



Transporting clients or equipment in your own vehicle

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Introduction

Occupational therapy staff facilitating people to return home is a very important part of the rehab process, however the arrangements and policies around transporting clients and equipment vary greatly between organisations.

This briefing aims to inform BAOT members about the key points to consider if they are asked to transport clients or equipment in their own vehicle.

Transport options

Some examples of the type of transport arrangements an organisation may provide include:

- Local patient community transport service
- A pool/fleet car which is wheelchair accessible
- Taxi
- Ambulance
- The client or client's family arrange own transport (some clients may be eligible to have travel paid for or to have expenses reimbursed if they are receiving certain benefits).

Despite the alternatives outlined above, occupational therapists may be asked to transport clients and equipment in their own car. Agreeing to transport clients or equipment in your own car should be avoided unless your employer has made it clear that this is a necessary part of your job role and the correct support is in place.

If no suitable alternative has been agreed and you are required to transport clients in your private vehicle it is essential that:

- your job description or person spec clearly specifies your responsibility to carry clients or equipment in your private vehicle, or you have written authorisation from your line manager
- the vehicle is fully insured for the purpose
- a full risk assessment has been carried out, and
- the vehicle is suitable for the transportation of equipment, if necessary.

Insurance

If using your own vehicle for transporting clients or equipment is an essential part of your role then you should have your car insured for work use. Staff should not be required to transport passengers if they are not insured for the purpose.

OTs can be insured to carry clients or equipment in their cars if they have 'business use' specified on their private car insurance policy. Usually this kind of insurance will be at no extra cost. If you are required to pay extra then you should immediately raise this with your local UNISON branch to see if an agreement can be reached to have these costs met by your employer.



Make sure the insurance provider understands exactly what your role entails, so that you are fully covered in the event of an accident/incident. Some private insurance policies do not cover you if you are carrying equipment (such as a wheelchair or frame). If you are required to transport equipment in your car as part of your role make sure to check this with your insurers and raise any concerns with your UNISON branch and employer.

If you are driving a car owned or leased by your employer ask for confirmation that you are covered by the employer's insurance.

Mileage allowances

Staff who are required to use their own car, motorbike or bicycle for work use are entitled to mileage allowances or reimbursements. In some cases car users may also be able to claim 'passenger' allowances for carrying heavy or bulky equipment in a private vehicle.

For BAOT members working in the NHS, the mileage allowances are covered by Section 17 and Annex L of the Agenda for Change Terms and Conditions Handbook.

Staff in local authorities should look at the Green book – the national agreement on pay and conditions of service for local government services – as well as any local agreements on mileage that are in place.

Please note that the allowances listed in these national agreements are a *minimum recommendation* only and local agreements over and above these rates can be implemented.

Workplace policy

It is good practice for employers to have a policy relating to transporting clients and carrying equipment in cars. If you have a policy in your workplace check to see that it is fit for purpose and meets the needs of staff and clients. If there isn't a policy in place, seek to have one introduced in partnership between managers and your union staff side representatives.

Risk assessment

Health and safety should be at the heart of any workplace policy on transporting clients or equipment. The basis of UK health and safety law is the Health and Safety at Work Act 1974. The Act (and the various regulations and approved codes of practice made under it) put a duty on employers to ensure the safety, health and welfare at work of their employees and to ensure their activities do not endanger others.

Employers are required to carry out risk assessments, i.e. a careful examination of what, in a workplace, could cause harm to people, so that measures can be identified that eliminate or significantly reduce the risk of harm.

If the risk assessment shows that it is not possible for work to be done safely, then other arrangements must be put in place.

The risk assessment must be wide ranging and include all potential risks including:

- travelling to and from the home of the service user,
- suitability and maintenance of the vehicle,
- identifying potential hazards when carrying equipment, children or people with special needs,
- an agreed process for using escorts in the event there may be a risk to the health or safety of the client or driver



- appropriate health checks and training for drivers.

You may find the following UNISON guidance briefings helpful:

Risk Assessment: a guide for UNISON safety reps
(Stock No. 1351) <http://www.unison.org.uk/acrobat/11190.pdf> Accessed 18.05.2011

UNISON Health and Safety Representatives Guide
(Stock No. 1684) <http://www.unison.org.uk/acrobat/13605.pdf> Accessed 18.05.2011

Safer Driving at Work: a guide for UNISON safety reps
(Stock No. 1969) <http://www.unison.org.uk/acrobat/B566.pdf> Accessed 18.05.2011

Safe systems for handling and transporting equipment

Under the Manual Handling Operations Regulations 1992 employers are required to develop safe systems in regard to moving, handling and transporting equipment. These systems should be outlined in an organisation's health and safety policy. This includes the lifting, moving and handling of equipment in/out of vehicles, as well as reducing risks associated with carrying equipment including injury to the driver, passengers or vehicle.

Some helpful things to consider when drafting such a policy include:

- Identifying what alternatives are available to avoid transporting equipment in a private car, e.g. delivery by equipment store
- Carefully assessing what pieces of equipment can be safely carried either complete or broken down into parts. Each item of equipment should be assessed, clearly outlining how it should be handled and adequately secured. A thorough risk assessment is essential, especially if the equipment is not able to be contained in the car boot with seats in the normal position and the parcel shelf on
- If it is not considered safe to transport an item of equipment an Incident Form should be completed and the reasoning documented in the patient notes, if applicable
- Appropriate and safe gear to secure loads (e.g. straps, nets) is provided by the employer and there is a process for ensuring the gear is regularly inspected for wear or damage
- Details on what training is available to staff on safely handling equipment and using seatbelts, nets, straps or other means to secure equipment
- Any accident or near-miss relating to transporting clients or equipment must be recorded and reviewed
- Any equipment contaminated with body fluids must not be transported in a private car. Contaminated equipment should be transported within a designated vehicle or decontaminated in the patient's home



You can read further guidance on manual handling from the Health and Safety Executive at: www.hse.gov.uk

You may also find it helpful to read the Department for Transport code of practice on 'Safety of Loads on Vehicles' at: www.dft.gov.uk

To read more on this subject from an occupational therapy perspective, you may wish to read the following article:

'Is the Cost of Transporting Equipment too High?' by Jennifer Woolloff,
British Journal of Occupational Therapy, January 2003, 66(1).

Green travel

UNISON is committed to encouraging more sustainable travel to minimise harmful impacts on the local environment. Policies on workplace travel should aim to incorporate and promote increased walking and cycling and encourage travel by healthier, sustainable modes.

One example of how you can encourage green travel may be to talk to your employer about revising relevant person specs, so that car ownership is not an essential requirement of a job if individuals can undertake the same role on a bicycle.

For useful information on Green travel plans read *'Greening the Workplace: A UNISON guide to bargaining for greener staff travel plans'* which is available from www.unison.org.uk/green or order from UNISON Communications (Stock no. 2699).

Bicycles

A member of staff can be recognised as a designated bicycle user if they have agreed with their line manager that cycling will be their main method of transport while at work and they travel on a regular basis on business. Remember to check what allowances designated bicycle users are entitled to (see 'Mileage Allowances' above) and ensure your employer is providing secure, sheltered cycle parking and facilities for showering and changing.

The usual risk assessment procedures should apply to bicycles including identifying hazards, vehicle maintenance, relevant training, etc. You should not be required to transport bulky or heavy goods on your bike. If it is essential for you to carry equipment on your bike then your workplace policy should clearly identify what equipment is appropriate for you to carry and any adaptations (e.g. bike trailers) that may help to make this safe.

If using your bicycle for work it is recommended that you insure your bicycle against theft – for example, by amending your home contents insurance. It is also recommended that a cyclist have third party insurance for all business journeys. Some employers offer free third party cover to cyclists as part of their green travel plans.

Some workplaces have introduced the use of pool bikes. This may include the opportunity for staff to lease their own personal bike through a salary sacrifice scheme which can include savings in VAT, tax and national insurance. If your employer has a bike pool in place and you are using a pool bike rather than your own bike then your employer has a responsibility to provide safe equipment and third party cover.

For more information on the benefits of promoting the use of bicycles in your workplace see the Department for Transport Cycle to Work scheme implementation guidance at www.dft.gov.uk



Public transport

Guidelines for using public transport for work purposes should also be included in any workplace policy. Remember to check what travel allowances are available to staff using public transport for work purposes. The usual risk assessments should apply including identifying what equipment can be carried on public transport and if there are any provisions (e.g. trolleys) that can help make this safe.

Check whether your employer's insurance will cover those staff using public transport for business purposes - this is normally provided through the organisation's general public liability cover and is the same as that provided for walking while on work business.

Further information and support

If you have any specific health and safety queries, your branch health and safety officer or branch secretary can help. If you are unsure how to contact your local UNISON Branch, phone the UNISON Direct helpline on 0845 355 0845.

Additional health and safety information sheets and guidance can be found on the UNISON website at www.unison.org.uk

If you don't have an OT Steward in your workplace, then elect one

Every workplace should have a BAOT/UNISON Steward to represent the views and needs of occupational therapy staff. If you don't have a steward in your workplace then you should raise this issue at one of your team meetings. All OT Stewards are given accredited training and time off to carry out their duties. Please contact baotstewards@unison.co.uk for more information.