

Health and Care Research Wales Support and Delivery Centre

Public involvement guidance on payment for expenses and offer of payment for time for individuals registered with the involvement community

This guidance was written by the Public Involvement and Engagement team and reviewed by members of the public involvement community. This version 12; dated October 2024 replaces all previous versions of this policy. Thank you to our public reviewers.

Contents

Introduction	3
1. Who is this policy for?	3
2. Expenses.....	3
2.1 How will we cover your expenses?	3
2.2 What expenses are covered?	4
3. Offer of payment for time.....	7
3.1 Rates	7
3.2 If you are receiving state benefits:	7
4. Responsibility for tax payments.....	8
5. Submitting your claim for fees and expenses following their preapproval	8
6. Contact details.....	9

Introduction

The Health and Care Research Wales Support and Delivery Centre Public Involvement (PI) team is committed to aligning its practice with the UK Standards for Public Involvement, valuing, and enabling the involvement of the public in the Health and Care Research Wales infrastructure and beyond and discharging its duty to ensure appropriate use of public funds. Direct payment or the reimbursement of expenses and payment for time are some ways in which the PI team ensure that members of the public have an equal opportunity to get involved.

This document provides guidance to individuals registered with the involvement community where financial support is being provided by the Public Involvement team, outlining specific rates for expenses and payment for time. It has been developed with reference to NIHR's payment guidance for members of the public considering involvement in research: <https://www.nihr.ac.uk/documents/payment-guidance-for-researchers-and-professionals/27392>. This document also provides information on what to expect before, during and after your involvement, and the processes for claiming payment for time and expenses during that period.

The offer of a payment (sometimes referred to as an honorarium) is not considered a contract of employment but is a means of recognising contributions made by individuals registered with the involvement community. The administration of reimbursement and payment adheres to Powys Teaching Health Board procedures, as host of the Support and Delivery Centre.

1. Who is this policy for?

Individuals registered with the involvement community who are involved in, or contributing to, a specific event, training course, meeting, activity, or piece of work aligned with the Health and Care Research Wales infrastructure.

This policy does not apply to people who are engaged for employment.

2. Expenses

2.1 How will we cover your expenses?

We have a pre-approval process which ensures that any expenses have been agreed before the involvement activity and before any costs are incurred by the individual registered with the involvement community.

Wherever possible, we will book and pay for expenses in advance. This ensures that the individuals involved are not out of pocket and enables us to obtain good value for money with public funds. Individuals involved who do not have a bank or building society account must ask to have all expenses booked and paid for directly by the Public Involvement team.

We will pay expenses when:

- the individual registered with the involvement community has completed a pre-approval form
- the potential expenses have been approved and agreed in writing
- the individual registered with the involvement community can provide evidence of expenses incurred in the form of receipts (following the activity)
- the team considers that the expenses are reasonable, appropriate, and associated with the activity

2.2 What expenses are covered?

Travel

Train

The Public Involvement team will book and pay for travel expenses in advance of any agreed involvement activity.

In certain situations, it may not be possible for the team to do this in advance of an activity. **Providing the expected travel expenses have been preapproved as part of the pre-approval of expenses process**, the following expenses may be reimbursed:

- Standard class rail fares (not first class), cheaper day or other reduced rail fares where possible, **supported by receipts**

In certain situations, a member may be in possession of a rail travel card which allows them to purchase tickets at a discounted rate. In these circumstances, please inform the team at the pre-approval stage

Car

We encourage the use of public transport where possible, but where necessary will reimburse mileage using a tariff for car users which is in line with HM Revenue and Customs (HMRC) policy (<https://www.gov.uk/government/publications/rates-and-allowances-travel-mileage-and-fuel-allowances>).

Type of vehicle

Cars and vans 45 pence per mile

Motorcycles 24 pence per mile

Bikes 20 pence per mile

For the shortest practical route calculated on AA route planner.

An additional 5 pence per mile will be paid for each additional passenger carried if that passenger is also involved in the activity. If a carer or personal assistant is travelling with the involved individual in the same car, no passenger mileage is payable for the carer / personal assistant.

If the involved individual extends or deviates their journey to incorporate an activity not related to the involvement activity, this excess mileage cannot be claimed. However, if a different route is taken on the day due to circumstances out of the individual's control, this must be made clear on the claim form.

Other travel tolls and parking

Taxi, bus, and underground fares will be reimbursed as well as the incidental expenses of a journey, including tolls and parking, when circumstances justify the expenditure incurred and they are at the cheapest rate available and supported by receipts. Parking or speeding fines do not qualify for reimbursement.

Accommodation

The team will always endeavour to book this in advance. Please contact us to request this **at least two weeks prior to the activity**. As the team have encountered difficulties securing accommodation during peak times it is helpful if you give as much prior notice as possible. In the exceptional circumstance where the team have not been able to book and pay for accommodation in advance of the activity, **accommodation can be booked by the involved individual as long as the cost has first been approved by the team.**

Accommodation costs can be reimbursed as follows:

- For outside of London, the cheapest available accommodation that is sufficient for the **involved individual's** needs, not usually exceeding £100 per person, per night (including breakfast and VAT). Any accommodation exceeding £100 must be pre-approved by Public Involvement and Engagement team.
- For London, the cheapest available accommodation that is sufficient for the **involved individual's** needs, not usually exceeding £150 per person, per night, (including breakfast and VAT). Any accommodation exceeding this £150 amount must be pre-approved by the Public Involvement and Engagement team.
- If you choose to stay with friends or relatives, we are not able to cover any of these costs.

Subsistence

Meals, refreshments, and snacks are generally provided at an event. However, meal costs can be covered when an involved **individual** is absent from home and more than five hours travel from their home by the shortest practical route.

Costs for meals, snacks and **non-alcoholic beverages** will be reimbursed **providing the expected expenses have been pre-approved as part of their preapproval of expenses process:**

- Breakfast up to £5.00 (only if five hours away from home, including the breakfast period of 07:00 to 09:00)

- Lunch up to £5.00 (only if five hours away from home, including the lunchtime period of 12:00 to 14:00)
- Evening meal up to £20.00 (only if ten hours away from home and returning home after 19:00)

The team has a duty to ensure appropriate use of public money and will presume the right to question any excess journey time. If the involved **individual** chooses to take a longer route or travelling method, then the team cannot pay for meals if the journey is extended past the journey time that is expected. The team will not reimburse meals taken after 21:00 unless they deem it absolutely necessary for involvement in the activity.

Alternative carer or childcare costs

If the **involved individual** is usually a carer or supports someone, getting involved may mean they would be separated from someone who normally depends on them to be there. The team can cover the cost of providing necessary alternative care whilst they are getting involved in pre-approved activities. Specific details may be required to ensure the team are able to support this fully. For example, to verify if someone is a caregiver, they can submit either of the following:

- a Carer's ID Card,
 - a letter showing they receive Carer's Allowance or
 - a council tax reduction because of caregiving duties, or
 - proof of residing with someone who receives home care or respite.
- Additionally, we may need the caregiver's bank details to arrange payment.

If individuals pay for home care or respite services and receive invoices, they must provide copies for review. These invoices must come from an approved carer or a registered care company. We only accept non-formal invoices in exceptional circumstances. If formal invoices cannot be provided, carers' costs will be covered at the average daily rate.

We are able to reimburse carer or childcare costs if you are unable to pay directly. To request this, individuals registered with the involvement community should contact the team at least two weeks prior to the activity to go through the preapproval process.

Accompanying carer/personal assistant

If it is necessary for an informal, unpaid carer/personal assistant to accompany the individual who is participating in pre-approved involvement activities (for example if the individual is disabled), the carer/personal assistant's expenses may also be reimbursed. Specific details may be required to ensure we are able to support fully.

Administration of these costs follows the same procedure as for individuals registered with the involvement community.

Other costs

To ensure involvement is accessible to all, the team will consider covering reasonable costs in addition to those shown above, which may include interpreters, signers for deaf people etc. This should be agreed prior to the involvement activity/meeting and will follow the same procedures as above.

Reimbursement for individuals registered with the involvement community with disabilities

Individuals registered with the involvement community with disabilities may claim for reasonable extra accommodation/travel/subsistence facilities to support them in preapproved involvement activities (for example the need for help from a porter or hire of a hoist or other equipment to support accommodation). **The team must be asked to agree these potential costs in writing as part of the pre-approval of expenses process** before the individual undertakes an involvement activity.

3. Offer of payment for time

3.1 Rates

From April 2019 opportunities advertised by Health and Care Research Wales will be categorised to reflect the time commitment, experience, knowledge, and support required. More information on the categories can be found on our website ([https://healthandcareresearchwales.org/sites/default/files/2020-10/Three categories of involvement A4 eng 0.pdf](https://healthandcareresearchwales.org/sites/default/files/2020-10/Three%20categories%20of%20involvement%20A4%20eng%200.pdf)). Some categories of involvement will involve the team offering a payment for time, expertise, and skills for pre-approved involvement activities.

Adverts will always make it clear what payments, if any, will be offered. Payment for time is not offered for training activities or attendance at conferences.

The rate of payment that may be offered is:

- Up to £25 for each hour of public involvement activity which could include stipulated preparation time, attendance at meetings and participation in online or in-person meetings.
- Payments for involvement in the review of funding applications range from £150.00 to £350.00 per day, depending on the specific involvement.

3.2 If you are receiving state benefits:

We are currently in the process of changing the service which provides benefits advice and guidance. In the interim please contact the team with any questions: Email research-involvement@wales.nhs.uk

4. Responsibility for tax payments

The payment you will receive may be considered taxable income. It is your responsibility to ensure that all measures and declarations required are in place on receipt of this income, this includes any Income Tax and National Insurance Contributions which you may need to pay. For avoidance of doubt, the income received is the complete amount, inclusive of any additional amount required for taxation purposes to which Health and Care Research Wales Public Involvement team accepts no responsibility for. Further advice regarding taxation can be obtained from HMRC:

- <https://www.gov.uk/hmrcinternal-manuals/employment-income-manual/eim71105>

5. Submitting your claim for fees and expenses following their preapproval

For your first claim we will ask you to complete a bank details form (BACS) and return it to us by email. Please contact us if this is an issue.

The next step is to complete the claim forms which will be emailed to you.

Attach all your relevant receipts by either scanning or digitally photographing them.

Email to: Research-involvement@wales.nhs.uk

Claim forms should be submitted as soon as possible and preferably within 4 weeks of the event or activity which the claim relates to.

Claim forms submitted more than 8 weeks following the event or activity which the claim relates to will not be authorised for payment.

Payment for time and expenses will be authorised once they have been checked against the expected costs as part of the pre-approval of costs process. Payment of the claim is then managed by the NHS Wales Shared Services Partnership on behalf of Powys Teaching Health Board.

Payment for time and fees will be reimbursed through the NHS Wales Shared Services Partnership by BACS within 6 weeks of receipt of the submitted claim form. Remittance information will be sent to the claimant by email. BACS (Originally an acronym for Bankers' Automated Clearing Services) is a United Kingdom scheme for the electronic processing of financial transactions. BACS payments take three working days to clear. They are entered into the system on the first day, processed on the second day, and cleared on the third day.

The team has a duty to ensure public funds are used appropriately, and will not authorise payment of:

- any claims which are not in line with these guidelines
- any claims without valid receipts
- any claims without valid invoices from approved carers
- any claims for involvement activities not attended / undertaken

6. Contact details

For further help and assistance please contact the Public Involvement team at:

Heath and Care Research Wales Support and Delivery Centre
Castlebridge 5
5-19 Cowbridge Road East
Cardiff
CF11 9AB

Telephone: 02920 230457

Email: research-involvement@wales.nhs.uk