

Title:			
NHS Lothian Taxi Policy			
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Executive Summary

NHS Lothian incurs significant costs from the use of taxis and there are several alternative transport options available which should be explored before booking a taxi. The Flow Centre is accountable for all bookings and for providing regular updates to ward areas regarding costs.

When the need for transport arises, all efforts should be made to utilise the Board's internal transport options in the first instance (a list of times and routine journeys covered by the various internal transport options is included in this policy).

Only in exceptional circumstances should taxis be used, and where all other means of transport are not possible. Staff will be required to justify the reason for booking a taxi.

Taxis may be required to facilitate the urgent 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. However, case notes, specimens, bloods, drugs etc. should not be moved routinely by taxi. Taxis should only be used to transport specimens etc. when the need is urgent as defined by the criteria detailed in this policy), and the timing is outside the scope of the Board's daily internal transport runs. In all other circumstances the Board's internal van service must be used.

It will continue to be reviewed informally on an annual basis and formally every three years.

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1.0 Purpose

The purpose of this policy is to minimise expenditure on taxis and to clarify the process for booking of all taxis by NHS Lothian, which includes a specific process of prioritisation to identify alternative transport options, with taxis being the “last resort” solution.

2.0 Policy statement

NHS Lothian is committed to providing a quality healthcare service and achieving best value in the use of resources.

NHS Lothian seeks to reduce reliance on taxis, ensuring the efficient and effective use of internal resources, and minimising costs to the Board by the appropriate use of taxis, and avoidance of misuse.

This document details the criteria for the acceptable use of taxis for business, the relevant authorisation process, booking conditions, and alternative transport options.

This policy should be read in conjunction with the [Taxi Booking Procedure](#), the [Transport Guidance as used by NHS Lothian Flow Centre](#), the [NHS Lothian Staff Travel Plan](#) (Intranet link), and the [NHS Lothian Patients’ Travelling Expenses Scheme](#).

3.0 Scope

This policy applies to all NHS Lothian staff associated with, or involved in, the process to request, order or authorise the use of taxis to be charged to NHS Lothian.

4.0 Definitions

Taxi: Use of private contract vehicle for the transportation of patients, staff, equipment, records or other items.

5.0 Implementation roles and responsibilities

The following arrangements have been adopted to ensure that all aspects of this policy are complied with.

5.1 Flow Centre

The Flow Centre has responsibility for ensuring the service operates in line with this policy. This will include:

- Utilising alternative transport options where available

- Ensuring that all relevant booking information is received and recorded on the system from the requesting ward or department
- Providing reports to operational departments regarding their taxi use

5.2 Use of Taxis

NHS Lothian incurs significant costs using taxis and there are several alternative transport options available which should be explored before booking a taxi.

When the need for transport arises, all efforts should be made to utilise the Board's internal transport options in the first instance. A list of times and routine journeys covered by the various internal transport options is contained in the [Transport Guidance as used by NHS Lothian Transport Hub](#) and referred to by the Flow Centre staff.

Only in exceptional circumstances should taxis be used, and where all other means of transport are not possible. Staff will be required to justify the reason for booking a taxi.

Taxis may be required to facilitate the urgent discharge or transfer of patients, or to assist in the rapid transport of case notes, x-rays, specimens, staff, goods, or equipment, as and when required. However, case notes, specimens, bloods, and drugs should not routinely be moved by taxi. Taxis should only be used to transport these items when the need is urgent, as defined by the criteria detailed below, and the timing is outside the scope of the Board's daily internal transport runs. In all other circumstances the Board's internal van service must be used.

Prior to ordering transport staff are expected to consider if;

- The journey is essential
- A taxi can be shared if it is going to the same location
- There is an alternative means of transport that can be used – e.g., internal transport, courier, public transport
- The item be safely posted

Specifically, for transport of patients, subject to specific health needs as detailed by clinical assessment, a taxi may only be requested after all alternative forms of transport have been considered. The order in which these should be explored is outlined below:

- Patient's own transport or relatives. (This is always the preferred option)
- Appropriate public transport options.
- Alternative transport options, such as pool cars, volunteer drivers, and NHS Lothian lease cars. Social or financial reasons are not appropriate justification for a taxi request for transport of a patient. 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 from NHS Lothian. The reimbursement of patient travel is governed by Scottish Government Health Department Guidance NHS MEL (1996)70 – Patient's Travel Expenses Scheme (with subsequent amendments) and NHS Lothian Financial Operating Procedures (Patient's Travel Expenses Scheme).

5.3 Taxis for Patient Transport - Permitted Use

There can be an expectation from patients who have received treatment that transport home will be provided by the Board. If the medical condition of a patient does not require them to be transported by the Ambulance Service, then the Board is not always under an obligation to provide this. Wherever possible, patients should be advised to plan for a relative or friend to collect them, or to use public transport. Taxis for patients who have been discharged will only be booked in exceptional circumstances, and this must be arranged by the Flow Centre, which will assess the requests against operational guidelines.

In the case of planned discharges from the hospital, every effort should be made by the ward staff to arrange for any transportation requirements to be undertaken by a relative or friend of the patient. If, where there is a clinical or mobility need, a patient requires transport to/from hospital then the Flow Centre should be the first point of contact.

Taxis for patients are only permitted under the following circumstances, and where no other appropriate alternative transport is available:

5.3.1 Inter-site

Only when no other means of transport are available through the Flow Centre should a taxi be booked to transfer a patient between NHS Lothian sites.

There are no exceptions to this.

5.3.2 Outpatient Appointment

Only under exceptional circumstances should a taxi be booked to transport a patient to an outpatient appointment.

We may book a taxi to transport patients to the Golden Jubilee and/or other providers for an appointment where they have no other means of transport available.

5.3.3 Home/Discharge

Only patients with a clinical or mobility need qualify to be transported home. Only in exceptional circumstances should a taxi be used to transport a patient home who does not meet these criteria.

Taxis should not be booked for planned discharges; alternative transport should be pre-arranged as part of the discharge planning process.

However, when acute sites are in crisis, and need to create flow by supporting timely discharges off site, requests can be made for patient discharge using taxis. This request must be made by Senior Management on site to a member of the Flow Centre Management Team.

The exception to this is the Emergency Department, RIE where an agreement exists for staff to book a patient taxi without challenge.

5.3.4 Home to Hospital site

Only under exceptional circumstances should a taxi be booked to transport a patient into a hospital site from their home address.

A taxi may be booked to transfer palliative care patients to a hospice where this is urgent, and no other means of transport are available.

5.3.5 Out of hours

Only in exceptional circumstances should a taxi be booked to transport patients from their home address to an out of hours GP appointment.

A taxi can be provided if further investigations are required that require them to be transferred to another site.

5.3.6 Out of Area

Patients should only be transported by taxi out of area when repatriated from NHS Lothian to another health board area, and when alternative Flow Centre transport is not available.

5.3.7 Renal

A patient needs assessment should be completed to determine transport requirements and a taxi should only be booked for patients who are unable to use their own transport or take public transport due to mobility issues and who have no support to assist with transportation.

5.4 Taxis for Staff Transport – Permitted Use

The Staff Travel Plan provides guidance to all staff-on-staff business travel. This guidance should be applied whether ordering a taxi through the Flow Centre, or where staff incur the costs of travelling by taxi with the intention of reclaiming the cost through eExpenses.

Staff travel to and from their home (or any other place the employee attends for personal reasons, such as the home of a friend or relative) to a permanent place of work is regarded as “substantially ordinary commuting” and therefore a private journey.

Taxi transport for staff is only permitted in the following non-routine situations:

5.4.1 On Call (from home address)

A taxi should only be booked to transport a staff member from their home address to the work location to complete an on-call shift if they have no other means of transport available (the taxi company does not provide an emergency on-call service).

5.4.2 Inter-site for Cover

In the event of staff members being moved site to provide cover, the use of taxis will only be permitted to take staff members to and from their original place of work. Staff should consider sharing a taxi between sites.

5.4.3 Inter-site for Meetings

Under no circumstances should staff book taxis through the Flow Centre to transport them between sites for business meetings. Taxis should be booked and paid for by the staff member and claimed back through eExpenses.

5.4.4 To/From Work

Only under exceptional circumstances should a taxi be booked for staff to be transported home from their place of work.

Where a staff member becomes ill whilst on shift and there are no other means of safely getting home, agreement with senior site management must be sought in the first instance and then contact made with the Flow Centre Management Team to authorise.

Under no circumstances should a taxi be booked to transport a member of staff to their usual place of work.

Staff undertaking additional duties (e.g. overtime) outside of normal working hours are not entitled to taxi transport.

5.4.5 Taxis for Personal Use

Where a member of staff is found to have used the taxi service for personal benefit without appropriate authorisation, the employee's line manager will be informed, and appropriate action will be considered, in line with appropriate HR advice.

5.5 Taxis for Specimens/Case notes/Medicines etc (Miscellaneous)

The need to transport items is normally avoidable by good planning and co-ordination. When the need for external transport arises, all efforts should be made to utilise the Board's courier service in the first instance. Taxis should only be used to transport items such as case notes, medicines and specimens when the need is urgent or unexpected, and the timing is outside the scope of the Board's daily courier runs. All items must be appropriately packaged and labelled to ensure security and confidentiality when transporting patient identifiable information and samples.

Routine transfers of specimens, case notes, medicines or equipment should be by NHS Lothian vehicles. Where items for the internal NHS Lothian runs have missed the scheduled run, these should **not** be routinely transported via taxi but should wait for the next scheduled run.

A taxi may be used for the transportation of a laboratory specimen in the circumstances outlined in the below, and where timings are not in line with the Board's internal inter-site transportation.

5.5.1 Letters/Mail

Taxis will not be authorised to deliver letters to patients who have accepted a short notice appointment either in person or by telephone. (Courier services may be used).

If it is determined that a patient has an additional need and confirmation documents are essential to the patient attending the appointment and the appointment is within the next 2 days, a taxi can be requested. The additional need as well as the reason the letter is required must be stated on the taxi request. See NHS Lothian Mail Policy.

A taxi may be booked to deliver certain confirmation documents i.e., Colonoscopy/bowel prep letters.

5.5.2 Case Notes

Case notes should only be transported by taxi if there is an urgent clinical need to receive them immediately and alternative transport options have been explored.

5.5.3 Equipment

Equipment should only be transferred by taxi if there is an urgent clinical need, and this should be authorised by Senior Site Management.

5.5.4 Medicines

Detailed guidance on the transport of medicines can be found in the [Safe Use of Medicines Procedures, section 5 'Transport of Medicines'](#).

Every effort should be made to ensure the patient's medicines are ready for supply to the patient on discharge and medicines must only be delivered in exceptional circumstances when the patient and/or the patient representative cannot collect them.

Medicines should only be transported by taxi when blood bikes or alternative hospital transport is unavailable.

A [risk assessment](#) of any potential harm from missed doses prior to the medicines being delivered to the patient should be carried out by the charge nurse with advice from the pharmacy team where required. Patient consent must be obtained for medicine delivery and to provide the patients contact number to the driver in case of any problems arising with the delivery.

Medicines should only be delivered if the patient or carer receiving the medicines is able to accept these at the door and the patient or carer has received clear directions on how to take the medicines.

If medicines are delivered, the patient should be called by nursing staff prior to transport to ensure they will be in to receive the delivery. Patients should be asked to contact a named ward staff member to confirm when the medicines have been received.

Transport of medicines between NHS Lothian hospital sites should be undertaken by hospital transport or blood bikes. A taxi may be used for the urgent transport of medicines between NHS Lothian hospital sites (urgency as determined by Pharmacy) or where a pharmacist is required to deliver the medicine.

5.5.5 Lost property

Under no circumstances should lost property items be returned via taxi. Patients are required to organise collection of their items.

5.5.6 Clinical Sample

Clinical samples should only be transported via taxi when:

- A test/specimen is labile (i.e., where it will degrade over time). Tests in this category are listed at www.edinburghlabmed.co.uk
- To ensure tests are received by the lab in time to allow processing the same day. Details of test "turnaround" times are provided at www.edinburghlabmed.co.uk

- A test is deemed urgent by the clinical team.

5.6 Taxi Waiting Times

Waiting time will be charged by most taxi companies and staff should ensure that booking times are realistic to avoid the Board incurring unnecessary cost.

If a return journey is required, then a second taxi must be booked for the return using the [Taxi Booking Procedure](#).

5.7 Monitoring of Taxi Use

Taxi usage reports will be issued to all General Managers monthly.

It is the responsibility of Site Directors and General Managers to ensure all taxi usage is validated, and to apply scrutiny in their area on the need and use of taxis on an ongoing basis.

Focus should be applied to staff and non-patient usage.

5.8 Staff responsibilities

5.8.1 General Managers

Are responsible for:

- Ensuring this policy is implemented within their operational department
- Ensuring taxi requests raised by the department are reviewed on a regular basis
- Designating members of staff as authorising managers
- Providing a current list of appropriately authorised managers to the Flow Centre

5.8.2 Approved Authorising Managers

Are responsible for:

- Authorising taxi requests in accordance with the criteria set out in this policy
- Reviewing usage reports regarding taxi requests raised by their department
- Ensuring the [Taxi Booking Procedure](#) is followed when requesting a taxi
- Actively encouraging sustainable transport options amongst staff wherever this is possible

5.8.3 All Staff

Are responsible for:

- Familiarising themselves with this policy, and its associated materials, and understanding the implications on their own work practices
- Adhering to this policy, and associated materials, specifically the process for booking a taxi and the criteria for taxi use

6.0 Associated materials

[Taxi Booking Procedure](#), approved by NHS Lothian Outpatient and Associated Services Senior Management Team, Acute Senior Management Team and Corporate Management Team.

[Guidance for transport requirements as used by the NHS Lothian Flow Centre](#) approved by NHS Lothian Outpatient and Associated Services Senior Management Team.

[NHS Lothian Lab Van service Timetables](#), (see Associated Materials tab) approved by NHS Lothian Transport Manager.

[NHS Lothian Staff Business Travel and Accommodation Plan](#), approved by NHS Lothian Head of Financial Control

[NHS Lothian Patients' Travelling Expenses Scheme](#) (available on the NHS Lothian intranet), approved by NHS Lothian Head of Financial Control

7.0 Evidence base

- [Scottish Government Health Department Guidance NHS MEL \(1996\)70 – Patient's Travel Expenses Scheme](#)
- [NHS Lothian Patient Transport](#)

8.0 Stakeholder consultation

Stakeholders provided comment and feedback on previous policy which have informed the review of this policy.

This policy was circulated to members of the Outpatients and Associated Services Senior Management Team, Acute Senior Management and the Corporate Management Team. This policy was placed on the NHS Lothian Consultation Zone to allow for comment and feedback from all NHS Lothian staff.

9.0 Monitoring and review

This policy will be reviewed, as a minimum, every three years, but may be subject to earlier review in the event of changes to guidance or legislation, or any other factors that may render the policy in need of review.

The use of taxis will be monitored by authorising manager with monthly audit of spend and purpose.