

Transfer insurance, cross-border and data sharing rules

Policy | PTR-POL-002

Document type	Policy
Title	Transfer insurance, cross-border and data sharing rules
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Prepared by	{{roles.quality_lead.name}}, Quality lead
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Effective date	{{document.effective_date}}
Next review	{{document.review_date}} (12 months, or sooner after any incident or change)
Replaces	None (new document)
Standards and criteria supported	System S6 (Patient transfers and referrals), criterion S6.44, S6.42, S6.43, S6.35
Evidence basis	E-006, E-009
Status of this document	Recommended best-practice model. A hospital may adopt, adapt or replace it with an equivalent that meets the same criteria.

At a glance: what to do

1. Insurance covers every segment, including air and the escort, and is confirmed before departure.
2. The escort's right to practise in the country of care is checked and documented.
3. Medicines and equipment crossing a border have the paperwork of both countries.
4. Patient data is shared under the data protection rules of both countries.

Stop and get help straight away if: a transfer departs with a segment uninsured, an escort who is not permitted to practise, or medicines with no border paperwork.

1. Purpose

To keep cross-border and multi-segment transfers lawful, insured and data safe (S6.44, S6.42, S6.43, S6.35).

2. Scope

Applies to	Clinical and support staff in the hospital
Locations	All wards, clinics and departments of {{facility.legal_name}}
When	Whenever the activity described is carried out
Does not apply to	Activities covered by another document listed in section 15

3. Definitions and abbreviations

Term	Meaning in this SOP
Clinical lead	The doctor or nurse in charge of the area at the time

4. Background and rationale

A patient moved across a border carries information that must be readable by the receiving team and must be protected. Records in a language the receiving team cannot read, or shared without data protection, cause harm and break the law.

5. Responsibilities

Role	Duties in this SOP	Competence needed
Accountable manager	Owns the policy and the insurance check	Management
Dispatch lead	Confirms cover and paperwork before departure	Trained dispatcher

6. Equipment, materials and resources

Item	Specification or standard	Check before use
Records and forms named in this document	Current version	Checked before use

7. Safety and infection prevention

- Stop and call for help if a patient is at immediate risk. Do not delay urgent care to complete paperwork.

8. Before you start

- Confirm the forms and equipment named in this document are available and current.

9. Procedure

Follow the steps in order. Where a step says "If", take the action for the case that applies. Do not skip a step. If a step cannot be done, use section 11 and section 12.

Step	Action	How to do it	Key point
1	Confirm insurance.	- Confirm cover for each segment and the escort in writing. - Record the confirmation on the transfer plan.	No cover, no departure.
2	Check practice rights.	Check the escort doctor and nurse can practise in the country of care, or that the arrangement permitting it is documented.	Permission is written, not assumed.
3	Border paperwork.	- Complete PTR-FRM-001 for medicines and equipment. - Keep the paperwork with the goods.	Paper travels with the goods.

Decision points

- No decision points in this procedure.

10. Special situations

Situation	What to do
Out of hours	Follow the same steps. Use the on-call contact on the wall of the area.

11. Problems and escalation

- Any serious problem goes to the duty clinical lead at once and to the clinical director the same day.

12. Monitoring and compliance

What is checked	Target	How often	Who	If the target is missed
Transfers with insurance	100%	Monthly	Dispatch lead	Escalate to accountable

What is checked	Target	How often	Who	If the target is missed
confirmed before departure				manager
Cross-border transfers with complete paperwork	100%	Monthly	Dispatch lead	Escalate to accountable manager

13. Records

Record	Where it is kept	Kept for
Record named in this document	Patient record or the area file	{{facility.records_retention_years}} years

14. Training and competence

- Staff are trained in this document at induction and refreshed each year, with a recorded competency check.

15. Related documents

ID	Title	Relationship
PTR-FRM-001	Cross-border medicines and equipment declaration	Form
HOS-POL-001	Medicines management policy	Policy

16. Evidence

ID	Source and status
E-009	ASF Expert Committee consensus.
E-006	ASF Policy Framework v1.2. Adapted.
E-009	ASF Expert Committee consensus.

EC = ASF Expert Committee consensus. Items marked EC are reviewed by the Committee each year.

17. Change history

Version	Date	What changed	Approver and signature
1.0	{{document.effective_date}}	First version	Pending Expert Committee approval