



*South Gloucestershire
Clinical Commissioning Group*

**REIMBURSEMENT POLICY
ENABLING PATIENT AND PUBLIC INVOLVEMENT**

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1. BACKGROUND

- 1.1. South Gloucestershire Clinical Commissioning Group [CCG] is committed to working together with patients and the public to improve the health of people living in South Gloucestershire. This commitment is reflected in the CCG's Constitution [Section 4. Vision, Values and Aims] and the CCG's Patient and Public Involvement Strategy (2016-19).
- 1.2 Patient and Public Involvement (PPI) is about ensuring that patients, families and carers and the wider public have the opportunity to shape the development of local health services. It encompasses a whole range of different activities: from engaging the public in prioritisation and planning, and getting feedback about experiences, to providing information to patients and others about services.
- 1.3 For effective involvement, people need to feel supported, and for their contribution to be valued. There are many ways to do this including: being thanked; receiving acknowledgement; or seeing the improvements made as a result of people's involvement.
- 1.4 In valuing the contribution of stakeholders, the CCG recognises that it needs to remove the financial barriers that can prevent participation. Patients and public should not be out of pocket as a result of their involvement with the CCG so reasonable expenses will be reimbursed.
- 1.5 This policy describes how the CCG intends to support patients, carers and the wider public who are involved in helping it shape the development of health services.
- 1.6 In formulating this policy, we have:
 - Given due regard to the need to eliminate discrimination, harassment and victimisation, to advance equality of opportunity, and to foster good relations between people who share a relevant protected characteristic (as cited by the Equality Act 2010) and those who do not share it;
 - Given regard to ensuring equality of access to Patient and Public Involvement and;
 - Given regard to the need to reduce inequalities between patients: in access to healthcare services, and outcomes from healthcare services.
- 1.7 Throughout this document the term stakeholders is used to include patients, families and carers and members of the wider public that are involved in supporting the CCG's work.

2. PURPOSE

- 2.1 This policy describes the principles and practices for reimbursing stakeholders for their involvement in the work of the CCG.

3. SCOPE

- 3.1 This policy applies to stakeholders who help the CCG with its work and who are resident or work in South Gloucestershire.
- 3.2 This policy does not apply to paid staff of other organisations who are attending in their capacity as paid staff of that organisation
- 3.3 Reimbursement is made for patient and public stakeholders who have been invited to attend an engagement event or meeting relating to a specific project or work stream being delivered by the CCG. This could include work being undertaken at any stage of the commissioning cycle, including planning strategies, considering service changes, or providing input to procurement processes. Where reimbursement is available the eligibility and entitlement will be made clear to stakeholders at the point at which they are invited to attend.
- 3.4 Reimbursement is also made to attendees at IPEF and the PPG Network who are not attending in their capacity as paid staff of other organisations.
- 3.5 Reimbursement is not made for people attending CCG meetings held in public such as Governing Body meetings or the AGM.
- 3.6 The policy is to be implemented by members of staff employed by NHS South Gloucestershire Clinical Commissioning Group [CCG], or third party bodies or agencies acting on behalf of the CCG such as the South Central and West Commissioning Support Unit [CSU].

4 EXPENSES THAT CAN BE REIMBURSED

- 4.1 Reimbursement will be only available to those stakeholders indicated at 3.3 and 3.4 above, and in all case, stakeholders will be informed if they are entitled to claim reimbursement.
- 4.2 The types of expenses for which stakeholders will be reimbursed include:
- i) **Travel** within South Gloucestershire, Bath and North East Somerset, North Somerset and Bristol. Any travel outside this area must be approved in writing prior to travel by the Patient and Public Involvement Manager.
 - ii) The following types of travel will be reimbursed:
 - a) Car Mileage in line with Her Majesty's Customs and Revenue Service (HMRC) recommendations for volunteer drivers;
 - b) Public Transport [second class fare where applicable] when accompanied by receipts or tickets indicating the price paid for travel;
 - c) Taxis (by prior consent from the CCG) and where there is a justification on the grounds of:
 - Disability, where the nature of the disability requires this specific mode of travel;
 - Multiple people travelling to the same place and is cheaper than other forms of transport.
 - d) Car parking fee when accompanied by the parking ticket

- iii) **Carers and support workers:** 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). This must have prior approval by the Patient and Public Involvement Manager.
- iv) **Interpreters:** Cost of an interpreter/s if required. This must have prior approval by the Patient and Public Involvement Manager.

4.3 The schedule of rates to be applied will be that published on the CCG website. The schedule may be updated independently of this policy to take into account any guidance from HMRC and or inflation. A schedule of the current reimbursement rates is provided at Appendix 1.

5 CIRCUMSTANCES WHERE REIMBURSEMENT WILL NOT BE PAID

5.1 Reimbursements will not be paid in the following circumstances:

- Attendance at an open meeting such as a general public meeting
- Participation in open public surveys or consultations
- Where a stakeholder is employed by and is representing that organisation/group
- Where a stakeholder is already receiving reimbursement through other routes
- Travel from outside South Gloucestershire, Bath and North East Somerset, North Somerset and Bristol, unless by prior approval. Reimbursement will only be paid to cover those expenses from the stakeholder's place of residence or work to the location of the engagement event or meeting
- Parking fines or any other fines that may be incurred in attending a stakeholder event or meeting.

6 RESPONSIBILITIES

6.1 **NHS South Gloucestershire CCG Staff** must follow the terms and conditions set out in this policy;

- i) Staff have a duty of care towards stakeholders who become involved;
- ii) Staff are responsible for providing clarity to stakeholders about the scope of their involvement, and what reimbursement they can expect from the CCG;
- iii) Staff must only approve reimbursement on possession of the appropriate signed claim form and receipts.

6.2 Stakeholders

6.2.1 Some stakeholders may feel that they do not need or even should not be offered expenses. However, it is important that all stakeholders involved in the work of the CCG are clear about their entitlements, and that there is no stigma attached to claiming expenses

6.2.2 Stakeholders who are involved in the work of the CCG must follow the terms and conditions as set out below:

6.3 Reimbursements [Involvement Level 2 and Level 3]

- i) Stakeholders are required to choose the most cost-effective means available to them, for e.g. use of public transport wherever possible and practical;
- ii) Claims for reimbursement must be submitted using the approved claim form see Appendix 2 together with the appropriate receipts.
- iii) Stakeholders are responsible for declaring any income received to the relevant benefits office/agency and HMRC for tax purposes; see 6.4 and 6.5 below.

6.4 Stakeholders in receipt of Benefits

- 6.4.1 It is the responsibility of the stakeholder to comply with the conditions of their benefits. Amendments to the Social Regulations in 2009 allow service users and carers receiving benefits, to claim their out of pocket expenses [reimbursement] without affecting their benefit payments. However, as regulations and legislations are subject to change, the stakeholder is strongly advised to inform the relevant benefits agency and Jobcentre Plus as appropriate before they start.

6.5 Stakeholders [including those on benefits] and tax

- 6.5.1 Irrespective of whether a stakeholder is in receipt of benefits or not, reimbursements may be liable to tax and it strongly advised that they contact the local tax office to determine any tax liabilities.

6.6 Advice on benefits and tax

- i) Independent advice on the implications for tax and/or benefits can be sought from a range of advice agencies serving South Gloucestershire. Contact details for these agencies are available on the South Gloucestershire Council website at: <http://www.southglos.gov.uk/advice-and-benefits/welfare-rights-and-financial-advice/advice-agencies-and-welfare-advice-partnership/> or by telephoning 01454 865986.
- ii) Additional information may be available on the National Council for Voluntary Organisations (NCVO) website at: <https://www.ncvo.org.uk/> by typing: Volunteering and Benefits into the search box.
- iii) Guidance from the Social Care Institute for Excellence “Paying people who use services and carers who receive benefits and take part in involvement, participation and co-production” is available online at: <http://www.scie.org.uk/publications/ataglance/ataglance50.asp>
- iv) For general guidance on tax, HM Revenue and Customs guidance EIM71105 “Research volunteers, lay participants and participants in clinical trials” is available online at: <https://www.gov.uk/government/organisations/hm-revenue-customs> and by typing EIM71105 in the search facility.

7 CONSULTATION

- 7.1 This policy has been shared with the CCG’s Policy Review Group. The CCG’s Improving the Patient Experience Forum [IPEF] has endorsed the principles of reimbursement set out in this policy. IPEF includes

representatives from the voluntary sector, disability and race equality groups, carers and the local Healthwatch.

8 EQUAL OPPORTUNITIES/EQUALITIES IMPACT ASSESSMENT

8.1 An Equality Impact Assessment has been completed for this policy and procedure and it does not marginalise or discriminate minority groups.

9 IMPLEMENTATION PLAN (INCLUDING TRAINING & RESOURCES)

9.1 The policy will be implemented once the Quality and Governance committee have approved this policy. The policy will then be brought to the attention of staff via the staff newsletter and as part of any induction.

10. REVIEW DATE

10.1 NHS South Gloucestershire CCG will review and monitor this policy on a regular basis. The schedule of reimbursement rates may be subject to change independently of this policy to reflect changes in cost of living and any tax or benefit rulings.

11 AUDIT

11.1 A random sample survey of stakeholders who have been paid at the end of the year will be asked for their views on the effectiveness of the policy to include: access to the policy; clarity; ease of use; suggestions for improvement.

12 REFERENCES AND LINKS TO OTHER CCG AND NHS DOCUMENTS

i) References

- Health and Social Care Act 2012
- NHS Constitution 2013
- NHS England (2015) Working with our patient and public voice partners: reimbursing out of pocket expenses and involvement payments

ii) Links to other CCG Policies

- [Public and Patient Involvement Strategy \(2016-19\)](#);
- [Code of Business Conduct](#)

APPENDIX 1

SCHEDULE OF REIMBURSEMENT RATES

TYPE OF REIMBURSEMENT		RATES	ADDITIONAL NOTES
Travel	Car Mileage [Per mile]	£0.45	Based on HMRC allowance
	Motorcycle [Per mile]	£0.24	Based on HMRC allowance
	Parking	Actual cost	Receipt required
	Public Transport	<ul style="list-style-type: none"> ▪ Actual cost of bus fare ▪ For travel by train, second class train fare 	Receipt required
	Taxi - where no public transport is available or is suitable and only with agreement from relevant CCG officer	Actual cost	Receipt required
Interpreters [Includes British Sign Language and language interpreters]	Can be arranged by the relevant CCG officer on request.	£45 per hour. Additional time after the first hour will be charged in ¼ hour increments.	Interpreter must be qualified and registered, e.g. ASLI or equivalent for British Sign Language.
Substitute Care	Child Care	Actual Cost	Must be a registered child minder.
	Carers Relief	Actual Cost	n/a

PUBLIC PARTICIPATION EXPENSES CLAIM FORM

Name: _____
 Organisation: _____ (if appropriate)
 Home Address: _____

Meetings or events attended with date(s):

	Date	Miles	Amount
TRAVEL EXPENSES (PLEASE DETAIL) Notes • Mileage: Car @ 45p per mile; • Parking - Actual Parking Costs [Receipt/tickets required]; • Public transport - [train fares at second class rate only; Receipts / tickets will be required]; • Taxi - Actual cost and by prior agreement with the relevant officer [receipts will be required]			
OTHER EXPENSES (please provide receipts) Interpreter Costs Substitute Care (★) ★ if for Child-minder, then must be a registered child-minder			
Total			

Please provide your bank details if you wish the expenses to be paid into your bank directly:

Bank Name: _____ Sort Code: _____
 Account Name: _____ Account Number: _____

Or

Please pay expenses by cheque to the address above

- I declare that the above is a true record of my expenses and entitlement for participation at this meeting / event.
- I understand that I am solely responsible in declaring the above monies to the appropriate Benefits agency and/or HM Revenue and Customs.

Signature of Claimant:Date:

Signature of officer approving payment:Date:

Please send completed form to the authorising officer

Please return completed form to:

Alison Enever

FREEPOST RTEY-GAZK-LYBR

NHS South Gloucestershire CCG

Unit 11-14, Corum Office Park

Warmley

BS30 8FJ

IMPORTANT NOTES:

- 1** Payment can be sent by cheques **or** can be made by bank transfer and bank detail must be provided.
- 2** If you are on benefits and want to ensure that they are not affected you may wish to contact local Volunteer Development Agencies who **may** be able to advise you:
 - Kingswood - **0117 960 0376** or info@volunteeringkingswood.org.uk
 - Patchway, Filton & Stokes - 01454 868986 or info@volunteercentre-pfs.org.uk
 - Yate - 01454 324 102 or volunteering@volunteercentreyate.org.uk
 - Thornbury - 01454 413392
- 3** For information on whether payments and expenses affect you tax allowances please contact Her Majesty's Revenue and Customs on 0845 300 0627 and ask to speak to your local tax office.