

Mystery shopping **Healthcare Travel Costs Scheme**



Healthwatch Islington

Healthwatch Islington is an independent organisation led by volunteers from the local community. It is part of a national network of Healthwatch organisations that involve people of all ages and all sections of the community.

Healthwatch Islington gathers local people's views on the health and social care services that they use. We make sure those views are taken into account when decisions are taken on how services will look in the future, and how they can be improved.

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Introduction

Healthwatch Islington received anecdotal feedback from users of the Healthcare Travel Costs Scheme. We heard that the process for making a claim for travel costs was complicated and inaccessible. We also heard that the scheme was not managed in a consistent way across the borough. One Healthwatch member told us that some, but not all, providers insisted on same day claims.

'My son, who is eligible to claim fares, was told at the Nuffield he could only claim on the day of his appointment. This was difficult given that he was allocated the last appointment of the day and the finance office closed at 4.30pm which was before his appointment time.'

Staff at the Nuffield Hearing and Speech Centre were unclear on an alternative means of making a claim when the cashier's office was closed.

University College Hospital (UCH) do not insist on same day claims. However the same individual felt that the process could be less complicated, or at least better signposted at the outset. 'When I tried to claim travel costs a few days after an appointment at UCH, I was told I needed a signed letter from the Outpatients department confirming my son had attended his appointment. It took me almost an hour to revisit the ward and obtain the signed letter.'

The Healthcare Travel Costs Scheme is part of the NHS Low Income Scheme. If it is difficult to make travel claims this will impact on members of the community who are already disadvantaged. Healthwatch Islington decided to investigate further, by mystery shopping the scheme.

The Healthcare Travel Costs Scheme

What is the scheme?

The Healthcare Travel Costs Scheme (HTCS) replaced the Hospital Travel Costs Scheme in April 2008 following the commitment made in the White Paper 'Our Health, Our Care, Our Say' to extend the scheme to 'include people who are referred by a health care professional for treatment in a primary care setting, providing that they meet the existing low-income criteria.'

The scheme is part of the NHS Low Income Scheme. Patients on benefits or low incomes can find it difficult to meet the cost of travelling to hospital or other healthcare premises for treatments or tests.

Eligible patients can claim payment of travel expenses to appointments made to receive non-primary medical and dental services, where they have been referred directly for that service by a doctor, dentist or medical consultant. They can also claim travel costs for their children, when their children have been referred to these services.

They are entitled to this assistance regardless of where the treatment is carried out, as long as it involves making an additional journey.

What can you claim?

- ▶ These reimbursements cover travel to and from a secondary care appointment.
- ▶ They can also cover the travel costs of a carer or escort if deemed necessary by the patient's doctor, consultant or other medical professional involved in the patient's care.
- ▶ They cover the 'cheapest reasonable method' of transport, which in Islington often means a single bus journey. However, it can also cover private motor vehicles and the scheme can refund for fuel per mile.

How and when should you claim?

The scheme allows for three ways of making a claim:

1. At the provider unit on the day of travel. To claim a refund, you must take your travel receipts, proof of appointment and your evidence of eligibility (eg. certificate or proof of benefit) to a nominated cashier's office to claim your cash reimbursement. You may make your claim on another day, as long as it is within three months of the date you are claiming for.
2. Retrospectively by completing a postal claim form (called an HC5 form) and posting this together with travel receipts to the NHS Business Services Authority. You can make a postal claim up to three months after the appointment has taken place. (Payments on the day of travel cannot be made at GP or dental practices).
3. In advance of travel. This is at the discretion of the medical professional.

'Patients need to have a clear and easy-to-use process through which they can obtain any payment of NHS travel expenses to which they are entitled, in a way that suits their needs. This process needs to reflect the fact that illness and treatment can leave people feeling vulnerable and in need of greater support.'

Healthcare Travel Costs Scheme Instructions and guidance for the NHS, May 2010

Mystery shopping methodology

Scenario 1 - Face to Face

'Hi, I had a hospital appointment here last week. I forgot to bring my proof of eligibility to claim for my travel costs. Can I still claim for them?'

We started by focusing on general and specialist hospitals. The challenge for service users had been that services had been inconsistent in their implementation of HTCS. So we wanted to find out whether reception staff and those in the cashier's office and Patient Advice and Liaison offices understood our questions and gave consistent answers.

We visited the general hospitals serving the borough and a selection of more specialised hospitals. Mystery shoppers posed as a patient, or a patient's relative, who had an appointment with the service the previous week but had forgotten to bring their proof of eligibility with them on the day. We asked if we could still claim for travel costs.

We visited nine hospitals (Appendix 1).

Scenario 2 - Telephone

'Hi, my neighbour is coming to your minor surgery clinic in a few weeks' time. She is getting quite anxious about how she is going to travel to the appointment. I know she has a form that means she gets her prescriptions for free, but it also says something about it covering travel expenses to appointments.'

We wanted to establish whether clinics (secondary care delivered in primary care facilities) had a system for claimants, as we knew they would not have cashier's facilities.

We used NHS Choices and GP practice websites to identify practices that offered clinics that you could attend only by referral (secondary care).

Mystery shoppers called the practices, saying that they were calling on behalf of a neighbour with a secondary care appointment. We asked each practice how our neighbour would go about making a claim.

We called 16 GP practices in total (Appendix 2).

Feedback from mystery shopping

Scenario 1 - Face to Face

These visits took place over a week at the end of September and the beginning of October 2015. During this week we visited nine secondary care services in Islington (or outside Islington but serving Islington residents).

We found that, by and large, hospitals all knew about the Healthcare Travel Costs Scheme and had similar systems in place. Most main receptions knew exactly what we were talking about (Royal Free Hospital, Nuffield, St Pancras Hospital, UCH, Highgate Mental Health Hospital, Royal National Throat Nose and Ear Hospital, and Eastman's Dental Hospital). If the main receptionist was not aware of the scheme they directed us in all cases to either the transport department (Moorfields Eye Hospital) or the cashier's office (Whittington Hospital).

The system at all the hospitals seemed to be that after your appointment (or up to three months after the appointment) the patient needs to visit the cashier's office with proof of appointment, entitlement certificate, and travel receipts. This could be for multiple appointments. The Nuffield was the only service to buck this trend and that was due to the fact it is not an NHS service, but they do take NHS patients – so the claim needed to be made next door at the cashier's office in the Royal National Throat Nose and Ear Hospital.

- ▶ Seven of the nine services we visited explained that we had three months in which to make the claim.
- ▶ In four cases it was suggested that we could come back and claim when we came for our next appointment (but no reference was made to a postal claim).
- ▶ Only three services mentioned that a claim could be made by post (Royal National Throat Nose and Ear Hospital, UCH and Nuffield). At these services we were given a form to complete (Royal National Throat Nose and Ear Hospital and Nuffield used the standard HC5 form. UCH had their own which came with a prepaid envelope).
- ▶ None of the hospitals explained that it was possible to claim for fuel costs (up to a specified amount per mile). However, this was made more clear on the UCH claim form.
- ▶ At two of the hospitals staff offered to look up the patients' details on the system to confirm they could claim (Highgate and Royal Free) although it wasn't clear whether, posing as a relative, the mystery shopper could make the claim for them.
- ▶ It was noted that almost all the hospitals lacked an alternative to the cashier's office, should that office be closed when you came to make a claim. In these cases a repeat visit would need to be made to claim the cost of one journey. The Moorfields Eye Hospital was the only exception.
- ▶ No service we visited suggested that a claim could be made at a different service if it was more convenient for the patient.

Scenario 2 - Telephone

These calls took place one morning in October. We called 16 GP practices offering secondary care services in primary care settings.

Mystery shoppers found that they had to wait sometimes for more than five minutes to speak to a receptionist.

We did not call more than these 16 practices as the outcome was the same in every practice we had contacted. No system existed for claimants attending secondary care services in primary care settings.

Of the remaining practices (those that we did not mystery shop), not all offered secondary care services.

- ▶ Our main finding was that none of the GP reception staff knew about the Healthcare Travel Costs Scheme. Not one of the practices we spoke to understood what we were referring to.
- ▶ Two practices said that reimbursement of travel expenses was 'for hospital appointments only' (Archway Medical Centre and St John's Way Medical Centre).
- ▶ Two other surgeries suggested that we went to the Post Office to claim, but neither of the mystery shoppers understood what was meant by that suggestion (Dartmouth Park Practice and The Village Practice).
- ▶ We were told by two practices that 'information about individual patients could not be given out to third parties' and 'we will not discuss any aspect of this without authorisation from the patient. This is because of Data Protection laws'. Both of these practices (The Miller Practice and Northern Medical Practice) seemed to misunderstand the question which could have easily been answered theoretically as it was not a personal question.

Recommendations



All hospitals should offer patients the option to claim travel costs by post, in cases where it is not possible to make an immediate claim at the cashier's office. Both ways of claiming travel costs should be clearly signposted.



Only University College Hospital included a prepaid envelope with their postal claim form. All hospitals should adopt this practice. This would ensure that patients on low incomes are not expected to pay postage costs when claiming reimbursement of their travel.



GP practices offering secondary care clinics need to make it possible for eligible patients to claim reimbursements under the Healthcare Travel Costs Scheme. The NHS travel claim form (HC5) should be made available at reception.



GP reception staff in particular need to be informed about the scheme and when it might apply to patients using their services. Messaging should stress that the scheme is not just for hospital appointments, and is for patients on benefits or low income (rather than those with limited mobility).



Islington Clinical Commissioning Group should provide a briefing for all GP practices about the Healthcare Travel Costs Scheme. This could also be disseminated via the GP bulletin.



NHS England should reword the information on NHS Choices. Currently it suggests that referrals made by GPs and dentists must be to a different premises to be eligible for the scheme. This is not correct. NHS England should also consider making the HC5 travel claim form a Freepost form.

Glossary

Mystery shopping

Healthwatch Islington has the right to visit services. A team of trained volunteers visited hospitals and phoned GP practices in September and October 2015. They posed as patients, or relatives and neighbours of patients. This practice of pretending to be a patient (or customer) is known as mystery shopping. In this case it enabled our volunteers to assess how well the hospitals and GP practices performed in terms of customer service and information provision.

Scenario

A fictional situation played out by our mystery shoppers.

Primary care

Health care provided in the community for people making an initial approach to a medical practitioner for advice or treatment. Primary care is associated with GP practices, pharmacies, dentists and opticians.

Secondary care

Health care provided by a specialist, or a special facility upon referral by a primary care physician. Secondary care requires more specialized knowledge, skill, or equipment than is generally available in primary care. Secondary care is associated with hospitals.

More recently, some secondary care services that have traditionally been located in hospitals have been moved out into the community. Many of these services are delivered at GP practices. However they are only available on referral and are still classed as secondary care.

Low Income Scheme

The NHS Low Income Scheme is intended to reduce the cost of NHS prescription charges, dentistry, sight tests, glasses and contact lenses, necessary costs of travel to receive NHS treatment, NHS wigs and fabric supports, i.e. spinal or abdominal supports or surgical brassieres supplied through a hospital.

Reimbursement

A repayment for money you've already spent.

Appendices

Appendix 1: List of hospitals visited by our mystery shoppers

1. The Whittington Hospital, Magdala Avenue, London N19 5NF

2. University College Hospital, 235 Euston Road, London NW1 2BU

3. The Royal Free London Hospital, Pond Street, London NW3 2QG

4. St Pancras Hospital, 4 St Pancras Way, London NW1 OPE

5. Highgate Mental Health Centre, Dartmouth Park Hill, London N19 5NX

6. The Nuffield Hearing and Speech Centre, 330 Gray's Inn Road, London WC1X 8DA

7. Eastman Dental Hospital, 256 Gray's Inn Road, London WC1X 8LD

8. Moorfield's Eye Hospital, 162 City Road, London EC1V 2PD

9. Royal National Throat Nose and Ear Hospital, 330 Gray's Inn Road, London WC1X 8DA

Appendix 2: List of GP practices phoned by our mystery shoppers

GP Surgery	Phone number	Secondary service
1. The Beaumont Practice	0203 316 8729	Dressings Clinic
2. The Rise Group Practice	0203 316 8710	Asthma and Diabetes Clinics
3. Stroud Green Medical Clinic	0207 272 4323	Minor Surgery
4. Hanley Primary Care Centre	0207 527 1500	Psychology; Drugs and Alcohol Service
5. St John's Way Medical Centre	0207 272 2714	Dietician
6. Archway Medical Centre	0207 272 0111	Chronic Disease management
7. The Northern Medical Centre,	0203 316 1800	Minor Surgery
8. The Village Practice	0207 700 6464	Minor Surgery
9. Dartmouth Park Practice	0207 272 1337	Minor Surgery
10. The Tufnell Surgery	0207 272 9105	Minor Surgery
11. Highbury Grange Medical Practice	0207 226 2462	unknown
12. Mildmay Medical Practice	0207 923 1999	Phlebotomy
13. The Miller Practice	0207 354 1972	Counselling
14. River Place Group Practice	0203 316 8444	unknown
15. Clerkenwell Medical Practice	0207 833 5906	Minor Surgery
16. Pine Street Medical Practice	0207 713 5256	Diabetes, COPD and Asthma Clinics



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