**PPI payment process**

Please see the separate [PPI payment policy](https://www.phc.ox.ac.uk/ppi/resources?ref=image) for full information including details of rates of payment and expenses.

**Paying public contributors for their time**

It is best practice to pay any patients or members of the public who take part in PPI activities for their time. This might be taking part in a discussion group, reviewing documents or numerous other tasks, and could be done online or in person. The £5 fee per meeting recommended by NIHR to cover home-working can be included in this payment (it does not need to be claimed separately as an expense).

It is important to agree in advance how much the contributor will be paid and whether this will be by bank transfer or vouchers – if possible, ask your contributors which they would prefer.

If purchasing vouchers, please see the finance team’s guide: <https://www.phc.ox.ac.uk/intranet/finance/finance-faqs>

If you are paying someone by bank transfer, you will need to complete the [payment request form](https://finance.admin.ox.ac.uk/prfs-and-recurring-invoices) (PRF). The form may be difficult for contributors to fill in if they are not familiar with it, or don’t have access to Microsoft Excel, so please consider offering to do it for them.

Person to contact in case of query – please include your details in this field.

Payments to individuals – please select ‘Other’ from the drop-down menu. It is ***not*** necessary to include National Insurance number.

Reason for payment – briefly say what the PPI activity was with the date it took place eg joining a PPI discussion group on dd/mm/yyyy.

Authorisation

Request prepared by – please sign your name (electronically is fine) or ask the contributor to do so if they completed the form, and add the date.

Approved by – this will either be for your budget holder, or if you are paying the contributor with funds from the Department PPI fund, please leave blank for the PPI Manager to complete.

Budget/cost coding

Most payments will come from a specific project budget – please complete all fields in this section.

VAT amount – 0.

Code – 1.

Project – first part of budget code (for example BZR01234)

Task – second part of budget code (for example BZ01.01)

Expenditure type – Other costs.

Expenditure org – Primary Care Health Sciences.

If you are receiving PPI funding from the Department PPI fund, please complete all fields in this section except for Project and Task, then email to the PPI Manager for approval.

**Paying contributors’ expenses claims**

If your contributors have any expenses to claim, such as travel or caring costs, you will need to use the [external expenses claim form](https://finance.admin.ox.ac.uk/how-to-claim-expenses-claimants-external-to-the-university). As with the PRF, please consider offering to do this on behalf of your contributors.

It is important to agree these costs in advance – please see the separate PPI payment policy for more information. The contributor will need to supply receipts (these can be original copies or scans/photos). If they are claiming for care that was provided, the person who gave the care will need to provide an invoice or receipt – if this is from an organisation or agency, it should be on headed paper. If the care was provided by a friend or family member, the receipt should include:

Name of the individual or agency providing the care.

The date and time (start and finish) the care was provided.

Reason for the care eg providing care while contributor attended a PPI meeting.

The amount.

Signature.

The Department will not reimburse the carer directly – they can only reimburse the contributor through the expenses claim.

Please complete the form as fully as possible, with all individual journeys and the purpose of each eg to attend a PPI meeting.

Caring costs should be listed under ‘Subsistence/other expenses’.

Budget/cost coding

Please complete as per the instructions above.

Declaration

The contributor needs to sign and date the form. If this is done electronically, they must include the declaration below in the body of their email when they send the claim form:

‘I can confirm that the claim for reimbursement of £xx is in respect of bona fide business expenses, incurred wholly, exclusively and necessarily on behalf of the University. It relates to costs already incurred relating to University business undertaken on dd/mm/yyyy.’

Alternatively, they can print and sign the form and either scan and return by email, or post the hard copy.

All completed, signed PRFs and expenses claims should be sent to [finance@phc.ox.ac.uk](mailto:finance@phc.ox.ac.uk)