

Health Innovation Oxford & Thames Valley Payment Policy for Patients and the Public



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With thanks

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1. Introduction

We are committed to involving patients, carers, and the public as active partners in our work. To ensure that there is consistent approach to payment, and that our public partners are treated equally, this document sets out our policy for payment of expenses, and payment for time spent undertaking involvement activities.

2. Terminology

'Public partner'¹ refers to patients, carers or members of the public who are involved in activities with the [Health Innovation Oxford & Thames Valley](#)/or with our partner organisations in the Working Together Partnership. Involvement activities can range from sitting on governance groups to designing, delivering, and evaluating service change, and education activities. Involvement activities are distinct from participation in research where the individual involved is the subject of the research.

3. Scope

This policy applies to:

- all public partners who undertake involvement activities with Health Innovation Oxford & Thames Valley. The Working Together Partnership also adopts the principles of this policy².
- this includes children, and young people under 18, who take part in involvement activities. Permission from a parent or guardian should be gained before any activities are undertaken.
- virtual and in-person involvement (virtual involvement will be treated as being equivalent to involvement in-person).

This policy does not apply to:

- health and care staff who are asked to provide comment from a professional perspective. Health and care staff may on occasion provide patient or carer lived-experience perspectives (see section 10 for detail).

4. Responsibilities of Health Innovation Oxford & Thames Valley

We will make sure there is a record of agreement with public partners of what is expected, which expenses will be covered, and whether payment for time spent on involvement activities will be offered.

We will make sure that our claims process is as simple as possible, and that payments are made in a timely manner. Whenever possible, we will make payments within six weeks of receiving claims.

We will provide public partners with a named programme, or research lead who is their main contact for:

- making sure that there is a record of agreement of what is expected, which expenses will be covered, and if payments for involvement activities are offered
- providing day-to-day support, a 'first point of contact' for any queries
- Managing the programme's public partner budget

¹ Other organisations may use a range of terms such as patient and public voices [PPV], service user involvement, lay representatives, lay voices, public voice representatives, patient and public involvement [PPI] representatives etc.

² Each organisations individual policies to be referred to as differences in payment rates and other particulars varies.

We will also provide a named contact for payment. This person will send out monthly claims forms and will support timely payment of claims. This person may be the named programme (or research) lead or another designated, named person.

5. Responsibilities of public partners

Public partners should read this policy and raise any questions with their named programme lead, before undertaking any activities. Public partners are also responsible for:

- providing receipts, tickets, or other evidence of spending to send in with claims forms
- submitting claims when requested, ideally each month, or within three months after the activity (claims for expenses or activities more than three months old will be reviewed for eligibility on a case-by-case basis)
- keeping a record of expenses and activities for their own benefit (public partners cannot claim for time spent on this administration or the time taken to submit their claim)
- seeking advice in relation to involvement payments:
 - if in receipt of any form of benefits (see section 7.2) and
 - in relation to income tax, National Insurance, and pension contributions (see section 7.3)

6. Levels of involvement and categories of payment

We have three levels of involvement (Figure 1). These levels relate to the intensity of involvement activities and the payments that can be claimed. We recognise that at times involvement activities do not fit neatly into these categories. The tables below provide a brief outline to what can be claimed for in each category. A more detailed list of examples can be found in Appendix 1.



Figure 1: Levels of Involvement

6.1 Partner: Inform & Consult – no payment can be claimed

For example: attending an all-access public meeting, completing a survey, or receiving a newsletter. Individuals choose to attend or participate, there is no expectation that they will.

Travel expenses	Carer expenses	Involvement activities	Travel time
×	×	×	×

6.2 Partner: Advise – payment of expenses only

For example: attending a workshop or training event. Claims for expenses, such as travel, or carer support, can be made (see section 8).

Travel expenses	Carer expenses	Involvement activities	Travel time
✓	✓	×	×

6.3 Partner: Lead – payment for time spent on involvement activities and expenses

For example: involvement activities with greater time commitment, accountability, or involvement such as the appointment as a member of programme oversight boards, research advisory panels, or co-designing and delivering a large event or programme.

Claims for time spent on involvement activities can be made (see section 7). Expenses can also be claimed (see section 8).

Travel expenses	Carer expenses	Involvement activities	Travel time
✓	✓	✓	×

7. Payment for time spent on involvement activities

We do not employ public partners; they are volunteers of the organisation, even if payments are made. Payment arrangements, and involvement activities, must be agreed between the named programme/research lead and public partners before involvement begins. This will help ensure mutual understanding as to what activities can be claimed for. A record of this agreement should be kept by both the public partner and the organisation.

Payment and activities may need reviewing if circumstances change e.g. if the needs of the programme change, or the public partner no longer feels able to contribute.

Payments can be declined by the public partner, or smaller payments claimed.

7.1 Payment rates

All activities, including preparation and follow-up, can be claimed for at a rate of £20 per hour.

e.g. if a meeting takes two hours and preparation for the meeting one hour, three hours can be claimed [3 x £20 = £60 total claim].

For some involvement activities, a flat rate, rather than an hourly rate will be offered. It will always be made clear at the outset if this is the case.

We do not offer high street or gift vouchers as a method of payment as standard.

7.2 Public partners who receive state benefits

Jobcentre Plus offices may interpret taking part in involvement activities as readiness for work, whether payment is offered or not.

Similarly, His Majesty's Revenue and Customs service (HMRC), or the Department for Work and Pensions, may see involvement payments, or vouchers, as earnings or income.

Public partners should be aware that their entitlement to benefits may be affected. Breach of benefit conditions can result in benefits being stopped.

A template letter, based on one developed by NHS England, explaining the nature of patient and public involvement for Jobcentre Plus and other agencies, can be found in Appendix 2. Should you have any questions about this letter please do speak with your programme lead.

It is the responsibility of the public partner, not the Health Innovation Oxford & Thames Valley, to comply with the conditions of their benefits. They should speak to their benefits advisor or Jobcentre Plus to discuss their circumstances. A confidential helpline, provided by Bedford Citizens Advice can also help with queries. Contact: contractsadmin@bedfordcab.org.uk or 01234 330604. It is strongly recommended that public partners in receipt of benefits contact this helpline, prior to starting involvement activities, to make sure that there are no adverse effects.

We do not offer vouchers as a standard method of payment. Please note, vouchers may be treated as earnings, and viewed by the benefits and tax authorities in the same way as other forms of payment.

7.3 Tax

There is a difference in tax rules for payment made for involvement activities and payment of expenses.

- payment for activities: payment for time spent on involvement activities is taxable and should be declared for tax purposes
- payment of expenses is not taxable

Public partners with questions about tax or National Insurance can contact their local HMRC office [HMRC Helpline 0300 200 3311].

7.4 Health insurance and sick leave

Public partners who receive income from medical insurance e.g. on sick leave (either as an individual or through their employer) should be aware that involvement activity, and especially acceptance of involvement payment, may be a breach of terms and conditions. This could put future payments at risk. If there is any doubt about the potential impact of involvement activity on medical insurance arrangements, public partners are advised to contact their employer and/or insurance provider.

8. Payment of expenses

Public partners involved in *Partner: Advise* and *Partner: Lead* activities can claim for the expenses listed below. Expenses that are not listed in this policy can only be claimed with advance, written agreement between the public partner and the programme lead.

Where a young person or child is involved and it is their parents who have incurred expenses, the parents should make the claim.

Receipts should be supplied whenever possible. If receipts are difficult to obtain (e.g. contactless card payments) copies of bills or computer printouts with the relevant section highlighted, can be used. Payment of expenses is not taxable.

8.1 Travel expenses

Public transport

Whenever possible, public partners should liaise with their programme/research lead to book advance travel. If this is not possible then standard class public transport can be claimed, up to the value of the ticket, which should be submitted. Public partners should book the cheapest fare reasonably available.

Taxis

Taxis fares can only be claimed if agreed in advance with the programme/research lead, and where there is a justification on the grounds of:

- multiple people travelling to the same place
- personal safety, for example late night travel
- disability, impairment, or long-term condition preventing alternative travel arrangements
- efficiency, for example more than one meeting, in different places, on the same day
- if it is the only feasible means of transport.

Receipts must be submitted with the claim.

Private cars, motorcycles, and bicycles

Public partners can use their own vehicle when necessary and can claim for miles travelled. Mileage can be claimed from “home” to “place of meeting”, and the return journey, at the following rates:

Method of transport	Per mile Up to 10,000 business miles in the tax year	Per mile Over 10,000 business miles in the tax year
Cars/vans	45p	25p
Motorcycles	24p	24p
Bicycles	20p	20p
Extra passenger travelling to same meeting	Additional 5p per mile	Additional 5p per mile

The cost of parking, tolls or congestion charges can be claimed if receipts are submitted. Public partners are personally responsible for any excess parking penalties, charges or fines issued to them. No payment can be claimed for time taken to travel.

8.2 Caring expenses

In some circumstances public partners may need to arrange for a carer or support worker to accompany them to a meeting, or to take over their caring responsibilities whilst they are at a meeting.

Claims for reasonable expenses to cover the costs of paying carers or support workers, including travel, accommodation or meal requirements can be made. This should be agreed on a case-by-case basis in advance with the programme/research lead.

The carer or support worker is engaged by the public partner and not by Health Innovation Oxford & Thames Valley. We will pay actual expenditure based on receipts submitted with expense claims. The receipt should provide details of the carer’s registration and/or the organisation providing the care.

8.3 Office supplies

We will try to minimise the need for home office supplies. Public partners can request hard copies of meeting papers etc.

Office expenses cannot be claimed if the public partner is being paid for their time. If this presents any challenges, please speak to your programme lead.

8.4 Meals and accommodation

We will provide refreshments when appropriate. On the rare occasion that a public partner is asked to be at a venue over a mealtime and food is not provided, they can claim as below:

Breakfast: if leaving home before 7.00	Up to a maximum of £5.00
Lunch: if at a meeting away from home for more than four hours and covering 12.00 – 14.00	Up to a maximum of £5.00
Evening meal: if at an event away from home after 17.00	Up to a maximum of £15.00

These rates are the maximum which can be claimed. Alcohol, tobacco, and discretionary service charges cannot be claimed. Receipts must be produced with claims.

9. Claims and payment process

We will pay you directly into your bank account, via a payment claims form. Each month the programme lead, or designated payment lead, will send public partners a claim form to complete. You cannot claim for time spent collating/logging your activity or involvement, or time spent completing the claims form. Further information on how to submit your claim and the payment process can be found in Appendix 3 and a blank claims form in Appendix 4. If you do not have a bank account, please let us know as soon as possible so that we can make alternative arrangements.

10. Health and care staff who contribute their lived experience

This policy does not apply to staff who are asked to be involved to provide their professional perspective.

On occasion, someone employed in health and care may be asked to contribute their lived experience as a patient or carer. Health and care staff who take part in involvement activities during their normal working hours should have their manager's agreement. In this situation, payment for time spent on involvement activities cannot be claimed. If the involvement activity takes place outside normal working hours and the member of staff is providing a patient or carer perspective, then a claim for time, travel or other expenses can be made.

Appendix 1: Examples of involvement activities

This table is offered for **guidance only**. If you have any concerns and queries, please raise it with your programme lead before you commence the activity.

Public partner involvement	Expenses	Involvement activity
Partner: Inform & Consult		
Attendance at open or public meetings or consultations and giving an individual view, no commitment required	×	×
Responding to questionnaires	×	×
Partner: Advise		
Attendance at consultation events by invitation	✓	×
Participation at optional meetings (regardless of what the meeting is trying to achieve) where no, little or occasional commitment is required	✓	×
Evaluating and reviewing documents (unless this is an agreed part of ongoing role)	✓	×
Partner: Lead		
Helping to write documents (public summaries, articles for a newsletter, patient information leaflets etc)	✓	✓
Representation and participation at designated meetings (regardless of what the meeting is trying to achieve) where in-depth commitment is required; for example, public partners sitting on strategy boards	✓	✓
Leading focus groups, workshops, or conferences etc	✓	✓
Chairing designated groups or meetings	✓	✓
Staff recruitment and interview panel membership	✓	✓
Giving presentations	✓	✓
Staff training (where the public partner co-designs and delivers the training)	✓	✓
Monitoring or evaluating services or mystery shopping	✓	✓

Appendix 2: Template letter for Jobcentre Plus and other agencies

Community Involvement & Workforce Innovation Team
Oxford Academic Health Science Network
Magdalen Centre, Robert Robinson Avenue
Oxford Science Park
OX4 4GA

E: community.involvement@healthinnovationoxford.org

Dear Case Advisor,

Re: Service User Involvement

I am writing to you to advise you about the involvement activity with Health Innovation Oxford & Thames Valley to ensure that there is clarity about peoples' involvement with us.

Health Innovation Oxford & Thames Valley is hosted by Oxford University Hospitals NHS Foundation Trust, we help the NHS to make service improvements and adopt innovation. To do this effectively we ask for feedback and information from patients and the public about their experiences of health care. We encourage patient and public involvement as it allows us to use their insight to help improve patient outcomes.

We recruit people for involvement so that they can share their personal experiences. Recruitment for involvement should not be confused with recruitment for employment. We involve people to be our 'public partners', they are not employees of Health Innovation Oxford & Thames Valley.

Government policy recommends that patients and public can be paid to attend meetings and paid their out-of-pocket expenses. In line with NHS England and NHS Improvement policy, Health Innovation Oxford & Thames Valley aims to ensure that patients and the public who are in receipt of state benefits are only paid according to individual benefit rules on earning limits and disregards. Please note the DWP legislation treats reimbursed expenses for service user involvement as ignored. This is set out in Advice for Decision Makers V4 para 4119-20.

Patient and public involvement is arranged carefully with staff support, so that people who are unable to work can participate and talk about their experiences of using services. We are particularly concerned that involvement in any of our meetings is not mistaken as representing the capacity for work.

We understand that people may decide to discontinue involvement at any time for the purpose of looking for or finding a job. We support any activity that might assist their return to work.

Should you have any queries, please do not hesitate to contact me on the email address listed above.

Yours faithfully,



Dr Siân Rees

Director of Community Involvement and Workforce Innovation, Health Innovation Oxford & Thames Valley

Appendix 3: How do you claim and the payment process

1. On the 1st day of each month (or the next working day, should the 1st fall at weekend) your designated programme/payment lead will email you a claims form to complete. This will be for activities completed in, and expenses you have paid, for the **previous** month. This means you will be paid in arrears.
2. You will be asked to fill in your personal details (address, email, bank account details) and state how many hours you have spent on activities and any expenses. You must also state which programme the activities relate to (e.g. Secure Data Environment project), the date and detail of the activities (e.g. two-hour committee meeting).
3. You should return your completed claims form to your designated payment/programme lead within two weeks. Claims for expenses or activities more than three months old will be reviewed for eligibility on a case-by-case basis.
4. If you are submitting a claims form for expenses, you must also provide receipts or tickets. Where receipts are difficult to obtain e.g. contactless card payments or calls made on mobile phones; copies of bills or computer printouts with the relevant section highlighted can be accepted.
5. If you have not undertaken any activities or have no expenses to claim that month, you do not need to complete a form. However, we advise that you reply to your programme/payment lead to let them know.
6. Once you have submitted your form, your programme/payment lead contact will check the form and get it approved by the relevant Health Innovation Oxford & Thames Valley Director. It will then be submitted to Oxford University Hospitals NHS Foundation Trust (OUH) for payment. OUH provides finance services for the Health Innovation Oxford & Thames Valley.
7. Payment should usually reach your account within six weeks of you submitting your payment form. If there are any queries, it may take longer.

Appendix 4: Involvement activities claim form

This form should be provided to you by your programme/payment lead as a separate document.

Health Innovation Oxford & Thames Valley Involvement Activities Claims Form

If you have any problems with filling-in this form, or have any questions, then please contact the person who is organising your involvement activities. Please return this form to them.

Your contact details	
Full name:	
Email:	Contact number:
Postal address:	

Your bank account details:	
Bank name:	
Account name:	
Account number:	Sort code:

Your involvement activity/activities						
Description of activity e.g. name of meeting or reading for meeting <i>(Please number and attach all receipts - petrol receipts are not necessary)</i>	Day & month of activity	Number of hours claimed	Receipt Number	Number of miles	Amount claimed per mile	Amount Claimed £
Total Amount Claimed £						
Rate of pay is £20 per hour and 45p per mile for a car as per the Health Innovation Oxford & Thames Valley Payment Policy						

Signature of claimant:..... **Date:** /..... /.....

Health Innovation Oxford & Thames Valley hosted by Oxford University Hospitals NHS Trust aims to pay all claims within six weeks of receiving an authorised form

For office use only

Name and email of Health Innovation Oxford staff organising activity:
Unique Supplier ID Code:

Authorised Budget Holder Signature:

Signed: **Print Name:**

Programme:

Date: / /

For Finance use (totals by codes)			
	Cost Centre	Sub section of cost centre	Amount £
Total Claimed £			