



**Yorkshire and the Humber**  
Clinical Senate

Free and full independent and impartial clinical advice

**YORKSHIRE AND THE HUMBER CLINICAL SENATE**

Patient & Public Involvement

# **Expenses Policy**

# **&**

# **Claim Form**

Version 3.0

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NHS England and NHS Improvement – North East and Yorkshire



## Expenses Policy

This policy is drawn from the NHS England and NHS Improvement policy “Working with our Patient and Public Voice (PPV) partners – Reimbursing Expenses and Paying Involvement Payments” (v2).

The work of the Clinical Networks & Senate involves a number of people outside the core team, including patients and public members. It has been agreed where people outside the core team undertake work on behalf of the Clinical Network & Senate, they are entitled to claim for the reimbursement of their travel costs and, in exceptional circumstances only, accommodation costs.

### Rail Travel

Rail travel will usually be booked and purchased by the Senate Administrator on behalf of public and patient partners, however we recognise that on some occasions this will not be possible. If travellers require a standard underground travel card, this can also be purchased via the Administrator.

### Bus Travel

Travel on buses and trams will be reimbursed, when accompanied by receipts or tickets quoting the price paid for travel.

### Taxi

Taxis may only be used where there is a justification on the grounds that it works out cheaper than other forms of transport, personal safety, disability or efficiency e.g. meetings in different parts of a city during the day or travelling with heavy items of luggage or late at night or where this is the only feasible mode of transport. Claims should be evidenced through receipts.

### Personal Vehicles

Rates of reimbursement are in line with Her Majesty’s Customs and Revenue Service (HMRC) recommendations, correct at HMRC website April 2017. When travelling by personal vehicle, the vehicle must have valid insurance, tax and an MOT certificate.

Public and patient partners, who necessarily incur charges in the performance of their duties, for example, tolls and congestion charges, will be refunded these expenses on production of receipts.

Public and patient partners are personally liable for any excess parking penalties, charges or fines issued to them and NHS England and NHS Improvement will provide no refunds for these charges.

Similarly, excess fare charges on any means of public transport are normally the responsibility of the lay member and not NHS England and NHS Improvement, unless it can be demonstrated that this was an unavoidable circumstance beyond their control.

HMRC approved mileage rates		
	First 10,000 business miles in the tax year	Each business mile over 10,000 miles in the tax year
Cars and vans	45p	25p
Motorcycles	24p	24p
Bicycles	20p	20p

### Carrying passengers on the same journey

If a passenger is carried (by car or van) to the same meeting, an additional 5p per mile can be claimed. This is in line with HMRC policy (correct at April 2017).

### Air Travel

All travel by aircraft will be at standard economy rate. Air travel can be booked through NHS England and NHS Improvement's travel system via the Senate Administrator. Any car parking and transfer costs will be taken into account.

### Accommodation

Accommodation requirements will usually be booked and purchased through NHS England and NHS Improvement's travel system via the Senate Administrator, although it is recognised that on some occasions this will not be possible.

### Assistance Animals

PPV partners who require the support of a guide/assistance animal will be booked into user friendly accommodation and any additional cost for their assistance animal will be covered by NHS England and NHS Improvement.

### Subsistence/Meals

If public and patient partners are involved in NHS England and NHS Improvement activity away from home for a considerable period of time, reimbursement may be claimed as detailed below. Receipts must be retained and submitted for the claim. The following rates may be claimed:

Breakfast (where leaving the house before 7am)	Up to £5
Lunch	Up to £5
Evening meal	Up to £15
NB: Maximum claim per 24 hour period	Up to £25

These rates include the cost of food and drinks, but in line with NHS policy, the purchase of any alcoholic drinks will not be reimbursed. Where refreshments and food are provided at meetings/NHS activities, subsistence allowances will not be paid.

*Please note tips (for example in restaurants or taxis) will never be reimbursed and remain solely at the individuals' discretion.*

## Carers and Support Workers

NHS England and NHS Improvement recognises that in some circumstances public and patient partners will need to arrange for carers/support workers to accompany them to a meeting, or to take over caring responsibilities while they are at a meeting (including child care, care of family members with disabilities). NHS England and NHS Improvement will meet the reasonable expenses/costs of carer/support workers, we will cover the travel/accommodation/ subsistence requirements of the carer/support worker who accompanies the lay member in line with the guidelines above. We will also cover the hourly costs of the carer/support worker where these costs are not normally covered elsewhere (for example, via service user support payments from other public funds e.g. social services). Where reimbursement is needed for carers/support workers, this is looked at on a case by case basis and should be agreed in advance with the meeting organiser.

Where NHS England and NHS Improvement is reimbursing the cost of care or support workers to support participants to attend, this should be delivered by a registered worker. For the avoidance of doubt, the carer or support worker is engaged by the public and patient partner and not by NHS England and NHS Improvement. NHS England and NHS Improvement will reimburse actual expenditure based on receipts submitted with expense claims. The receipt should provide details of the carer's registration and/or professional organisation providing the care.

## Office Supplies

NHS England and NHS Improvement recognises that many patient and public partners will make use of home office supplies as part of their involvement with us. These might include joining remote meetings via phone or internet meetings, or it might also include printing out papers at home that have been sent through via email. While patient and public partners can always request that hard copies of papers be posted to them at home, we understand that this is not always possible within the meeting timescales.

Where patient and public partners are engaged to support NHS England and NHS Improvement at meetings, events or workshops, we would expect paperwork to be posted out in advance or available on the day with time allocated for reading or working with this material.

However, where patient and public partners volunteer to support NHS England and NHS Improvement by participating in meetings remotely from their home we will offer a standing allowance of £5 per meeting to cover the cost of telephone calls, paper, printing ink and paper and home office sundries. We have taken this approach to reduce the administrative burden for lay members in for example, estimating proportionality of broadband usage, producing copies of monthly telephone bills, estimating ink used etc. Where this amount is being claimed, it must be agreed in advance with the meeting lead.

## Involvement Payment

If you participate in a clinical panel which requires a site visit or a meeting with your clinical panel members, you will be offered out of pocket expenses and an involvement payment of £150 per day (more than 4 hours) and £75 per half day (4 hours or less). Public and patient partners can refuse the payment or accept a reduced amount should they so wish. This involvement payment will always be agreed by the Senate Manager in advance.

The rates above are fixed and cannot be adjusted or divided up – there is no ‘hourly rate’ payment for public and patient partners.

Where a meeting or event is cancelled at short notice (48 hours or less) patient and public partners should receive a half day rate where they have already undertaken preparatory work and meeting/event papers and/or documentation has been issued. Any expenses already incurred will also be reimbursed.

Patient and public volunteers must be aware that accepting an involvement payment can affect individual’s entitlement to state benefits and/or health insurance benefits. You are advised to contact the relevant organisation prior to accepting the involvement payment.

To claim this involvement payment, you need to state ‘involvement payment’ under the details section of the expenses form and put the relevant amount (£75 or £150) in the other expenses category.

### **Process for Reimbursement of Expenses**

Patient and public partners seeking reimbursement of expenses must provide evidence of expenditure in the form of a receipt or ticket and can only reclaim their own expenses and not for expenses incurred by other colleagues.

Patient and public partners should submit claims in a timely manner, not more than three months after the event/activity that their claim refers to.

Where receipts are difficult to obtain (for example the use of Oyster cards or calls made on mobile phones) copies of bills or computer printouts with the relevant section highlighted can be accepted.

If receipts are lost, the lay member should discuss this with the meeting organiser.

Payments can only be made by cheque and claimants must include their name and the address to which they would like the cheque issuing. The rate of re-imbusement is defined by NHS England and NHS Improvement.

For the reimbursement of travel costs, claimants need to complete the following “Patient and Public Voice Participant Expenses Claim Form.



Signed (PPV participant): ..... Date: .....

Authorised for payment by (please print and sign): .....

Date: .....

Please email your claim form to [stephaniebeal@nhs.net](mailto:stephaniebeal@nhs.net) or post to Clinical Senate, NHS England and NHS Improvement, Oak House, Moorhead Way, Brampton, Rotherham S66 1YY, marked for the attention of Stephanie Beal.

Please note that you will be paid by cheque to the address that you have listed on your form within 14 days of receiving your claim form.

Approved mileage rates: Rates of reimbursement are in line with Her Majesty's Customs and Revenue Service (HMRC) recommendations, correct at HMRC website April 2017. When travelling by personal vehicle, the vehicle must have valid insurance, tax and an MOT certificate. <b>If a passenger is carried (by car or van) to the same meeting, an additional 5p per mile can be claimed.</b> This is in line with HMRC policy (correct at April 2017).		
From HMRC website	First 10,000 business miles in the tax year	Each business mile over 10,000 in the tax year
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