

NHS Grampian

Patient and Public Involvement  
Expenses Payment Policy

Updated August 2018

Approved by: PFPI Committee 9 November 2011  
Director of Corporate Communications: Laura Gray  
Implementation date: 1 January 2012  
Reviewed: August 2018 (minor revisions)

This policy is also available in large print, other formats or different languages on request. Please call the Public Involvement Team on 01224 558098 or email [gram.involve@nhs.scot](mailto:gram.involve@nhs.scot) if you wish to make a request.

### **Involving people in the production of this policy**

In March 2007, the original consultation draft of this policy was distributed to the 65 members of the NHS Grampian Community Forum, over 20 patient representatives on various committees, and members of the Patient Focus and Public Involvement (PFPI) Committee (now the Engagement & Participation Committee). In all 29, responses were received and the final version was endorsed by the PFPI Committee in April 2007.

In December 2009, three patient representatives and members of the Public Involvement Team, reviewed the policy. This revision also incorporates elements of the Scottish Government CEL 8 (2009): Guidance on Reimbursement of 'Out of Pocket' Expenses for Volunteers within NHS Scotland.

This policy was Impact Assessed on 28 January 2010.

This policy underwent minor revision following the publication of the Scottish Government CEL 23 (2011): Guidance on Reimbursement of 'Out of Pocket' Expenses for Volunteers within NHS Scotland.

This policy was updated with minor revisions in August 2018.

# NHS Grampian Patient/Public Involvement Expenses Payment Policy

## 1. Who this expenses payment policy is for

This policy is for patients and the public who give up their time to work with NHS Grampian on a variety of projects and groups. Every patient or member of the public involved in the work of NHS Grampian should have a named contact person who will be the first person to go to with any questions about this policy. If not, please contact the Public Involvement Team on [gram.involve@nhs.scot](mailto:gram.involve@nhs.scot) or 01224 558098 for any queries, or for any issues relating to being a patient or public representative.

This policy is to also inform NHS staff so that they have clarity on what patients and public representatives can expect as expenses. It is particularly important that the named contact person for representatives is familiar with this policy in order to provide accurate information regarding claims and expenses.

## 2. Why this expenses payment policy exists

NHS Grampian is committed to involving patients and the public in its work and supports the principle that people should not be out-of-pocket when working with the organisation.

## 3. When does this expenses policy apply?

This policy came into effect on 1 January 2012.

This policy covers most occasions when NHS Grampian will reimburse expenses. Usually these will be where NHS Grampian invites people to work with the organisation and asks them to confirm their intention to attend such events. This will include focus groups and consultation groups.

This expenses policy **does not apply** where the public attend a launch or event which is open to everyone (e.g. the public meeting of the Annual Review, Health Fair, Healthpoint events), or other meetings without specific invitation to assist in NHS business. However, there may be exceptions to this, for example, where a representative is involved on a project which ends in a public launch or specifically invited to attend the patient representatives' meeting as part of the Annual Review. If in doubt, please contact the Public Involvement Team at NHS Grampian on [gram.involve@nhs.scot](mailto:gram.involve@nhs.scot) or 01224 558098.

## 4. What expenses are covered?

### 4.1 The following expenses will be reimbursed, providing receipts are attached to the claim form:

- Mileage costs for use of a car at 45p per mile (receipts are **not** required)
- Mileage costs for use of a motorcycle at 24p per mile (receipts are **not** required)
- Passenger miles at 5p per mile per passenger when a representative takes another representative in their car to attend a meeting
- Mileage costs for use of a bicycle at 10p per mile
- Bus/coach fares
- Train fares (second class)
- Car parking fees
- Bridge tolls
- Ferry fares

NHS Grampian will still reimburse travel costs incurred when a meeting has been cancelled at short notice and where the representative was not informed of the cancellation before travelling.

It is the responsibility of representatives to ensure that their vehicle insurance policy covers their journeys as a result of their involvement with NHS Grampian and that their driving licence is valid. NHS staff may ask to see the vehicle insurance policy and driving licence.

### 4.2 Refreshments and meals (Day Subsistence Allowance)

When away from home for more than 5 hours including travel time, but not more than 10 hours, representatives can claim an allowance of up to £4.90. This is not payable if meals are provided. If making a claim, please enter the hours you have been involved with us that day, in the space provided on the claim form.

Where representatives spend more than 10 hours on NHS business including travel time, they can claim any allowance of up to £10.70. This is not payable where meals are provided. If making a claim, please enter the hours you have been involved with us that day, in the space provided on the claim form.

Please note that we require receipts for this expenditure.

### 4.3 The following expenses are also covered, but need to be agreed in advance with the named contact person at NHS Grampian:

- 4.3.1 Taxi fares – where there is no alternative transport or to avoid numerous changes of transport, or to avoid carrying heavy luggage or equipment. There may be other special circumstances when a taxi is required such as a disability. NHS Grampian will use discretion in dealing with requests. Receipts are required.
- 4.3.2 Childcare arrangements – if a patient/public representative needs additional childcare support as a result of working with NHS Grampian (e.g. child minder, crèche, nursery). The amount of reimbursement is subject to the current hourly childminding rate paid by the local authority. Childcare expenses will not be paid where NHS Grampian is providing crèche facilities (normally for children under 12 years of age). NHS Grampian recognises that there may be special requirements for childcare and will use discretion in dealing with requests.
- 4.3.3 Carer responsibilities – if a patient/public representative has caring responsibilities, then reasonable carer's expenses will be reimbursed to cover the cost of a temporary replacement.
- 4.3.4 Accompanying carer to assist representatives, including communication support – each request will be considered on an individual basis.
- 4.3.5 Overnight accommodation (up to a maximum limit of £55 per night). Wherever possible NHS Grampian should book any accommodation in advance. This allows us to pay it. Use of bed and breakfast or budget hotel accommodation is encouraged, but we will use discretion in areas where choice of accommodation is limited.

Where breakfast is not included this can be claimed for up to £7.50. Personal incidental expenses refer to items such as personal telephone calls.

The following expenses are covered when an overnight stay is required:

Accommodation:	£55
Breakfast (if not included in accommodation cost):	£7.50
Meals allowance (excluding breakfast):	£20
Personal incidental expenses allowance:	£5

Family members cannot claim for accommodation and meals **except** when they attend as a carer. Any carer's expenses must be agreed in advance.

- 4.3.6 Staying with friends allowance – if an overnight stay is necessary and the representative stays overnight in accommodation provided by friends or relatives, they can claim this allowance. Receipts are not required for the accommodation and meals provided.

Accommodation with friends/relatives and meals:	£25
Personal incidental expenses allowance:	£5

4.3.7 An allowance of £24.10 can be claimed for travelling overnight by train or boat. Once agreed, travel arrangements should be booked, whenever possible, in advance by NHS Grampian staff on behalf of the representative.

4.3.8 Kennel and cattery fees (up to a maximum of 2 days). Additional days will be at the discretion of NHS Grampian.

4.3.9 Expenses relating to lost earnings. If any payment is to be made, proof of earnings will be required and validated. The current minimum wage will be applied:

Aged 25 and over: £7.83 per hour

Aged 21 – 24: £7.38 per hour

Aged 18 – 20: £5.90 per hour

Under 18: £4.20 per hour

*Above rates apply from April 2018*

4.3.10. Expenses relating to membership of an ongoing group or committee. These should be discussed and negotiated with the named contact person at NHS Grampian. Each department or service is responsible for ensuring representatives are properly supplied with items such as paper, printer cartridges, postage, stationery etc. and reimbursed in part or full for these items where applicable. Costs for telephone calls should also be considered.

## 5. What expenses are not covered?

First class travel (but people can pay the difference between second and first class fares themselves).

Any parking fines incurred (including any fines issued on hospital sites) while working with NHS Grampian.

## 6. Advance booking of fares and accommodation

Travel to events or conferences outside the border of NHS Grampian must be discussed and agreed with the representative's named contact person. Once agreed, travel arrangements and accommodation should be booked, whenever possible, in advance by NHS Grampian staff on behalf of the representative. This will ensure NHS discounts will apply. If a representative has to book their own travel, their expenses **must** be agreed in advance. Standard fares and discounted rates should be used whenever possible.

If a representative is entitled to concessionary fares or free travel, advance booking by NHS Grampian staff may not be necessary. A representative may make their own booking in agreement with the named contact person. NHS Grampian will provide assistance with this if required.

## **7. Approaches from organisations outside NHS Grampian for patient or public representation**

Other organisations should make it clear what involvement they are asking representatives for. They should also be clear what expenses or payments are available.

If the request is coming from another organisation, it is expected that they will pay for a representative's travel and out-of-pocket expenses. If they are requesting a representative from NHS Grampian then this must be discussed with the named contact person or management.

If the organisation does not have its own expenses policy, or no clarity has been agreed on expenses, no assumption should be made that NHS Grampian will be able to refund these. It will be the responsibility of the representative to accept or decline the offer to be involved.

## **8. Can expenses be claimed while receiving benefits?**

Yes. Current benefit rules mean that a refund of expenses will not affect benefits. People are allowed to volunteer while claiming state benefits, including means-tested benefits. However, other payments such as speaker's fees may be seen as income. These payments could affect any benefit received.

Representatives are responsible for telling their benefits office if they are paid for anything other than a refund of travel costs or other out-of-pocket expenses.

All representatives should notify the benefits office where they make a claim before they offer their time to be involved with NHS Grampian. If benefits are claimed from more than one office, then all offices need to be informed. The benefits advisor will vary depending on the type of benefit received. For benefits regarding Council Tax Reduction and Housing Benefit, the contact will be the local council. Jobcentre Plus and The Pension Service can also provide information on benefits and volunteering.

There are no limits on the amount of time people can give as long as they continue to meet the conditions of the benefit or tax credit they are receiving. For example, those in receipt of Jobseekers Allowance must still actively continue to seek full-time work, be able to attend job interviews at 48 hours notice and be available to work at one week's notice.

Representatives can still volunteer if they are on Universal Credit as long as they also undertake any activities such as job searching, training or other requirements, identified by their Jobcentre Plus adviser. This is likely to be part of a claimant commitment.

This information was correct on 31 July 2018.

## 9. How are expenses paid?

We can assist people in completing the expenses claim form. We will also make sure that payment is made as quickly as possible but this can take up to 3 – 4 weeks. Payment is usually made by sending a cheque. However, if someone does not have a bank account, or where a delay in payment could cause financial difficulty, staff are asked to provide cash at the time of attendance at a meeting or event wherever possible.

Representatives who are involved in various projects and/or long term projects may wish to consider receiving payments direct into their bank account. To do this, representatives need to supply their bank details for payment via BACS (Banker's Automated Clearing Services). Please contact the Public Involvement Team on [gram.involve@nhs.scot](mailto:gram.involve@nhs.scot) or 01224 558098 if you wish to do this.

If expenses have not been reimbursed by 4 weeks, representatives are asked to contact their contact person and/or the manager of the project they are working on.

Expenses will be reimbursed on receipt of a validated and signed expenses claim form. Cheques will normally be issued by post.

The current rate of 45p per mile is the maximum amount patient and public representatives can receive without paying tax on this rate. NHS Grampian will review this rate in line with any future changes made by HM Revenue and Customs.

**Each department, service or project group within NHS Grampian is responsible for funding expenses payments.** Health & Social Care Partnerships (HSCPs) are responsible for funding their own expenses payments. GP practices that instigate projects involving patients need to seek clarity from their HSCP as to who funds any representatives' expenses.

The Public Involvement Team holds a small budget for reimbursement of expenses associated with the team's public involvement activities (e.g. NHS Grampian Public Involvement Network).

In exceptional circumstances staff should contact the Public Involvement Team if there are difficulties with funding expenses.

## 10. Reviewing this policy

This policy was approved by the NHS Grampian Patient Focus Public Involvement Committee at its meeting on 9 November 2011. It remains subject to review by this committee which is now called the Engagement & Participation Committee.

Future national policy may influence this policy and, as a result, rates may change together with what expenses will be covered. Representatives will be notified of any changes and this policy will be updated as appropriate.

This policy was updated in August 2018 with minor revisions.



## 11. How to complete the expenses claim form

- a. Your name and full address are required in order to send a cheque to you. All finance staff are governed by the same rules on confidentiality as healthcare staff and your details will be treated as confidential. Your telephone number or e-mail will only be used if we have a query about your claim.
- b. Please put the date and details for each meeting you attended in the first and second columns. **If you are working on different projects with different departments, please only submit one claim form for each department.** Each claim could be paid from a different budget and needs to be coded differently.
- c. 'Car mileage'. If you used your car, please write the total number of miles to the meeting and back again.
- d. 'Passenger miles'. If you have used your car to take another representative to the same meeting, please enter the total mileage and the representatives' name.
- e. 'Travel fares'. Please enter any expenditure on buses, trains, taxis or a combination of different types of transport. Receipts must be provided.
- f. 'Other expenses'. Please list any other things you have paid for such as meals, parking fees, childcare, carer's costs, accommodation etc. and then enter the costs in the next column. Please enter your time spent with NHS Grampian (including travel time) if claiming for refreshments and meals.
- g. Remember to include receipts for all expenses claimed (except for mileage claims).
- h. Add up the amounts you are claiming for in each column to create sub totals. Create a grand total in the bottom right hand 'Total' box (or leave blank if you want us to calculate mileage costs).
- i. Please sign the form and ask a member of staff to confirm your attendance. Ideally this should be done at the end of the meeting.
- j. Please return this form to your named contact person or the manager of the department you have been involved with. He or she will process your claim via our finance department.

You may wish to consider receiving your expenses directly into your bank account. To do this we will need your bank details for payment via BACS (Banker's Automated Clearing Services). Please contact the Public Involvement Team on [gram.involve@nhs.scot](mailto:gram.involve@nhs.scot) or 01224 558098 if you would like us to arrange this.

Lead author: David Cooper (Public Involvement Officer), Corporate Communications on behalf of the NHS Grampian.

NHS Grampian  
Revised August 2018

# NHS Grampian Patient & Public Involvement

## Expenses claim form



**Please read the instructions on pages 8 and 9 of the expenses policy before completing this form in block capitals. Receipts must be provided and be attached to this form where applicable.**

Name: \_\_\_\_\_ Address: \_\_\_\_\_

Postcode: \_\_\_\_\_ Telephone or e-mail: \_\_\_\_\_

Date	Details of meeting and venue	Car mileage	Passenger's name and number of miles	Travel fares	Other expenses (please list items and hours involved if applicable)	Cost of other expenses
		.....@45p per mile		£		£
		.....@45p per mile		£		£
		.....@45p per mile		£		£
<b>Sub totals:</b>		<b>£</b>		<b>£</b>		<b>£</b>
						<b>TOTAL</b>
						<b>£</b>

I declare that the above travelling and subsistence expenses claimed have been incurred by me. I further declare that no other claim for reimbursement from public or charitable funds has been nor will be made in respect of this claim.

Signature of patient/public representative: \_\_\_\_\_ Date: \_\_\_\_\_

**FOR NHS GRAMPIAN USE ONLY**

Verified by NHS Contact Person: \_\_\_\_\_ Designation: \_\_\_\_\_ Date: \_\_\_\_\_

Budget holder's signature \_\_\_\_\_ Budget code: 

N					
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PLEASE PRINT NAME: \_\_\_\_\_

Copy retained by Service/PI Team  Claim checked by Finance Department  \_\_\_\_\_ Date: \_\_\_\_\_