

Working with our patients - expenses policy

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Working with our patients - expenses policy

Policy overview

1. Introduction

NHS Birmingham and Solihull CCG is committed to involving patients, and members of the public, in all aspects of its work.

We recognise that local people give up their personal time to take part in surveys and meetings, to name but a few activities, and individuals incur costs in order to take part/participate.

Individuals could be patients, service users, carers, families and other members of the public. Individuals may have a general interest in the NHS, may have previously worked for the NHS or have direct or indirect experience of services.

We value the contribution that all individuals can make through giving their time, opinions, expertise and lay perspective.

2. Scope

This policy applies throughout NHS Birmingham and Solihull Clinical Commissioning Group (CCG) i.e. to all directorates and business functions, including hosted teams such as the Joint Commissioning Team.

It does not apply to other organisations, although they are welcome to adapt and use its content to shape their own policies.

This policy sets out some guiding principles and practice around reimbursing expenses. It applies to individuals such as, patients, carers and members of the public who help NHS Birmingham and Solihull CCG with our work.

This policy does not apply to our work with third sector organisations who we may work with to deliver patient and public engagement activity. We recognise that working with third sector organisations is hugely important as they bring valuable insight and input to our work.

This policy also does not apply to people working for NHS Birmingham and Solihull CCG. For example, expert advisers such as clinicians, scientific advisors, contractors or people working in other consultancy roles.

3. Who is this expenses payment policy for?

This expenses policy applies to individuals such as patients, service users, carers, families and other members of the public.

4. Why this expenses payment policy exists

This expenses payment policy exists in order to clarify and set out why and how the CCG reimburses expenses for patients and members of the public.

5. When does this expenses payment policy apply?

This expenses payment policy applies when an individual attends a CCG meeting such as a focus group, board meeting, event, project meeting.

6. What expenses are covered?

The following expenses will be reimbursed, providing receipts are attached to the claim form (unless otherwise stated):

- 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 20p per mile
- Bus/coach fares
- Train fares (second class only)
- Car parking fees
- Bridge tolls

The CCG 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 the CCG and that their driving licence is valid. NHS staff may ask to see the vehicle insurance policy and driving licence.

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 £5. 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 ten hours on NHS business including travel time, they can claim any allowance of up to £10. 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 receipts will be required for this expenditure.

Pre-agreed expenses

The following expenses will be reimbursed only with the prior approval of the CCG and on production of a valid receipt:

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. The CCG will use discretion in dealing with requests.

Childcare arrangements – if a patient/public representative needs additional childcare support as a result of working with the CCG (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 the CCG is providing crèche facilities. The CCG recognises that there may be special requirements for childcare and will use discretion in dealing with requests.

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. Costs for caring arrangements would normally be expected not to exceed £10 per hour. Accompanying carer to assist representatives, including communication support – each request will be considered on an individual basis.

Overnight accommodation (see below for details)

Loss of earnings (see below for details)

Overnight accommodation

Overnight accommodation will be reimbursed up to a maximum limit of £60 per night but must be pre-approved. Wherever possible the CCG should book any accommodation in advance.

This allows the CCG to pay it and avoid the need to reimburse expenses. Use of bed and breakfast or budget hotel accommodation is encouraged, but we will use discretion in areas where choice of accommodation is limited.

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

Accommodation: £60 as above.

Breakfast (if not included in accommodation cost): £5 per day.

Meals allowance (excluding breakfast): £5 per day.

Personal incidental expenses allowance: £5 per day.

Accommodation with friends/relatives and meals: £30 per day.

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

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.

Loss of earnings

If any payment is to be made, proof of earnings will be required and validated. Claims will be restricted to the current minimum wage rates, as follows:

Aged 25 and over: £7.83

Aged 21-24: £7.38

Aged 18 – 20: £5.90 per hour

Under 18: £4.20 per hour

Apprentice: £3.70

Expenses relating to membership of an ongoing group or committee.

These should be discussed and negotiated with the CCG. 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.

7. 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 the CCG.

8. Advance booking of fares and/or accommodation

Travel to events or conferences must be discussed and agreed with the CCG.

Once agreed, travel arrangements and accommodation should be booked, whenever possible, in advance by the CCG 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 the CCG may not be necessary. A representative may make their own booking in agreement with the CCG.

9. Approaches from third parties for patient and/or public expenses

This policy applies to CCG meetings/events only. If a patient is invited to a meeting/event that is being organised by another organisation/third party, then this policy would not normally apply. If a patient wishes to attend a meeting/event being organised by another organisation, they should in the first instance approach that organisation to enquire what their own reimbursement policy is.

If the organisation is requesting a representative from the CCG then this must be discussed with the CCG in advance of confirmation of attendance being issued.

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

Circumstances that are not clear will be reviewed on a case by case basis.

10. Can expenses be claimed whilst receiving benefits?

Yes.

Current benefit rules mean that a refund of expenses will not affect 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 the CCG. 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. 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.

11. How are expenses paid?

Expenses will be paid in a timely manner wherever possible, so to cause as little disruption to an individual as possible.

For amounts below £10, expenses will be paid from petty cash. Claimants will need to sign a form confirming they have received the reimbursement.

For amounts over £10, a bank transfer will be made, or a cheque will be issued through our Finance department to the nominated address. We will endeavour to make sure that payment is made as quickly as possible but this can take up to 3 – 4 weeks.

If expenses have not been reimbursed by 4 weeks, representatives are asked to contact the CCG via the member of staff coordinating their involvement.

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

12. Reviewing this policy

This policy was approved by NHS Birmingham and Solihull CCG Executive Team on 04 April 2018.

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.

13. How to complete the expenses claim form

Please provide as much information as you can on the expenses claim form, including:

- Your name and full address.
- Your telephone number and/or e-mail (in case of any queries). This is required in order to generate a payment to you. Please be assured that all staff are governed by the same rules on confidentiality and your details will be treated as confidential. They will only be used if we have a query about your claim.
- Your signature to verify the claim is true and accurate.
- Details of the meeting you attended including meeting name, location and date. If you are working on different projects with different departments, please submit one claim form for each department. Each claim may be paid from a different budget and needs to be coded differently.
- Type of travel cost e.g. bus fare, car travel mileage, parking costs.
- Other costs e.g. carers costs including number of hours and cost per hour.
- Receipts where appropriate.
- Add up the totals you are claiming and write the grand total in the bottom right hand box.
- 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 and either reimburse you from petty cash or via our finance department.

Please read the instructions within this expenses payment policy before completing the form in block capitals. Receipts must be provided and be attached to this form where applicable.

Appendix 1

Expenses claim form for patients and members of the public (not CCG staff)

Claimant details	
Name	
Address (for cheques)	
Bank sort code and account no. (for bank transfers)	
Email address	
Telephone number	
Signature	

Meeting/event details	
Name of event	
Location of event	
Date of event	

Travel costs to be claimed (e.g. parking cost)	Details of amount to be claimed (e.g. 5 miles @ 45p)	£

Other costs to be claimed (e.g. carers cost)	Details of amount to be claimed (e.g. 3 hours @ £8)	£

Grand total: £

Approval of claim For CCG use: Approving CCG Officer (budget holder) to complete	
Name	
Department	
Budget code	
Email address	
Telephone number	
Signature	

Finance details For CCG use: Approving CCG Finance Officer to complete	
Processed by: Name	
Date	

Please ensure this form is submitted to a member of the communications and engagement team either in person, email to bsol.comms@nhs.net or posted to:

Communications and Engagement Team
 NHS Birmingham and Solihull CCG
 Floor Four
 Attwood Green Health Centre
 30 Bath Row
 Birmingham
 B15 1LZ

Please ensure claims are submitted within three months.