

Nuffield Department of Primary Care Health Sciences

Patient and public involvement (PPI) payment policy



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1. Introduction

The Nuffield Department of Primary Care Health Sciences ('the Department') is committed to involving patients, carers and the public as active partners in its work, termed patient and public involvement (PPI). To ensure that there is a consistent approach to payment, and that our public contributors are treated equally, this document sets out the Department policy for payment of expenses, and payment for time spent undertaking involvement activities. This policy is based on [payment guidance from the National Institute for Health and Care Research \(NIHR\)](#).

2. Terminology

'Public contributor'¹ refers to patients, carers or members of the public who are involved in activities with the Department.

Involvement activities can range from sitting on governance groups to the design, delivery or evaluation of service change, research, or education. Involvement activities are distinct from participation in research where the individual involved is the subject of the research.

'Named staff member' refers to the person who initiated the involvement work and is the contact person to that particular involvement activity. The named staff member is likely to either be the Department PPI manager or a researcher.

3. Scope

This policy applies to:

- all public contributors who undertake involvement activities with the Department.
- children, and young people under 18, who take part in involvement activities. For young people under 16, permission from a parent or guardian should be gained before any activities are undertaken.
- virtual and in-person involvement

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 7.1 for detail).

4. Responsibilities of the Department named staff member

The Department will provide public contributors with a named staff member who will:

- ensure that there is a record of agreement of what is expected, which expenses will be covered, and if payments for involvement activities are offered, before the involvement begins
- provide day-to-day support, a 'first point of contact' for any queries

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

- send out claims forms after each activity and support timely payment of claims (whenever possible, payments are made within four weeks of receiving claims)
- explain to public contributors what information is needed to complete the claim
- offer support to public contributors to complete claims, for example filling out forms on their behalf
- explain that the University keeps this information for 7 years
- ensure public contributors are aware that welfare benefits may be affected if payment for involvement activities is made, and that it is the public contributor's responsibility to seek [advice](#) about this

It is important to keep in mind that claiming for payments may be a low priority for public contributors and completing unfamiliar forms may be a barrier. They may also feel uncomfortable asking for help. The named point of contact should make every effort to assist public contributors in claiming for payment and expenses, as detailed above.

5. Responsibilities of public contributors

Public contributors should read this policy and raise any questions with their named staff member before undertaking any activities. Public contributors are also responsible for:

- providing receipts, tickets, or other evidence of spending to send in with claims forms
- submitting claims when requested and within two months of the activity (claims for expenses or activities more than two 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 contributors cannot claim for time spent on this administration or the time taken to submit their claim)
- seeking advice in relation to involvement payments:
 - in relation to income tax, National Insurance, and pension contributions (see section 7.3).
 - if in receipt of any form of benefits (see section 7.4 and 7.5)

6. Activities for which payment is and is not provided

For the majority of PPI activities, The Department recommends that payment is offered wherever possible. However, there are some activities for which payment would not be provided. These are outlined below.

Payment for time spent on involvement activities [is provided](#)

- Representation and participation at designated meetings where in-depth commitment is required; for example, public contributors sitting on strategy boards
- Helping to write documents (articles for a newsletter, patient information leaflets, etc)
- Attending, chairing or leading focus groups, workshops, or conferences

- Attendance at consultation events by invitation
- Evaluating and reviewing documents
- Being part of staff recruitment and interview panel membership
- Giving presentations
- Staff training (where the public contributor co-designs and/or delivers the training)
- Supporting and / or mentoring other PPI contributors

No payment is provided

- Attendance at open or public meetings or consultations and giving an individual view, no commitment required
- Attendance at optional training events or webinars, no commitment required
- Responding to short questionnaires

7. Payment for time spent on involvement activities

Involvement activities and respective payments must be agreed between the named staff member and public contributor 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 contributor and the organisation.

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

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

7.1 Eligibility

Public contributors who do not have a full-time public sector salary are eligible to receive a payment for their involvement. For public contributors who do work full time in the public sector, the Department is able to reimburse for time if their job is unrelated to the task(s) they do for us, and they do them in their free time.

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, carer or member of the public. 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.

7.2 Payment rates

All activities, including preparation and follow-up, can be claimed for **at a rate of £25 per hour**.

e.g. if a meeting takes two hours and preparation for the meeting one hour, three hours can be claimed [3 x £25 = £75 total claim].

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

7.3 What is reimbursed?

Reimbursement is offered for both virtual and in-person involvement activities.

Travel expenses are offered *only* for in-person activities and need to be agreed in advance by the public contributor and the named staff member. Please note that travel time *is not* reimbursed.

If public contributors to claim expenses for childcare or carer costs to enable them to take part in involvement activities, these need to be agreed in advance with the named staff member. Every effort will be made to accommodate requests wherever possible, budget allowing.

NIHR offers £5 per virtual meeting to cover costs of telephone calls, paper, printing ink and paper, internet connection and other home sundries. Budget allowing, the Department will endeavour to offer the £5 standing allowance per virtual meeting, in line with NIHR guidelines.

7.4 Tax

Offering payment for our public contributors' time recognises the contribution they make to our work. However, it does not mean they have a contract of employment with us. It is the responsibility of the public contributor, not the Department, for income tax, National Insurance and pension contributions on any payments received for their time.

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

7.5 Public contributors who receive state benefits or have a pension

Public contributors can always accept reimbursement of expenses, but receipt of payment for time is a very complex area if a public contributor is in receipt of state benefits of any kind and/or a state pension.

The Department urges public contributors to seek specialist advice before agreeing to accept payment and also speak to their benefits advisor or Jobcentre Plus, if applicable, to discuss their individual circumstances. It is the responsibility of the public contributor, not the Department, to comply with the conditions of their benefits. Accepting payment for time may affect entitlement to benefits and this can result in benefits being stopped.

Jobcentre Plus officers may interpret taking part in involvement activities as readiness for work, whether payment is offered or not. To avoid misinterpretations, the Department will provide public contributors with a letter that they can show the Jobcentre. This explains that that service user involvement is about consultation with a person who has personal experience of using health and social care services because of their health condition or other circumstances, and as such cannot be confused with work or capacity for work.

A confidential helpline, provided by *Bedford Citizens Advice* can also help with queries. Contact: contractsadmin@bedfordcab.org.uk or telephone: 01234 330604.

For NIHR-funded research projects, there is a confidential free service, also run by Citizens Advice Bedford. To contact the service please email (preferred): ced@nihr.ac.uk or telephone: 020 8843 7117. Public contributors will need to know which part of the NIHR the involvement activity is with (for example, BRC, CRF, ARC, CRN, SPCR).

For more information, see:

<https://www.nihr.ac.uk/documents/payment-guidance-for-members-of-the-public-considering-involvement-in-research/27372>

7.6 Health insurance and sick leave

Public contributors 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 contributors are advised to contact their employer and/or insurance provider. The Department will be able to provide a letter explaining the nature of involvement, as outlined above in section 7.5.

8. Payment of expenses

Subsistence costs are for time spent away from home and the costs that need to be met because of this, for example, paying for meals, travel and accommodation.

Expenses that are not listed in this policy can only be claimed with advance, written agreement between the public contributor and the named staff member.

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 contributors should liaise with their named staff member to book advance travel. If this is not possible, standard class public transport can be claimed, up to the value of the ticket, which should be submitted. Public contributors should book the cheapest fare reasonably available.

Taxis

Taxis fares can only be claimed if agreed in advance with the named staff member, 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 contributors 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 contributors 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 contributors 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 named staff member.

The carer or support worker is engaged by the public contributor and not by the Department. We will reimburse 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. If this is not available (e.g. when the carer is privately

employed), the carer's name, address, email, telephone and NI number should be included on the receipt.

8.3 Meals and accommodation

Meals

For in person events, the Department will endeavour to provide meals and refreshments when appropriate. Our public contributors are able to claim for subsistence when meal times fall within the journey to/ from our event. The claim allowances are:

Breakfast: if leaving home before 7:00	Up to a maximum of £10
Lunch: if at a meeting away from home for more than four hours and covering 12:00 – 14:00	Up to a maximum of £10
Evening meal: if at an event away from home after 17:00	Up to a maximum of £25

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

Accommodation

Appropriate and safe overnight accommodation should be used, ensuring value for money is achieved. If public contributors require accommodation to join an involvement activity, they should discuss this in advance with their named staff member, who may be able to book accommodation in line with the University of Oxford preferred suppliers on their behalf. Accommodation costs in Oxford are capped at £150 per night, to include breakfast.

Date and time of arrival and departure will be discussed with public contributors in advance and wherever possible a refundable booking will be made in case of last-minute cancellations due to unforeseen circumstances.

Overnight accommodation with friends or family

It is not possible to claim for overnight accommodation costs for staying with friends or family. In addition, public contributors may not claim for any 'payment in kind' they give to the friend or family member (HMRC views the monetary value of this as a personal benefit received by the host). This would include examples such as:

- the cost of meals eaten within or outside the residence
- 'thank you' gifts of any value

9. Claims process

Receiving payment for time is based on three steps:

1. Agreement on what is expected and how much public contributors will be paid (based on a rate of £25/h - see section 7.2);
2. Agreement of which expenses will be covered and whether some of these will be made in advance by the Department (e.g. train tickets and accommodation);
3. Filling in a form for payment and a separate form for expenses, which will be given to public contributors by their named staff member after each activity, signing and returning it to them, with original receipts for expenses if there are any. Alternatively, public contributors may be given vouchers if this has been agreed in advance.

Once public contributors have submitted their form, their named staff person will check the form(s) and get it approved by the relevant line manager, and then submit for payment.

Public contributors' personal details will be seen by the staff members involved with claims, as well as budget holders, and financial administrators. All forms will be held securely on University servers. Public contributors' details will not be used for any other purpose than to make payment, and a new form will need to be completed each time a public contributor makes a claim.

Public contributors will receive reimbursement by bank transfer (BACS) or high street vouchers – this will be agreed in advance.

10. Who to contact

Different pieces of involvement work will be initiated and paid by different people/ departments. The contact person in each case may be different and should always be given. In this document, this person has been referred to as the named staff member. If there is not a named contact given, public contributors should check with the person who approached them in the first place.

General queries about this policy can be addressed to the PPI Manager at the Department (polly.kerr@phc.ox.ac.uk).

Acknowledgements

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It has been agreed by the Oxford PPI staff group. This group meets six times a year and includes PPI leads from the Medical Sciences Division and local NIHR organisations.

This final version, specific to the Nuffield Department of Primary Care Health Sciences, was adapted by Polly Kerr, and has been reviewed and approved by the Department's finance team.