

Patient and Public Voice Partners (PPV) & Volunteer Expenses Payment Policy

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1. Introduction

- 1.1. This policy supplements the Prime Financial Policies of the Constitution.
- 1.2. It expands upon the **Prime Financial Policy number 19**, which requires the Clinical Commissioning Group (CCG) to put controls in place to manage non pay expenditure.
- 1.3. The CCGs consider working in partnership with patients and the public to be central to the way that we work. We are committed to ensuring that public and patient voices are at the heart of shaping our healthcare services. By using the term **“patients and public voice (PPV) partners”** we include service users, carers and relatives of patients, and the general public. Public and patient voices should be embedded into our commissioning processes in a range of ways, including gathering insight and feedback to shape services, embedding voices in the governance frameworks of our programmes, working with patients and the public to jointly design and develop services. We sincerely value the significant contribution that patients and the public make towards improving our NHS.
- 1.4. This policy is for patients and the public who give up their time to work with the CCG on a variety of projects and groups. This policy is to also inform NHS staff so that they have clarity on what PPV partners can expect in reimbursing expenses.
- 1.5. Payment of out of pocket expenses is a direct cost, and all expenditure must be accounted for within normal operational budgets. It is essential therefore to have clear systems and guidance for volunteers and for staff supporting volunteers.

2. Purpose

- 2.1. The CCGs actively seek patient and public input to inform and improve our work. We will do this through a wide range of approaches, including asking people to work in partnership with us to develop our policies and programmes of work and be part of our governance and assurance processes. The CCG is committed to the principle that people should not be out of pocket when working with the organisation.
- 2.2. This policy covers most occasions when the CCG will reimburse expenses. Usually these will be where the CCG invites people to work with the organisation and asks them to confirm their intention to attend such events, including focus groups and consultation groups.
- 2.3. 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 CCG Governing Body), or other meetings without specific invitation to assist in NHS business.
- 2.4. An individual has the right to choose whether they wish to claim reimbursement for expenses they have incurred.

3. Equality and Health Inequalities Statement

- 3.1. This document forms part of the CCGs’ commitment to create a positive culture of respect for all employees and service users. The intention is to identify, remove or minimise discriminatory practice in relation to the protected characteristics (race, disability, gender, sexual orientation, age, religious or other belief, marriage and civil

partnership, gender reassignment and pregnancy and maternity), as well as to promote positive practice and value the diversity of all individuals and communities.

4. Expenses included in Scope

Travel Costs

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

- Bus/coach fares
- Train fares (second class only)
- Car parking charges
- Bridge tolls
- Mileage costs as per table below:

Approved mileage rates for business miles in a tax year (receipts not required)	First 10,000 miles	Over 10,000 miles
Cars and vans	45p	25p
Motorcycles	24p	24p
Bicycles	20p	20p
Passenger miles when a PPV partner takes another PPV partner in their car to a meeting	5p	5p

4.2. The CCG will still reimburse travel costs incurred when a meeting has been cancelled at short notice and where the PPV partner was not informed of the cancellation before travelling.

4.3. When travelling by personal vehicle, PPV partners must 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. The vehicle must also have valid road tax and an MOT certificate if required. NHS staff may ask to see the vehicle insurance policy and driving licence for verification.

Pre-agreed Expenses

4.4. 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 PPV partner 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. The CCG recognises that there may be special requirements for childcare and will use discretion in dealing with requests.
- Carer responsibilities, if a PPV partner 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 PPV partners (including communication support), each request will be considered on an individual basis.

- 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 PPV partners are properly supplied with items such as paper, postage, stationery etc as required. Costs for telephone calls should also be considered.
- Overnight accommodation, see section below.

Overnight Accommodation

- 4.5. Overnight accommodation will be reimbursed up to a maximum limit of £100 (inclusive of VAT) per night, but must be pre-approved. It may be possible for the CCG to 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.
- 4.6. The following expenses (receipts will be required for this expenditure), inclusive of VAT, are covered when an overnight stay is required:

Expense Type	Maximum Limit
Accommodation (Outside London)	£100
Accommodation (London only)	£150
Breakfast (where leaving house before 7am)	£5
Lunch	£5
Evening Meal	£15

- 4.7. If meals are provided at meetings/NHS activities, subsistence allowances will not be paid.

5. Expenses not included in Scope

- 5.1. The following expenses will not be reimbursed:
- Any lost earnings.
 - First class travel (NB: individual can pay for the upgrade from a 2nd to 1st class fare).
 - Any parking, speeding or other fines incurred (including any fines issued on hospital sites) while working with the CCG.
 - The purchase of any alcoholic drinks.

6. Working in Partnership with other Organisations

- 6.1. PPV partners may be involved in working with a number of organisations, for example with the CCGs, or a local authority, voluntary sector organisations, other Clinical Commissioning Groups and/or NHS England. If the PPV partner is claiming expenses from one organisation for involvement in a specific piece of work, they may not claim expenses from other organisations for the same piece of work. For example, if PPV partner attends a workshop that is jointly delivered by Slough CCG and Bracknell & Ascot CCG, the PPV partner can only claim their expenses from one CCG, not both.
- 6.2. When the CCG is working jointly with other organisations (for example Local Authorities, other CCGs, NHS England), it should be made clear in advance which organisation is responsible for the PPV partner's expenses. The expenses policy

implemented in these circumstances will be that of the lead organisation that is responsible for paying the PPV partner's expenses.

- 6.3. The CCGs may also seek to commission additional engagement activities through work with partner organisations, for example voluntary sector organisations who work with seldom heard communities.

7. Carers and Support Workers

- 7.1. The CCGs recognise that in some circumstances, PPV 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). The CCG will meet the reasonable expenses/costs of carer/support workers; we will cover the travel, accommodation and subsistence requirements of the carer/support worker who accompanies the PPV partner in line with the guidelines in section 4 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).
- 7.2. 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.
- 7.3. Where the CCG is reimbursing the cost of care or support workers to support PPV partners to attend, this should be delivered by a registered worker. For the avoidance of doubt, the carer or support worker is engaged by the PPV partner and not by the CCG. The CCG 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.

8. Interpreting, British sign Language and other communication support

- 8.1. In general, communication support should be arranged as part of the meeting / event and should look to include interpreters or other forms of communication support in line with audience requirements. Where individuals have specific / complex needs, and prefer to arrange their own support, provision should be made to reimburse these costs and this must be agreed in advance.

9. Claiming Expenses while receiving Benefits

- 9.1. Rules and regulations around receiving income while in receipt of benefits vary significantly according to individual circumstances, because of this we do not intend to provide detailed information on the different conditions for individual benefits in this policy. Individuals will have a responsibility to ensure that they have checked with the relevant agencies. A person should also speak to their benefits advisor or Jobcentre Plus to discuss their individual circumstances.
- 9.2. Current benefit rules mean that a refund of expenses should not affect benefits. PPV partners 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.
- 9.3. All PPV partners 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.

- 9.4. 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. If a person, even inadvertently, breaches their benefits conditions in some way while offering their help through involvement, this could have serious consequences for the individual. It is the responsibility of the individual and not the CCG to comply with the conditions of their benefits.

10. Payment Process

- 10.1. PPV partners seeking reimbursement of expenses must provide evidence of expenditure in the form of a receipt or ticket, and can reclaim only their own expenses, not expenses incurred by other colleagues. A template of the **“Non Staff Expenses Claim Form”** is provided in **Appendix B**. Guidance on completion of this form is provided at **Appendix A**.
- 10.2. Expenses will need to be approved by the appropriate CCG manager and only reimbursed on receipt of a validated and signed **“Non Staff Expenses Claim Form”** (**Appendix B**).
- 10.3. Payment to individuals for small amounts (less than £50) will usually be made in cash via the specific petty cash float held by the Communications and Engagement Team.
- 10.4. Payment to individuals for claims over £50 are likely to be very exceptional, but in such circumstances will be made via bank transfer (where account details are supplied) or by cheque, posted to the address provided on the **“Non Staff Expenses Claim Form”** (**Appendix B**).

11. Fraud and Bribery

- 11.1. If an individual provides false documentation, this will be dealt with under the Counter Fraud & Corruption Policy Response Plan 2015.

12. Reviewing the Policy and Date

- 12.1. Future National Policy may influence this policy and rates may change together with what expenses will be covered, including changes in HMRC Legislation. PPV partners will be notified of any changes and this policy will be updated as appropriate.
- 12.2. This policy will be subject to review every 3 years.

HOW TO COMPLETE THE EXPENSES CLAIM FORM

- a) Your name and full address are required in order to generate a payment to you. All finance staff are governed by the same rules on confidentiality as other NHS 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 name details and date for the meeting you attended in the spaces provided. 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) 'Public Transport Costs'. Please enter any expenditure on buses, trains, taxis or a combination of different types of transport to get to the meeting.
- d) 'Mileage'. If you used your own vehicle, please write the total number of miles to the meeting and back again. Include any car parking fees paid.
- e) 'Additional Passengers'. If you have used your vehicle to take another PPV partner to the same meeting, please enter the total mileage and the PPV partners' name.
- f) 'Subsistence'. Please list any costs you have paid for such as accommodation, meals, etc. Please enter your time spent with the CCG (including travel time) if claiming for refreshments and meals.
- g) 'Carer/support Worker'. Please enter any expenditure incurred on carer's you have paid for, in order to be able to attend the meeting.
- h) 'Other out of pocket'. Please enter any expenditure incurred on childcare or interpreters to be able to attend the meeting.
- i) Remember to include receipts for all expenses claimed (except for mileage claims).
- j) Add up the amounts you are claiming for in each section and create the sub totals against each category in the Total Claim table. Then create a grand total in the bottom right hand 'Total Claim (£)' box (or leave blank if you want us to calculate mileage costs).
- k) 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.
- l) 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.

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



East Berkshire
Clinical Commissioning Group

NON STAFF EXPENSES CLAIM FORM

Name		Telephone Number	
Email		Date	
Address			

Meeting Title	
Meeting Date	

1. Public Transport Costs				
	From	To	Date	Cost £
Bus travel				
Train travel				
Taxi*				

*Agreement required in advance from meeting organiser.

2. Mileage Claim For Using Own Vehicle				
	From	To	Miles	Amount Claimed £
Car / Van (45p/mile**)				
Motorcycle (24p/mile)				
Bicycle (20p/mile)				
Additional Passenger (5p/mile)				
Name:				
Car Parking charges				

**45p per mile up to a maximum of 10,000 miles per year, then 25p per mile

3. Subsistence***			
Meal claimed	Time From	Time To	Amount Claimed £
Accommodation			
Breakfast (Up to £5.00)			
Lunch (Up to £5.00)			
Evening Meal (Up to £15.00)			

***Not payable where refreshments provided at meeting or event.

4. Carer / Support Worker Expenses				
Name of Carer/ Support Worker****	Time From	Time To	Hourly rate	Amount Claimed £

**** The receipt should provide details of the carer's registration and/or professional organisation providing the care.

5. Other Out of Pocket Expenses*****		
	Details	Cost £
Childcare		
Interpreter		

*****To be agreed in advance with meeting organizer

Total Claim	
Category of claim	£
1. Public Transport	
2. Mileage	
3. Subsistence	
4. Carer/Support Worker	
5. Other	
Total Claim (£)	

PPV partner Declarations (Signature confirms your agreement to all declarations stated):

- I confirm**, that the above expenses have been incurred as a result of working in partnership with the CCG and they comply with the CCG PPV expenses guidance.
- I confirm**, that the motor vehicle for which I have claimed a mileage allowance above is insured, the vehicle is maintained at all times in roadworthy condition and complies with the requirements of the Road Traffic Acts, and I hold a valid driving licence.
- I confirm**, that if I have received a payment for any work done, I understand that I am responsible for declaring this income to HMRC or other income providers eg: relevant benefits office Jobcentre Plus, or insurance companies who may provide income to individuals.

Signature of PPV Claimant:

Date:

Approval of Claim (For CCG use: Please enter details of Officer approving the claim)

Name:	
Post:	



Contact Number:	
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