using Staff Taxes Charged to the Trust			
Date Finalised	May 2015			
Dissemination Lead	HR Business Partner			
Previous Documents				
Previous document in use?	No			
Action to retrieve old copies.	Old copy removed from Trust Documents			
Dissemination Plan				
Recipient(s)	When	How	Responsibility	Progress update
All staff	May 2015	Vital Signs	Document Control	

Review		
Title	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
Rationale	Are reasons for development of the document stated?	Yes
Development Process	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
Content	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
Evidence Base	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
Approval	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
Dissemination & Implementation	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
Document Control	Does the document identify where it will be held?	Yes
	Have archiving arrangements for superseded documents been addressed?	Yes
Monitoring Compliance & Effectiveness	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
Review Date	Is the review date identified?	Yes
	Is the frequency of review identified? If so is it acceptable?	Yes
Overall Responsibility	Is it clear who will be responsible for co-ordinating the dissemination, implementation and review of the document?	Yes

<u>PHT RECORD OF STAFF TAXI BOOKING</u>		
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	
Patients	
P1	Where funded transport has been approved and a taxi meets the clinical needs of the
Staff	
S1	Transfer
S2	Extra Duties
S3	Bank Holiday
S4	Illness
S5	Work delay
S6	Staff Expenses
S7	PHT Business
Carers/Relatives	
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
Other	
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