


RE: Freedom of Information Request 202021 / 089 - Funding Arrangements for Patient Travel

Your Query	Date of Request	July 2020
<p data-bbox="86 479 1481 539">Re: Funding arrangements for patients having to travel and/or stay outside the area for specialist treatment</p> <p data-bbox="86 577 1481 678">I am writing to make a request in relation to the matter detailed above. Please disclose all policies, guidance, and instructions, including terms, conditions, eligibility, and format/method of payment, held by Orkney Health Board with regards to:</p> <ul style="list-style-type: none"> <li data-bbox="140 712 1481 813">a. Up-front funding for or reimbursement of travel available for patients and escorts of patients receiving Terminations of Pregnancy, both under nationally-directed schemes and any other provisions; <li data-bbox="140 819 1481 880">b. Up-front funding for or reimbursement for overnight stays available of patients and escorts of patients receiving Terminations of Pregnancy; <li data-bbox="140 887 1481 987">c. Where different to (1) above, up-front funding for or reimbursement of travel available for patients and escorts of patients receiving non-primary care, both under nationally-directed schemes and any other provisions; and <li data-bbox="140 994 1481 1055">d. Where different to (2) above, up-front funding for or reimbursement of overnight stays available for patients and escorts of patients receiving non-primary care; <p data-bbox="86 1099 419 1133">Further, please disclose:</p> <ul style="list-style-type: none"> <li data-bbox="140 1133 1481 1193">e. The 2020-21 Orkney Health Board budget for up-front funding for or reimbursement of travel and overnight stays for patients receiving: <ul style="list-style-type: none"> <li data-bbox="236 1200 707 1234">f. Terminations of pregnancy; and <li data-bbox="236 1240 520 1274">g. Non-primary care 		
Response		
A-D	NHS Orkney's Patient Travel Policy (Appendix 1) covers all types of patient travel and there is no separate policies, instructions etc for terminations of pregnancy travel.	
E-G	Total patient travel budget = £2,043,533. Please note that NHS Orkney does not separate out different types of travel.	

Department:	Title: NHS Orkney Patient Travel Policy	
Refer to Other Documents:	Supersedes: 2016 NHS Orkney Patient Travel Policy	
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Appendix 1

NHS Orkney


Highlands & Islands Patient Travel Scheme

Title: Patient Travel Policy

Reviewers Name (Chairman/Individual)	Group/Committee/Job Title	Current Date
Davie Campbell	Chairman, Finance & Performance Committee	17/10/19
Christina Bichan	Head of Transformational Change & Improvement	03/10/19
Rose Rendall	Equalities Impact Assessment	02/10/19
Rachel Linklater	Travel Administrator	01/10/19

Version/Draft	Date	Latest Changes Made by	Reason for Changes
0.1	31 st August 2016	Christina Bichan, Head of Transformational Change & Improvement	New policy template to be used / policy updates to be administered.
0.2	22 nd September 2016	Christina Bichan, Head of Transformational Change & Improvement	Minor amendments to formatting and wording.
1.0	29 th September 2016	Christina Bichan, Head of Transformational Change & Improvement	To reflect policy approval.
1.1	4 th October 2019	Kenny Low, Value & Sustainability Lead	Minor amendments to formatting and wording plus additional reference to virtual clinics
2.0	17 th October 2019	Christina Bichan, Head of Transformational Change & Improvement	To reflect policy approval.

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If you require this or any other NHS Orkney publication in an alternative format (large print or computer disk for example) or in another language, please contact the policy author:


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1 Introduction

- 1.1 NHS Orkney aims to provide care and services wherever possible within their Board area and as close to people's homes as is practicable. The normal expectation is that where the parent board for any given population can safely and effectively provide services for their population, they should do so. However given the remote and rural geography within the Board area, patients may have to travel some distance in order to receive care or treatment. Also, despite the wide and expanding range of quality services available with the Board area, the increasing specialisation in medicine and continuing advances in sophisticated equipment and technology have resulted in some services only being available in major centres, hence a need to travel to major population centres in Scotland and sometimes beyond to access these services.
- 1.2 This policy sets out NHS Orkney's objectives and responsibilities in relation to patient/escort travel, clarifying constraints and limits in relation to subsidy. It is based on Scottish Government guidance contained within MEL 1996 (70) "Patients' Travelling Expenses Schemes".
- 1.3 The policy is for use by NHS Orkney staff including GPs those who may be involved in authorising, and/ or administering patient travel for patients and their carer/escorts.
- 1.4 There are two schemes in operation in NHS Scotland to assist patients with travel costs associated with these attendances detailed as follows. All other residents in NHS Orkney not included in (a) or (b) below must pay their own travel expenses to get to hospital:
- (a) Patient Travel Scheme - all NHS Scotland patients are entitled to help with travel costs if they are in receipt of certain income based benefits. This assistance is not dependent on distance travelled. The benefits which currently apply can be found in Appendix 1.
- (b) Highlands and Islands Patient Travel Scheme - This scheme recognises that patients who are resident in the Highlands and Islands may be required to travel some distance to attend hospital appointments given the geography of the area. Under this scheme all patients from the former Highlands and Islands Development Board areas are entitled to financial assistance with their travel costs if they live more than 30 miles from the hospital they are attending or require to travel more than 5 miles over sea.
- 1.5 There are restrictions on who can claim and what can be claimed, these are set out in sections 4 and 6 below.
- 1.6 Acting outside these guidelines is considered to be Ultra Vires.


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2 Policy Statement

- 2.1 This policy applies to NHS Orkney. It is intended for use by NHS Orkney staff including GPs who may be involved in authorising and/or administering patient travel for patients and their carers/escorts.
- 2.2 Due to the nature of patient travel there may be unforeseen and unique circumstances not covered directly by this policy. In such cases the escalation pathway will be followed, set out in Appendix 3, where decisions will be made by applying the spirit of this policy. It should be noted that patients and their carers should NOT make representation to Executive or Non Executive Directors of the Health Board other than those mentioned within this Patient Travel Policy. In the event of any query in relation to an individual's travel this should first be addressed to the Travel Administrator who, if necessary, will escalate the query according to the Escalation Chart (see Appendix 3). Should the patient not be satisfied with any decision made they should make their complaint in writing in accordance with the NHS Complaints Policy. If the matter is clearly set out within this policy, the Travel Administrator will administer the policy accordingly, only exceptional circumstances will be escalated.
- 2.3 The principles referred to in MEL (1996)70 must be applied, that: "While clinical need remains paramount, there is a need for all staff, including clinicians, to seek to achieve value for money particularly with regard to the need to incur expenses for patient escorts".
- 2.4 At all times the Scottish Government Health and Social Care Directorates (SGHSCD) guidance shall take precedence. At the time of writing this is MEL (1996)70 and subsequent letters, which this policy is directly based on.
- 2.5 No travel can be authorised outside of SGHSCD guidance and NHS Orkney Code of Corporate Governance including the Standing Financial Instructions.
- 2.6 Given our geographic location and the potential detrimental health impact additional travel may bring to our patients, consideration should always be given to the use of virtual technology, where appropriate.
- 2.7 This document supersedes any previous policy or guidance.

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3 Policy Principles

3.1 The following principles will be applied when reimbursing travel expenses claims. The rates of reimbursement can be found in Appendix 2:

The Patient travel schemes are not designed to fully reimburse patients for the full cost of travelling to attend an appointment but to provide a contribution towards the cost.

- (a) Patients qualifying for financial assistance towards travel expenses under the Highlands and Islands Travel Scheme (i.e. as per section 1.4b above) are required to pay the first £10 of any claim. This will be deducted from the claim received following travel.
- (b) Patients and their carers/escorts (hereafter referred to as escorts) are expected to use the most cost effective means of transport suitable to their needs, taking into account the overall cost of the trip.
- (c) Relatives who accompany a patient on an air ambulance and do not fit the definition of an escort (see Appendix 4), will be responsible for their own accommodation and return journey. Travel on the air ambulance does not make an individual an escort.
- (d) Flights will only be authorised by the patient's GP or hospital consultant if the patient's health condition or disability warrants this or the overall cost of the trip is less than/comparable to if bus, ferry, car, train and necessary overnight accommodation is used.
- (e) Final judgement as to the cheapest and most reasonable means rests with NHS Orkney. It is the patient's responsibility to check in advance of travel if they are in any doubt.
- (f) All flights and ferries will be booked by NHS Orkney wherever possible; in exceptional circumstances however patients may be required to make their own travel arrangements. In this case, accommodation and other travel expenses should be paid for by the patient or escort and the costs reclaimed where eligible.
- (g) Should a patient use their own car mileage expenses can be reclaimed.
- (h) Only journeys actually completed should be claimed. Claiming journeys that have not been made is fraud and action will be taken against anyone submitting fraudulent claims.
- (i) Patients and escorts are encouraged to stay with family and friends where possible.

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4 Who can / cannot claim expenses

4.1 NHS Orkney is committed to ensuring that patients travel to and from hospital by the most appropriate and cost effective mode of transport and that any potential inconvenience and disruption is minimised.

4.2 Those that are entitled to claim for travel and subsistence costs under Highlands and Islands Travel Scheme are:

4.2.1 Patients

An individual referred and/or admitted as a non emergency to a hospital or clinic by a GP or consultant. Patients must be permanently resident within the Board area for patient travel subsidy to be offered in non-emergency cases.


4.2.2 AUTHORISED Escorts

4.2.2.1 These are adults regarded by a GP or consultant as being appropriate, necessary and responsible and not restricted in their abilities to support the patient during their travel between the home address and hospital, during the period of transport and/or accommodation, and/or during treatment. In general, an escort will only be approved for medical reasons. Escorts will also be approved where it is either not possible for the patient to travel safely alone or where the treating consultant makes a specific request. Further guidance on eligibility of escorts is provided in Appendix 4. Where patients do not have a suitable family member or friend to act as an escort, volunteer escort provision may be available from third sector agencies and further information can be obtained through the Travel Office.

4.2.2.2 Where a medical intervention may be needed, NHS staff may be allocated to act as escort. NHS Orkney staff will only provide an escort where the patient has an identified health need which may require specialist and regular attention during transfer, but does not necessitate an ambulance transfer. Staff escorts are a rare occurrence for planned appointments. The Scottish Ambulance Service has a medical team available within their vehicles and aircraft where this mode of transport is considered necessary.

4.2.2.3 If a conventional escort (not staff) is required, then a family member or friend may travel with the patient. The escort must be an adult who is fit to travel and be able to provide the necessary support to the patient. Escorts will have their expenses refunded based on the eligibility of the patient. Escorts must fulfil the purpose for which their travel was authorised. Expenses for any escort who does not accompany the patient completely as planned may not be reimbursed, and they may be required to repay any costs incurred on their behalf by the Health Board. Guidance on eligibility for escorts is provided at Appendix 4.

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4.3 Those that are not entitled to claim for travel and subsistence costs under Highlands and Islands Travel Scheme are:

4.3.1 Students

4.3.1.1 Students studying and living outside the NHS Orkney area are not eligible to claim expenses from NHS Orkney as they are considered to be ordinarily resident at the location of the academic institution and not at their NHS Orkney address.

4.3.1.2 Travel arrangements for students who are resident in a mainland address at the time of hospital appointment (emergency or non emergency) to an appointment in the Board area are also not eligible.

4.3.2 Visitors

There is no provision within NHS Orkney for the reimbursement of visiting expenses. However those in receipt of income based benefits may be able to obtain some help with visiting costs. Enquiries should be directed to your local DWP office.

4.3.3 Emergency Travel

Patients and relatives under emergency circumstances or who travel by NHS Ambulance travel are not eligible for reimbursement. This includes circumstances where an eligible patient may fall ill out with the board area. These circumstances are deemed emergency admissions and therefore do not come under the scope of this policy. For the costs involved with falling ill whilst away from your home, e.g. on holiday, it is advisable to consider the use of personal travel insurance, in advance of travel, to assist should these circumstances arise. However the Board is not responsible for advising on or dealing with insurance.


4.3.4 Transfers between treatment centres

Patients being transferred hospitals are not covered under the remit of this policy and costs are at the discretion of the hospital staff involved in the care and treatment of these patients.

4.3.5 Primary care and Private Appointments

Patients who are attending private appointments or attending primary care services such as their GP, dentist or pharmacist are not entitled to financial assistance.

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5 Specific Circumstances

5.1 Maternity Patients

5.1.1 Maternity patients who are medically required to stay close to hospital from 38 weeks until birth will be entitled to reimbursement of accommodation costs as per the overnight accommodation rates.

5.1.2 If the consultant or GP authorises an escort two round trips can also be claimed, one to take patient to hospital and one to collect the patients on discharge. Alternatively bed and breakfast expenses can be claimed for the escort whilst the patient awaits delivery up to a maximum of the cost of the return journey that would have been claimed had the escort not remained near the hospital.

5.1.3 The Highlands & Islands Patient Travel Scheme is unable to reimburse the travel and accommodation costs of partners who wish to be present at the birth of their child.

5.2 Long Term Treatment

5.2.1 Return travel will be paid for patients on long term treatment (more than two weeks), who are able to be discharged from hospital at weekends.

5.3 Continuous Treatment Patients

5.3.1 Continuous Treatment Patients claiming travel expenses under the Highlands and Islands travel scheme will not be required to pay the first £10 towards the cost of each return journey if they are undergoing continuous treatment. Continuous treatment only applies where patients are required to attend as an outpatient for a course of intensive treatment over a short period of time, i.e. more than one attendance per week for a course of treatment, e.g. a course of chemotherapy or radiotherapy or attendance for regular renal dialysis.


5.4 Emergency Travel

5.4.1 Travel and subsistence expenses in relation to emergency medical care are not covered by this policy or eligible for reimbursement under the Highlands & Islands Travel Scheme.

5.4.2 In most emergency situations patients are transported by the Scottish Air Ambulance (SAS), arranged directly between hospital clinical staff and SAS. When a patient has been flown away by SAS, they will be entitled to have their return journey funded and arranged by the Patient Travel Office, if the patient is well enough to travel by public transport (ferry/air). In the event the patient returns home by public transport (ferry/air), and an escort is authorised by a GP or consultant to accompany the patient on their return journey, then the costs associated with the return travel for both patient and escort will be reimbursed.

5.4.3 If a patient is transported by the SAS, the decision to have friends or relatives accompanying them falls to the Scottish Air Ambulance Crew and is not the

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responsibility of NHS staff. Travelling on the air ambulance does **not** make an individual an escort for the purposes of this policy and they will be responsible for their own accommodation and return journey expenses.

6 What Expenses Can Be Claimed

6.1 Transport

6.1.1 Patients and their escorts are expected to use the most cost-effective means of transport suitable to their needs, taking into account the overall cost of the trip.

6.1.2 Patients travelling by car - Patients travelling by car are entitled to be reimbursed for fuel expenses at the prevailing mileage rate subject to the following:

- (a) Only fuel expenses where a patient is in the vehicle is refundable, unless an authorised escort is travelling home following the patient's admission or travelling to hospital to collect the patient on discharge.
- (b) Should two patients who live at the same address have appointments on the same day in hospital, generally only one car journey will be refunded but exceptional circumstances will be considered. Where exceptional circumstances exist the patients must obtain approval from the travel administrator before the date of the appointments.

6.1.3 Patients travelling by Public Transport - Standard class bus and train fares can be reclaimed upon production of receipts.


6.1.4 Ferries - Patients will be expected to travel as a foot passenger unless:

- (a) The GP or consultant authorises a vehicle to be included in the booking if the patient requires this for medical reasons.
- (b) A car is essential for the completion of the journey due to the distance to hospital.

6.1.5 Flights – travel by air is the most frequently used form of travel for accessing mainland hospital services and is also permissible for internal travel (if authorised by the GP or consultant). Flights are permitted between Orkney and the British mainland for hospital appointments, provided this policy is compiled with and NHS Orkney books the flight.

6.1.6 For patients transported to hospital by air ambulance – it is the SAS's decision as to whether or not to offer a place on the air ambulance to a key relative/carer. Places may be offered if there is space; it does not affect the aircraft efficiency and does not impede clinical care. Patients transported to hospital by air ambulance will be entitled to have their return journey funded.

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Transport will be arranged by NHS Orkney. Travelling on the air ambulance does NOT make an individual an escort.

6.1.7 NHS Orkney will reimburse reasonable parking costs incurred at the time of the appointment.

6.1.8 In exceptional circumstances (and only with the approval of the Medical Director), a patient may receive treatment at a hospital or facility other than first preference of the Health Board. If this has resulted from a patient preference, then travel will only be refunded up to the cost of travelling to the normal hospital. Accommodation will be refunded to a maximum of the equivalent amount should the patient have attended the normal hospital. Travel in relation to private treatments is not refunded.

6.1.9 Taxis - due to the high cost of taxis all alternatives should be investigated – travel by taxi should be seen as the last resort. NHS Orkney will consider reimbursement of taxi costs in certain circumstances, for example:

- (a) There is no public transport available
- (b) Time restraints prevent the use of public transport
- (c) It has been approved by the patient's doctor due to mobility issues.

All taxi journeys must be approved prior to the taxi journey being undertaken.

6.1.10 Final judgement as to the cheapest and most reasonable means rests with NHS Orkney. Should there be any doubt it is the patient's responsibility to check with NHS Orkney in advance.


6.2 Accommodation

6.2.1 Patients and approved escorts will be entitled to have overnight stay costs refunded at the current rate per person per night, as detailed in Appendix 2, if the stay is unavoidable due to the time of the appointment, admission, or discharge.

6.2.2 Escorts who are authorised to travel to hospital with the patient must return home at the earliest opportunity, where possible undertaking the journey in one day. If they are to accompany the patient on the return journey and it would be more cost effective to remain off island rather than use another flight accommodation will be refunded. Otherwise those who choose to stay they must do so at their own expense.

6.2.3 Escorts who are required to accompany a patient to and from hospital may either return home and travel back to the hospital on the patient's discharge, or remain near the hospital where the patient has been admitted (provided the cost of accommodation does not exceed that of the second return journey which would otherwise have been required).

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- 6.2.4 Escorts accompanying children under 16 years will normally be provided with hospital accommodation free of charge. If this is not available, accommodation will be funded in accordance with the prevailing reimbursement rates.
- 6.2.5 Patients and escorts are encouraged to stay with family and friends where possible. Overnight expenses when staying with family and friends will be reimbursed at the family and friends overnight stay rate detailed in Appendix 2.
- 6.2.6 Patients or escorts who have been discharged and find their return journey unexpectedly delayed due to air travel delays, ferry disruptions or road closures will have their accommodation costs met up to usual limits, as described in Appendix 2. Patients who are travelling by air may be accommodated at the expense of the airline (they may also provide meal vouchers), typically if the delay is due to technical reasons. Patients are expected to accept any offers of accommodation in these circumstances; and patients and escorts are encouraged to stay with family and friends where possible, unless the cost of travel to and from the accommodation location would exceed the general accommodation allowance.
- 6.2.7 The decision regarding reimbursement of overnight expenses rests with the Travel Administrator who processes the form, taking into account the above rules.

7 What Expenses Cannot Be Claimed


- 7.1 The following cannot be claimed:
- (a) Loss of earnings
 - (b) Meals and refreshments
 - (c) Travel costs of patients who have become ill while abroad or away from their home address
 - (d) Parking fines
 - (e) Childcare Costs
 - (f) Car Hire (except where this is a lower cost alternative to public transport)

8 Claims

8.1 Making a Claim

- 8.1.1 Claim forms are available from hospital wards, clinics and the patient travel office. The form must be completed by the patient or escort and signed and certified as detailed on the back of the form. This includes certification of attendance on the dates shown on the form. The forms should then be handed into Central Reception at The Balfour for reimbursement or posted to the Travel Administrator. Plans to make this process electronic are being taken forward and this policy will be modified to reflect this once implemented.

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8.1.2 Proof of Entitlement - in all cases where full expenses are claimed, the patient or the patient's parent/guardian/escort will be asked to provide proof of entitlement before their expenses are reimbursed. Proof will be required on each occasion, as an individual's eligibility may change. The proof of entitlement must be dated within the previous 12 months. NHS Orkney reserves the right to contact the Department for Work and Pensions to confirm eligibility.

8.1.3 NHS Orkney will deduct the patient travel contribution (see Appendix 2) from expense reimbursements in instances where the patient cannot prove that they are eligible for the 100% subsidy.

8.1.4 In cases where it appears that a patient has deliberately applied for a subsidy to which they are not entitled the matter may be referred to NHS Counter Fraud Services for further investigation.

8.1.5 Advances - Patients who are unable to pay the initial cost of their travel should contact the patient travel office to request an advance of travelling expenses. Completed expense forms and receipts must be returned promptly to the travel administrator after attendance, or an invoice will be raised for the full amount of the advance. Failure to repay an advance may result in debt recovery procedures being instigated.

8.1.6 Retrospective Claims- Claims must be submitted within three months of attendance at hospital. Claims outside this time will not be considered for reimbursement except in very exceptional circumstances.

8.2 Validation of Claims

8.2.1 Evidence of a visit to a hospital should be obtained in every case, and without this NHS Orkney may withhold reimbursement. The travel claim form should be signed by a staff member at the place of treatment before being presented for payment.


8.2.2 Suspected Fraudulent Claims- In cases where it appears that a patient has deliberately applied for assistance with travel costs to which they are not entitled the matter will be referred to NHS Counter Fraud Services. Patient Travel staff may refuse to pay expenses in cash if they suspect a claim is fraudulent until further checks have been completed. This will result in delays in patients receiving their expenses.

8.2.3 Any suspicion of inappropriate (or falsification of) claims or improper use of Patient Travel will be referred to NHS Counter Fraud Services.

8.3 Missed Appointments

8.3.1 Patients should leave their home in sufficient time to ensure they arrive at the hospital in time for their appointment. If the patient arrives late, and cannot be

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seen they will not be entitled to reclaim their travel costs. Any patient who has had travel tickets arranged for them by NHS Orkney and is unable to attend their appointment should contact their Patient Travel office immediately. If it appears the appointment has been missed without good reason NHS Orkney will invoice the patient, escort or guardian for any costs incurred.

8.3.2 If a patient is unable for any reason to attend an appointment where travel has been arranged, they must contact the Patient Travel Office immediately. Where it appears that the appointment has been missed without good reason, NHS Orkney reserves the right to invoice the patient, escort or guardian for any costs incurred. Acceptable reasons for missing an appointment include:

- (a) Unavoidable travel delays, e.g. road closures or cancellation of transport. Patients **must** check in for flights if permitted to do so; and
- (b) Ill health. The patient should notify the responsible clinician immediately.

Similarly, where a patient, escort or guardian changes their travel arrangements after booking due to avoidable reasons NHS Orkney reserves the right to invoice the patient, escort or guardian for any costs incurred. Acceptable reasons for changing travel arrangements include:

- (a) Ill health of the patient, guardian or escort
- (b) Bereavement of a close family member or dependent.

9 Queries

9.1 Queries or Complaints In the event of a query, this should be directed to the Travel Administrator. If necessary, should the patient not be satisfied with the decision, the query will be escalated according to Appendix 3.

10 Equality and Diversity

10.1 Fair care is assured to all without any discrimination between persons on grounds of sex, marital status, race, disability, age, sexual orientation, language, social origin, other personal attributes, including beliefs or opinions, such as religious beliefs or political opinions. An equalities impact assessment has been undertaken in regards to this policy and is included in Appendix 5.


11 Patient Focus Public Involvement

11.1 NHS Orkney is working with patients and members of the public to improve the quality of health service provided.

11.2 A patient-focused NHS will:

- maintain good communications, including listening and talking to patients, public and communities;

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- know about those using the service and understand their needs;
- keep users of the service informed and involved;
- have clear, explicit standards of service;
- maintain politeness and mutual respect;
- have the ability to respond flexibly to an individual's specific needs;
- ensure effective action is taken to improve services; and
- talk with users, the wider public and communities.

11.3 Effective public involvement can:

- act as a catalyst for change;
- help achieve a major improvement in the health of the public; and
- help strengthen public confidence in the NHS.

12 Accountability and Responsibilities

This section describes the responsibilities of the various parties involved in patient travel.

12.1 Patients and Escorts

Patients and escorts are responsible for their own expenses incurred during their travel and need to be aware of limitations to entitlements. Patients will not receive payments for any expenses outside of this policy and must submit expense claims which will include any reimbursable escort costs. **Patients must familiarise themselves with the policy and eligible expenses.**

12.2 For all non-emergency transfers patients and escorts are reminded to take sufficient means of payment for the planned journey and the unforeseen delays that might occur. Patients must inform NHS Orkney of any mobility problems as soon as possible. Patients and their escorts are required to take some form of photo identification on all flights.

12.3 Patients should pay their own accommodation at the time of the stay, then reclaim (if permissible under this policy) from NHS Orkney.


12.4 Patient's Responsibility

It is the patient's / patient's representative's responsibility to clarify their rights and entitlement directly with the Patient Travel Office, before incurring expense.

Other NHS staff, including those based outside Orkney, may offer patients advice on travel arrangements, which may not be an accurate reflection of the NHS Orkney's travel system, entitlement and policy. Therefore any advice received out with the NHS Orkney's Patient Travel Office, should be confirmed directly with the Patient Travel Office before patients undertake travel.

12.5 **Medical Director / Director of Finance – Executive Director level responsibility.** It is reasonable to expect that this policy will not cover all


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eventualities and the Chief Executive / Medical Director will consider individual circumstances not explicit within the policy.

- 12.6 **Head of Hospital and Support Services** has overall responsibility for provision of patient travel service and procurement of travel services
- 12.7 **Head of Transformational Change and Improvement** is the budget holder for the patient travel service and will deal with updates to the Patient Travel Policy and escalation of non-clinical queries and complaints.
- 12.8 **Patient Travel Team** – operational responsibility for patient travel, staff and patient communications, and raising awareness.
- 12.9 **GP or consultant** – authorises travel of patient and/or escort and ensures compliance with eligibility (**Frequently the patient’s GP but may be a consultant from a secondary or tertiary centre**).
- 12.10 **All staff** – promote awareness of policy to patients and escorts and refer any queries to the Patient Travel Team.

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13 Implementation, Education, Training, Monitoring and Review

This policy is distributed to the following for information and action:

Name	Job title	Role and responsibility
Fiona MacKellar	Employee Director	Ensure staff visibility
David McArthur	Director of Nursing, Midwifery & AHPs	Ensure awareness within areas of responsibility
Marthinus Roos	Medical Director	Ensure GP and consultant awareness
Dawn Moody	Clinical Director GP	Dissemination to GPs to ensure awareness
Christina Bichan	Head of Transformational Change & Improvement	Policy updates Budget Holder External communications to raise public awareness
Malcolm Colquhoun	Head of Hospital and Support Services	Policy implementation by Patient Travel Office.
Judith Forbes	Orkney/Shetland Liaison Nurse, NHS Grampian	Awareness of policy to support and advise patients as required.

(a) Education and Training

None identified.


(b) Monitoring and Review

This Policy will be fully reviewed in 2018. Review of feedback received and associated complaints will be undertaken regularly to inform changes.

14 References

- Letter from David Palmer 7.04.03 – Patients Travel Expenses Schemes.
- Letter from David Palmer 8.10.04 - Patients Travel Expenses Schemes.
- MEL (1996)70.
- Letter from David Palmer (SEHD Deputy Director of Finance 7th April 2003).

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15 Appendices

Appendix 1: Entitlement to Subsidy

Partial Subsidy – patient not on income-based support

Partial subsidy is available if the distance travelled from the patient's home (or place of residence) to the hospital is 30 miles or more, or involves a journey by sea of more than 5 miles.

For patients eligible for partial subsidy NHS Orkney will fund reasonable travel expenses less the current patient contribution sum, which the patient has to pay (see Appendix 2). Should the journey cost less than the current patient contribution sum then no subsidy will be payable.

Patients holding an HC3 Exemption Certificate may be entitled to pay a lower patient contribution sum.

Full Subsidy – patient on income-based support

NHS Orkney applies government guidance in determining eligibility for full travel subsidy. At the time of writing, patients in receipt of the following are entitled to a 100% subsidy, irrespective of the 30 mile rule:

1. Universal Credit
2. Income Support;
3. Income-related Employment and Support Allowance;
4. Income-based Jobseeker's Allowance;
5. Pension Credit Guarantee Credit; and
6. NHS Tax Credit Exemption Certificate.

Full subsidy is also available to patients with an HC2 Certificate.

This is not an exhaustive list and will be subject to any changes in guidance from Scottish Government.


Full Subsidy – children and young people

The following are entitled to full subsidy if their parent or guardian meets the eligibility criteria shown in above:

1. children under 16;
2. young people aged 16-18 in full-time education; and
3. young people aged 16-18 and classed as a dependant of someone who meets the eligibility criteria.

Students studying and living outside the NHS Orkney area are not eligible to claim expenses from NHS Orkney as they are considered to be ordinarily resident at the location of the academic institution and not at their NHS Orkney address.

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Appendix 2: Charges and Fees Standard Tariff for Patients and Escorts

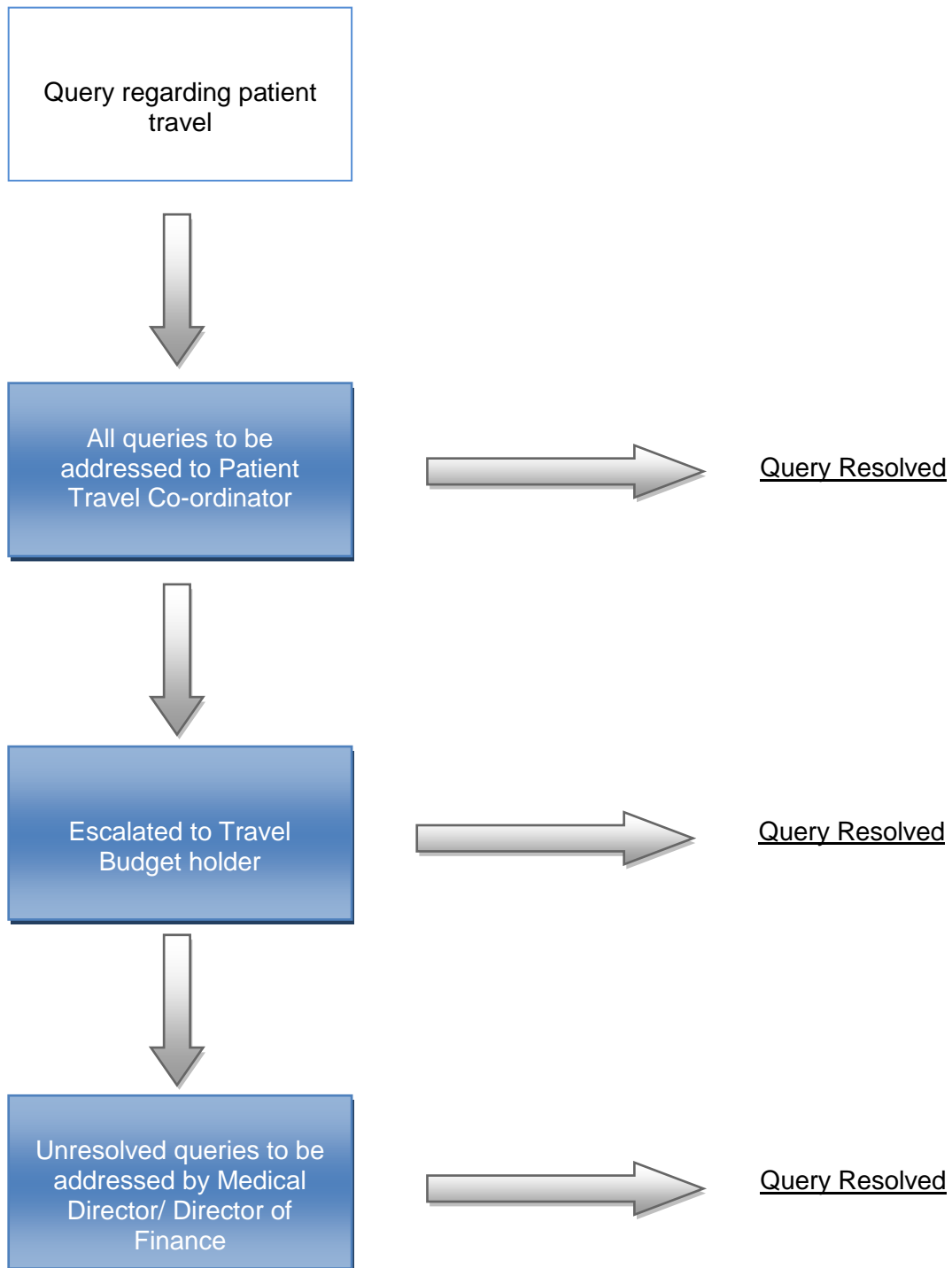
This part of the policy is subject to change and will be kept up to date by the Travel Coordinator. A list of the current standard charges and fees will always be available from Patient Travel Office and on the Health Board's web site.

Patient travel rates 2016/17	
Patient Contribution	£10.00
Mileage Rate – island	DWP Advisory Fuel Rates will be used – as at 1 st September 2019 this is 14p per mile for a petrol car with an average sized engine.
Mileage Rate – mainland	As above
Overnight rate (maximum) – bed and breakfast	£50 per night (single person) £36 per person, per night (two or more persons sharing)
Overnight rate – friends & family	£12 per night (first 14 nights) £6 per night (thereafter)


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Appendix 3: Escalation Pathway for Queries



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Appendix 4: Guidance for authorisation of Escort Travel by GP or consultant

When to authorise funding for an escort:

1. Escorts are funded if this is required for medical reasons, for example:
 - where the patient requires medication to be administered by another person during the journey;
 - where a frail, elderly or chronically ill person needs assistance;
 - where a person has significant disability (physical, intellectual, behavioural or emotional) that necessitates the support of another person;
 - where the patient lacks the mental capacity to take decisions or has a legal guardian;
 - where the patient is terminally ill (up to two escorts may be authorised if the patient is under 16).

2. Escorts are funded in other circumstances where:
 - the parent or guardian of a child under 16 years of age who accompanies them to the hospital. Only the travel costs of one escort will be funded, unless a clinician determines a **medical** reason for the child to be accompanied by two adults. There is no provision in this policy for siblings of the child patient to also travel with parent escort(s);
 - this is required for the safe transport of the patient; and
 - this is required to receive education/training critical to the continuing care of the patient at home, which cannot be delivered in the patient's local community.


Common cases where Escorts will not be funded:

1. Escorts are not funded for pregnant women attending a hospital, unless there is a medical reason, e.g. multiple births, complications, or an inability to lift.

2. The air ambulance may permit people to accompany patients on the aircraft. Authority to permit an escort on the air ambulance lies with Scottish Air Ambulance. This does not mean that the criteria for a subsidised escort have been met, and those accompanying patients in such circumstances may have to fund their own return.

The final decision on the authorisation of escorts rests with the Chief Executive or the on-call Executive Manager.

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Appendix 5: Equality Impact Assessment

Rapid Impact Checklist: Summary Sheet

Positive Impacts (Note the groups affected)

- Providing clarity and fairness to staff and patients where escorts will be supported
- Encouraging consideration be given to virtual consultation dependant on circumstances.

Negative Impacts (Note the groups affected)

- The policy is largely compliant but to comply with RNIB guidelines the document should be formatted to the left margin and text should be minimum font size 12
- There is a legal requirement to offer to make the policy available in another language or format. Usually this would be on the second page. An example from other policies within the organisation is:

'If you require this or any other NHS Orkney publication in an alternative format (large print or computer disk for example) or in another language, please contact the policy author:


Telephone: 01856 888 052

Or Email: kenny.low@nhs.net

Additional Information and Evidence Required

- It may be due to the document showing track changes but consider removing the blank pages.
- For consideration has the DWP Advisory Fuel rates changed since 2016?

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<p>Recommendations</p> <p>I have no further recommendations to this policy</p>
<p>From the outcome of the RIC, have negative impacts been identified for race or other equality groups? Has a full EQIA process been recommended? If not, why not?</p> <p>N/A</p>

Signature(s) of Level One
Impact Assessor(s)Rose Rendall.....

.....

Date:02/10/2019.....

Signature(s) of Level Two
Impact Assessor(s)

Date:

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