NHS
Devon
Clinical Commissioning Group

PUBLIC AND PATIENT REPRESENTATIVES:
EXPENSES PAYMENTS POLICY

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Document Change History:		
Version	**Date**	**Comments (i.e. reviewed/amended/approved)**
1	25/6/19	This policy replaces the NHS Northern, Eastern and Western Devon CCG and South Devon and Torbay CCG Volunteer Expenses Policy. This policy has been developed by combining the two existing policies, having gone through extensive patient and public involvement. The policy utilises the framework of NHS England's Working with our Patient and Public Voice (PPV) Partners – Reimbursing expenses and paying involvement payments which has undergone an extensive consultation process.

Equality and Health Inequalities Statement

Promoting equality and addressing health inequalities are at the heart of NHS Devon CCGs values. Throughout the development of the policies and processes cited in this document, we have:

- had due regard to the need to eliminate discrimination, harassment and victimisation, to advance equality of opportunity, and to foster good relations between people who share a relevant protected characteristic (as cited under the Equality Act 2010) and those who do not share it; and
- had regard to the need to reduce inequalities between patients in access to, and outcomes from, healthcare services and to ensure services are provided in an integrated way where this might reduce health inequalities.

This information can be made available in alternative formats, such as easy read or large print, and may be available in alternative languages, upon request.

Please visit NHS Devon CCG website , call 01392 674801 or email D-CCGCorporateServices@nhs.net stating that this document is owned by the Communication and Engagement Team, NHS Devon CCG

Contents

1 Introduction

NHS Devon CCG is committed to involving Public and Patient Representatives (PPR) - 'people who are willing to share their perspective and experience with NHS Devon CCG to inform health services in a range of different ways' – in its work.

PPR include patients, service users, carers, families and other members of the public. PPRs may also be referred to as people participating in 'service user involvement', 'lay representatives', 'lay voices', 'virtual voice representatives'.

This policy sets out how NHS Devon CCG supports PPRs to be involved in our work through reimbursing expenses and, in certain circumstances, offering involvement payments and supports our ambition to embed participation within the way we do business and sets out the ways in which NHS Devon CCG meets its legal duty to involve the public in commissioning.

NHS Devon CCG aims to ensure that PPRs are not out of pocket when they support our work and this Policy sets out when and what financial support is available.

2 Scope

This Policy applies throughout NHS Devon CCG, i.e. to all teams across all our business functions. It does not apply to any other organisation.

The Policy applies to individual PPRs, that is, patients, carers and members of the public who help NHS Devon CCG with our work. It covers patients, carers and members of the public who are resident in England, and those who are resident in Wales or Scotland and registered with a GP in England and / or receiving specialised treatment in England.

This policy does not apply to our work with patient and public organisations (such as charities or voluntary and community organisations). It is recognised that working with charities, patient organisations and the voluntary and community sector also brings valuable insight and input to our work. Neither does it apply to people working with NHS Devon CCG who are not PPRs, for example expert advisers such as ethicists, clinicians, scientific advisors, contractors or people working in other consultancy roles.

PPRs are not employees, workers or agents of NHS Devon CCG.

3 Purpose

By “expenses payment” we mean reimbursing the costs that are incurred by PPRs whilst being involved in activities for NHS Devon CCG. This includes making arrangements to directly cover costs which would otherwise be incurred, for example pre-booking train tickets on behalf of a PPR, and reimbursing expenses incurred by a PPRs themselves.

Out of pocket expenses which should be covered include (but are not limited to) travel, accommodation, subsistence and carer support where necessary. Further guidance can be found in appendix 1.

4 Principles

With regards to reimbursing expenses when working with PPRs we will:

- Seek to remove barriers to participation
- Be open and transparent about whether expenses will be reimbursed
- Reimburse out of pocket expenses in line with this Policy
- Provide a named NHS Devon CCG ‘Lead Contact’ for each event, project or meeting who PPRs can contact and liaise with about their expenses
- Supporting bespoke arrangements to support people’s involvement. These will be agreed in advance with the NHS Devon CCGs Lead Contact
- Aim to reimburse expenses in a timely manner, in line with good practice
- Recognise and show our appreciation for the contribution that PPRs make, including reimbursing expenses and listening to their views, saying ‘thank you’ and feeding back on the impact of their participation
- Work in partnership with individual PPRs to ensure that we cover expenses in a way which is fair and feasible and being mindful of offering best value when spending public funds

Please refer to the NHS Devon CCG website for providing information in alternative languages and formats, and professional communication support to support PPRs, as appropriate.

5 CCG responsibilities

The NHS Devon CCG **delegated budget holder** is responsible for authorisation of all PPR expense claimed to be made against that delegated budget.

The nominated NHS Devon CCG **Lead Contact** is responsible for providing day-to-day support for PPRs , including point of contact for any queries.

The Lead Contact is also responsible for ensuring the processing of expenses in a timely manner, in line with this Policy.

6 Financial support for Public and Patient Representatives

NHS Devon CCG has defined the different participation opportunities we offer, and different ways in which we work with PPRs.

The following sets out where claims for expenses may and may not be claimed or reimbursed (further information on the details of any claim can be found in Appendix 1):

Activity	Payment
Attendance at CCG Public meeting	No
Attendance at CCG Road show	No
Attendance at CCG Exhibition /information drop in session	No
Completion of online/paper surveys or polls	No
Attendance at Governing Body (as a member of the audience)	No
Attendance at Meetings/Events hosted by other organisations	No
Activity	**Payment**
Participation in Governing Body – when directly invited by CCG	Yes
Participation in Audit Committee - when directly invited by CCG	Yes
Participation in Primary Care Commissioning Committee - when directly invited by CCG	Yes
Participation in Renumeration Committee - when directly invited by CCG	Yes
Participation in Finance Committee - when directly invited by CCG	Yes
Participation in Quality Committee - when directly invited by CCG	Yes
Attendance at the Public Engagement Panel	Yes
Patient Participation Group forum or network meeting hosted by the CCG	Yes
Participation at other CCG meetings – when directly invited by CCG	Yes
Participation in stakeholder events – when directly invited by CCG	Yes
Participation in seminars or workshop – when directly invited by CCG	Yes
Participation in other CCG Panels (e.g. QEIA/Mental Health) – when directly invited by CCG	Yes
Other voluntary activity (pre-agreed with the CCG)	Yes
Patient Experience interviews	Yes
Participation in a focus group	Yes
Involvement in a Task and Finish Group	Yes
Mystery Shopper (pre-agreed with the CCG)	Yes
Active involvement in procurement e.g. evaluating bids	Yes
Invited to present, chair or facilitate at a CCG run event	Yes
Involvement in staff training or recruitment	Yes

Whilst this list is not exhaustive and for the avoidance of doubt, expenses claimed for PPR attendance events not on the list above must be discussed and agreed with the Lead contact prior to any claim being made.

7 Potential risks / financial implications of involvement

7.1 Supporting people in receipt of state benefits

NHS Devon CCG actively seeks a diverse and inclusive approach to involvement. We recognise that many of our PPRs have ongoing health conditions and / or disabilities and may be in receipt of state benefits.

NHS Devon CCG seeks to ensure that being in receipt of state benefits does not constitute a barrier to involvement.

In general, PPRs who are claiming out of pocket expenses only can do so without an adverse impact on their benefit entitlements. However, people who receive anything that might be deemed to be earnings or income by Her Majesty's Revenue and Customs service (HMRC) or the Department for Work and Pensions (DWP) – including an involvement payment – may put their benefit entitlement in jeopardy.

It is extremely important, therefore, that NHS Devon CCG works transparently and sensitively. Breach of benefit conditions can result in an individual's benefits being stopped or sanctions applied, sometimes for long periods – this can have huge consequences for individuals, potentially causing them significant financial hardship and personal distress.

For the avoidance of doubt, it is the responsibility of the individual PPRs to comply with the conditions of their benefits, and not NHS Devon CCG.

7.2 Involvement payments and income tax

PPRs are responsible for their own tax affairs, including ensuring that any income tax due on involvement payments is paid. If in any doubt about their income tax arrangements, PPRs are advised to contact their local tax office for guidance.

7.3 People in receipt of health insurance premiums

PPRs who are in receipt of an income from medical insurance (either as an individual or through their employer) – for example because they are currently on sick leave from work – should be aware that involvement activity, and especially acceptance of an involvement payment, may be a breach of their policy's terms and conditions, and could therefore put future payments at risk.

If in any doubt about the potential impact of involvement activity on medical insurance arrangements, PPRs are advised to contact their employer and / or insurance provider, as appropriate.

8 Working in partnership with other organisations

8.1 Representatives from other organisations

The Policy applies to individual patients, carers and members of the public who help NHS Devon CCG with our work. Paid workers from other organisations, including from the voluntary and community sector, who attend workshops, advisory groups and consultation events are expected to seek support from their own organisations.

However, representatives from small, user-led organisations (for example, those with an annual turnover of under £1million), may be supported with out of pocket expenses where they are not able to access any other public funds and where they may otherwise be unable to participate.

Where these organisations find that meeting the costs of participation is likely to cause difficulty, they should contact the NHS Devon CCG Lead Contact for the meeting or event.

8.2 PPRs working with multiple organisations

PPRs may be involved in working with several organisations, for example with NHS Devon CCG, a local authority, voluntary and community sector organisations and / or Clinical Commissioning Groups (CCGs).

If a PPR is claiming expenses (and / or an involvement payment) from one organisation for involvement in a specific piece of work, they <u>may not</u> claim expenses (and / or an involvement payment) from any other organisation for the same piece of work.

For example, if a PPR attends a workshop which is delivered jointly by a CCG and Devon County Council, the PPR can only claim expenses from either NHS Devon CCG OR the Council (not both).

8.3 Co-hosted meetings and events

When NHS Devon CCG is working jointly with other organisations (for example the local authorities or Public Health England), it should be made clear to PPRs in advance which organisation is responsible for PPR expenses.

The expenses policy implemented in these circumstances will be that of the lead organisation that is responsible for paying PPR expenses, and this should be communicated to PPRs in advance (i.e. prior to the meeting or event taking place).

8.4 Working with external partners to support participation

In certain circumstances, NHS Devon CCG will seek to commission specific engagement activities and / or to work in partnership with external organisations, for example voluntary and community sector organisations, to enable particular groups to participate, especially those from ‘seldom heard’ communities.

NHS Devon CCGs procurement procedures should be followed to commission this type of support.

When NHS Devon CCG has commissioned an external organisation to lead or co-lead activity to engage with patients, carers and members of the public, it may be more appropriate for the external partner organisation’s policy around reimbursement of expenses and / or offering involvement payments to be used.

For example, because the partner organisation’s policy is more tailored or suitable to supporting the ‘target audience’ of PPRs and / or because it allows greater flexibility, including in reimbursing expenses ‘on the day’ using petty cash (see NHS Devon CCGs Financial Scheme of Delegation and Limits Policy for more information) –

Information about which policy is being followed, and therefore what expenses PPRs can claim, how and from which organisation, must be made clear in advance.

Where any alternative policy or approach to expenses reimbursement and involvement payments is followed, it must be in line with the ‘principles’ set out in this Policy.

9 Working with children and young people

This Policy applies equally to children and young people as to adults and older people.

However, given the particular skills and knowledge needed to effectively involve and support children and young people, it may be more appropriate to work with an external organisation experienced in this field, and to use their policy for reimbursing expenses / offering involvement payments (as outlined in sections 8.3 and 8.4).

Care should be taken to proactively cover children and young people’s travel and subsistence costs, rather than expecting them to pay out of their own funds and await reimbursement – as this may not be possible for some children and young people.

10 Safe ways of working

The PPR Policy and NHS Devon CCGs Safeguarding Policy provide advice around safeguarding, health and safety, Disclosure and Barring Service (DBS) checks and other considerations to support the safety of PPR Partners, NHS Devon CCG staff and external organisations.

Where it is proposed to engage with communities or groups who are known to have specific safeguarding needs, for example looked after children or people who have experienced domestic abuse, it is recommended that NHS Devon CCG works in partnership with organisations with expertise and experience in engaging with the relevant community or group (see section 8.4).

11 Involving 'seldom heard' groups

This Policy should be used to support the involvement of 'seldom heard' groups in NHS Devon CCG's work, including through removing and minimising financial and other barriers to participation.

It is recommended that NHS Devon CCGs Equality, Diversity and Inclusion Team are a key point of contact to provide support, advice and guidance.

Equality, Diversity and Inclusion Team: 0300 123 1672
D-CCG.equalityanddiversity@nhs.net

12 Distribution, monitoring and review

This Policy is for implementation by all NHS Devon CCG staff.

It will be publicised and made available via the NHS Devon CCG intranet and on the public facing webpages. It is also available on request by emailing:
D-CCGCorporateServices@nhs.net

NHS Devon CCG Lead Contacts are responsible for ensuring that all PPRs are provided with a copy of this Policy and other relevant information, including an expenses claim form, in advance of any meeting, event or activity.

The implementation of this Policy will be monitored by the Communications and Engagement team, and it will be reviewed on a yearly basis. Comments or suggestions to be considered as part of a review should be forwarded to the Communications and Engagement team (see contact details in section 15).

HMRC dispensation arrangements will be updated as required to ensure compliance with HMRC requirements.

13 Statutory and other duties

NHS Devon CCG follows good practice and has a duty to provide accurate information about expenses and involvement payments when asked to do so by Government agencies including the Benefits Agency, Department for Work and Pensions (DWP) and Her Majesty's Revenue and Customs (HMRC). Records of payments made will be maintained by NHS Devon CCG for audit purposes.

Management of information about PPRs should follow the requirements of NHS Devon CCG's Information Governance Policy. All personal data is securely stored and appropriately managed in line with the Ftaxiand registered on our Information Asset register.

NHS Devon CCG staff who suspect that PPRs expenses claims are of a fraudulent nature should follow advice on the NHS Fraud and Corruption Reporting website. Genuine mistakes are not fraud, but PPRs should bring them to the attention of their NHS Devon CCG Lead Contact as soon as they are identified.

NHS Devon CCG Lead Contacts have a duty to query any apparent anomalies with the relevant PPR in the first instance.

14 Equality and health inequalities

This Policy forms part of NHS Devon CCG commitment to create a positive culture of dignity and respect for all individuals, including staff, patients, families and carers as well as community partners. The intention is to promote positive practice and value the diversity of all individuals and communities and to identify, remove or minimize discriminatory practice with regard to the characteristics given protection by the Equality Act 2010.

NHS Devon CCG's public and patient participation activities will support NHS Devon CCG to meet the public sector equality duty and the duty to reduce health inequalities, provided full consideration is given to working with a diverse range of PPRs and supporting participation from groups that experience inequalities in health outcomes.

This Policy will specifically support NHS Devon CCG to involve PPRs from protected characteristic and other such groups, who may otherwise experience financial barriers to involvement.

15 Contact details

NHS Devon CCG staff with queries about this Policy and / or in need of support with reimbursing PPRs expenses or paying involvement payments should access the resources available on the intranet in the first instance.

PPRs and others with queries about this Policy should access resources available on NHS Devon CCGs website.

All queries can also be sent to the Communication and Engagement team by emailing D-CCGCorporateServices@nhs.net or calling **01392 674801**.

Appendix 1 – Conditions for payment of expenses

1. Overview

NHS Devon CCG will reimburse all reasonable expenses incurred by PPRs supporting us as long as they are in line with this Policy, agreed in advance and do not exceed agreed rates (see below).

NHS Devon CCG will reimburse expenses incurred by PPRs where meetings or events are cancelled at short notice, for example where arrangements have been made for carer support and cannot be cancelled without penalty.

Receipts are required for all expenses, except where travel and accommodation is booked directly by NHS Devon CCG. NHS Devon CCG will reimburse the actual expenses incurred by PPR and not approximate or 'rounded' amounts.

NHS Devon CCG staff making travel and accommodation bookings (and making arrangements to reimburse other out of pocket expenses) on behalf of PPRs should use the correct cost code for the programme of work that the PPR is taking part in.

There may be instances where the costs of participation are a barrier to involvement in ways which are not directly covered by this Policy. NHS Devon CCG will encourage PPR to discuss their needs with their Lead Contact so that solutions can be explored. Assessment of such situations, and the support provided, will be on a case-by-case basis.

2. Travel

NHS Devon CCG has a central booking facility for train travel (including London underground). We aim to reduce the burden of costs for PPR and will aim to pre-book (and pay for) all train travel for PPRs in advance so they are not out of pocket. The NHS Devon CCG Lead Contact will explain how to request travel booking (and explore any accommodation needs – see section 3 below).

NHS Devon CCG staff are requested to ensure all travel bookings are in line with the NHS Devon CCG local processes. Please contact d-ccg.hr@nhs.net for further information and guidance

PPR should use public transport for travel purposes (where it is practical, safe and reasonable to do so) to support the NHS in reducing its carbon emissions.

PPR may travel by private car where this is agreed to be the most suitable form of transport.

Rail / train travel

NHS Devon CCG Lead Contacts should book rail / train travel on behalf of PPRs using the central booking facility. The Lead Contact will need to liaise with PPRs in order to understand their requirements.

While NHS Devon CCG will usually book and purchase rail travel on behalf of PPR Partners, we recognise that on some occasions this will not be possible. Booking arrangements will need to be made in good time to ensure that cost effective travel options can be utilised and any tickets can be posted to or collected by the traveller.

NHS Devon CCG staff should ask PPRs about the most cost effective and convenient routes for them and whether they have a rail card which may be used to reduce costs.

Should a meeting or event change, PPRs will be asked to return any unused tickets and the NHS Devon CCG Lead Contact should rebook / amend the travel booking through the local booking system. Where tickets have not yet been collected, for example 'tickets on departure', PPR should not collect them as this will allow the NHS Devon CCG Lead Contact to process a refund (where possible) via the central booking system.

Rail travel will be via standard class. First class travel is not permitted unless this is needed for reasons of disability or other medical / health / access need, for example, where PPR require a larger / more supportive seat to transfer to from a wheelchair and / or table service (where this is not available in standard class) as they are unable to move safely through the train.

These requirements must be discussed and agreed in advance between the PPR Partner and the NHS Devon CCG Lead Contact. Evidence (for example a medical note) may be required to support the request.

All requests for first class travel which have been initially agreed by the lead contact and should be sent to the delegated budget holder for review and approval (and central logging).

Bus travel

The cost of travel by bus will be reimbursed, when accompanied by receipts or tickets stating the price paid for travel.

Taxis

Taxis may only be used where there is a justification on the grounds of:

- Cost effectiveness due to multiple people travelling to the same place;
- Personal safety, for example travelling late at night;
- Disability, impairment or long-term condition;
- Efficiency, for example meetings held in different parts of a city during the day;
- Travelling with heavy or bulky items of equipment or luggage;
- Where it is the only feasible mode of transport.

PPRs wishing to travel by taxi should discuss this in advance with the NHS Devon CCG Lead Contact, but any claims for the cost of travel by taxi should be evidenced through receipts.

The CCG holds an account with a taxi company in order that payment can be made upfront. Access to this account will be through the Lead Contact who will make the necessary arrangements to facilitate where the PPR would find it difficult, or are unable, to pay upfront for the cost of a taxi.

Personal vehicles (travel by private car or van)

PPRs can use their own vehicles to travel to meetings or events when necessary and will receive reimbursement for the miles travelled. If a PPR Partner finds they need to use their own vehicle for travel they should indicate this to the NHS Devon CCG Lead Contact.

Rates of reimbursement are in line with Her Majesty's Revenue and Customs (HMRC) Service recommendations, taken from the HMRC website and correct as at April 2017.

When PPRs are travelling by personal vehicle, they must have a valid UK driving license, and the vehicle must have valid insurance, tax and MOT certificate.

HMRC approved mileage rates		
	First 10,000 business miles in the tax year	**Each business mile over 10,000 miles in the tax year**
Cars and vans	45p	25p
Motorcycles	24p	24p
Bicycles	20p	20p

The cost of car parking to enable a PPR to attend a meeting or event will usually be reimbursed on production of receipts. PPRs are expected to use the most cost-effective parking options available, having due regard for personal safety and other considerations, especially when travelling at night.

PPRs who necessarily incur charges in taking part in NHS Devon CCG activities, for example tolls and congestion charges, will be refunded on production of receipts.

<u>**PPRs are personally liable for any excess parking penalties, charges or fines issued to them and NHS Devon CCG will provide no refunds on these charges.**</u>

Similarly, excess fare charges on any means of public transport are normally the responsibility of the PPRs and not NHS Devon CCG, unless it can be demonstrated that this was an unavoidable circumstance beyond their control.

If a passenger is carried by personal vehicle (car or van) to the same meeting or event, an additional 5p per mile can be claimed. This is in line with HMRC recommended rates (as at April 2017).

Air travel

All travel by aircraft will be at standard economy rate and will be booked by NHS Devon CCG

<u>In all cases</u> written approval must be gained from the relevant delegated budget holder prior to any air travel bookings being made.

3. Accommodation

Although it will not be usual for NHS Devon CCG to cover the cost of accommodation, this may be appropriate in some circumstances. For example, for activities that start at a time when an overnight stay prior to the event would support the PPR to participate.

Accommodation requirements must be discussed and agreed in advance between the PPR and the NHS Devon CCG Lead Contact.

NHS Devon CCG has a central booking facility for accommodation and will usually book and purchase accommodation on behalf of PPR Partners to ensure that any booking is in line with NHS Devon CCGs local processes. Please contact d-ccg.hr@nhs.net for further information and guidance

Booking arrangements should be made in good time to ensure that cost effective options can be utilised and appropriate accommodation can be secured, including accommodating any access needs.

4. Subsistence (food and drinks)

If PPRs are involved in NHS Devon CCG activities which require them to be away from home for considerable periods of time, reimbursement for the cost of meals and drinks (often known as 'subsistence') may be claimed as below. Receipts must be retained and submitted with the claim.

Breakfast (when leaving home before 7am)	**Up to a maximum of £5**
Lunch (when away from home for more than 4 hours including between the hours of 12noon and 2pm)	**Up to a maximum of £5**
Evening meal (when away from home after 5pm)	**Up to a maximum of £15**
Maximum total claim per 24 hour period	**Up to a maximum of £25**

Note that the rates above are the maximum amounts which may be claimed when accompanied by receipts demonstrating actual expenses incurred and are not 'flat rates'.

PPR who choose to spend more than the maximum rates will be reimbursed for receipted costs up to the maximum rates only.

These rates include the cost of food and drinks but in line with NHS Devon CCG policy **the purchase of any alcoholic drinks will not be reimbursed.**

Where refreshments and food are provided at meetings / NHS activities, subsistence allowances will not be paid except in exceptional circumstances such as in order to meet dietary requirements that have not been catered for as part of the meeting – this must be agreed with the NHS Devon CCG Lead Contact in advance.

Please note that tips and discretionary service charges, for example in restaurants, will never be reimbursed and remain solely at the individual's discretion.

5. Carers and support workers

NHS Devon CCG recognises that in some circumstances PPRs 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 or care of a family member with a disability or other additional needs).

NHS Devon CCG will meet the reasonable costs incurred by PPR for carers / support workers. There is no 'set rate' for carer / support worker costs, as we understand that this can vary significantly depending on the type of care and / or support needed by individuals. NHS Devon CCG will reimburse the actual costs incurred by the PPR based on receipts or other evidence of expenditure such as an invoice submitted with expenses claim forms.

NHS Devon CCG is not able to pay carers / support workers (or agencies) directly. For the avoidance of doubt, the carer or support worker is engaged by the PPR and not by NHS Devon CCG. The receipt should provide details of the carer's / support worker's registration and / or the professional organisation providing the care.

NHS Devon CCG is also not able to pay any 'nominal amount' for the provision of care by a non-registered / non-professional or 'informal' carer, such as a family member or neighbour.

If a PPR wishes to be accompanied / supported by a non-registered / non- professional carer or support worker to support them to effectively participate, such as a family member, then NHS Devon CCG will cover their expenses, for example travel costs, in addition to covering the PPRs own expenses.

NHS Devon CCG will cover the hourly rate costs of the carer / support worker where these costs are not normally covered elsewhere (for example via service user payments from other public funds such as social services).

Within the above guidelines, NHS Devon CCG will cover the following costs:

- The hourly rate cost for a carer, support worker, Personal Assistant (PA), advocate or other professional supporting an individual to effectively participate to accompany and support a PPR at a meeting or event. This includes hourly rate costs for travel time to and from a meeting or event (if appropriate).
- The expenses incurred by a carer, support worker, PA, advocate or other professional supporting an individual to effectively participate in travelling to and from, and attending, a meeting or event, for example food and drink (in line with this Policy and in addition to covering the PPRs own expenses). Note that such expenses would be reimbursed back to the PPRs on submission of an expenses claim form and not to the carer / support worker directly (alternatively travel may be booked by NHS Devon CCG on their behalf).
- The hourly rate cost for a carer (or carers if required) to take over caring responsibilities while a PPR is at a meeting or event. This includes care for a family member, disabled child or other dependent person with care needs. It also includes the hourly rate costs of replacement care which is needed to enable a PPR to travel to and from a meeting or event.
- The hourly rate cost for childcare for pre-school age children and / or for childcare outside of school hours, while a PPR is at a meeting or event (including travel time).
- The expenses incurred by an ‘informal’ / non-professional / non-registered carer, such as a family member, to accompany a PPR when travelling to and from a meeting or event and / or to support them to participate in a meeting or event (in line with this Policy and in addition to covering the PPRs own expenses).

Reimbursement of carer / support worker costs includes support needed by young carers, for example for a carer to take over caring responsibilities for a family member while a young carer attends a meeting or event.

Where reimbursement is needed for carers / support workers, this is looked at on a case by case basis and must be agreed between the PPRs and the NHS Devon CCG Lead Contact in advance of the activity / any booking being made or expense occurred.

7. Accessible information and communication support

Please refer to the NHS Devon CCG website for providing information in alternative languages and formats, and professional communication support to support PPRs, as appropriate.

This includes the provision of information in alternative formats such as easy read or braille, and in alternative / community languages. It also includes the arrangement of professional communication support to enable PPR to participate effectively in meetings and events, for example British Sign Language (BSL) interpreters and speech -to-text-reporters.

PPRs with a need for information in an alternative language and / or format, and / or for communication support, should inform their NHS Devon CCG Lead Contact as soon as possible to enable appropriate arrangements to be made.

Where individuals have specific, personal and / or complex needs, and prefer to arrange their own support, NHS Devon CCG will reimburse these costs where agreed in advance with the NHS Devon CCG Lead Contact, and with evidence of expenditure such as receipts.

8. Office supplies

NHS Devon CCG recognises that some PPRs will make use of home office supplies as part of their involvement with us. This might include use of a telephone or internet connection to join meetings remotely, and / or it might include printing out papers at home that have been sent via email.

Where PPRs are supporting NHS Devon CCG at meetings, events or workshops, paperwork should be posted out in advance or available on the day with time allocated for reading or working on this material as appropriate.

However, whilst PPRs can always request that hard copies of papers be posted to them at home (and NHS Devon CCG Lead Contacts should meet these requests), we understand that it is not always possible within meeting timescales.

Therefore, where PPR support NHS Devon CCG by participating in meetings remotely from their home we will offer a standing allowance of £5 per meeting to cover the cost of telephone calls, paper, printing ink and paper, stamps, internet connection, stationery and other home office sundries (without the need for evidence such as receipts).

We have taken this approach to reduce the administrative burden on PPRs in, for example, estimating proportionality of broadband usage, producing monthly copies of telephone bills, estimating ink used and so on.

PPRs wishing to claim this amount must agree this in advance with the NHS Devon CCG Lead Contact.

PPRs who have a need for additional support to enable them to participate in remote meetings and / or to read papers or documents, for example because of a disability, should discuss this with their NHS Devon CCG Lead Contact.

9. Reclaiming process - responsibilities

Responsibility of NHS Devon CCG

NHS Devon CCG believes that the process for reimbursing expenses should be as straightforward as possible for PPRs. Paperwork should be in plain English and easy to understand and complete.

NHS Devon CCG staff, and especially Lead Contacts, must ensure that PPRs are aware of this Policy and how it applies to the meeting or event they are being invited to join. For example, information about involvement opportunities and events must make clear whether PPR can have out of pocket expenses reimbursed and / or whether an involvement payment is being offered. PPRs should be provided with a copy of this Policy and access to the expense claim process in advance of the activity or event.

The NHS Devon CCG Lead Contact will ensure that:

- Information about expense claims is provided in advance of the meeting / event so that PPRs can be clear about our processes.
- Copies of expenses claim forms are brought to events / meetings and also available via email.
- Support and guidance is provided to any PPR who needs help or further information to complete expenses claim forms.
- PPRs are advised to liaise with relevant agencies should they be in receipt of any state benefits (see section 7).

If PPRs have a need for information in alternative formats or languages, or support to understand the Policy or to complete expenses claim forms (for example because they have a learning disability or low literacy), they should discuss this with the NHS Devon CCG Lead Contact.

A copy of an expenses claim form is available as part of this Policy

Reimbursement needs to happen quickly so that PPRs are not put into financial hardship – this is also why we aim to book travel and accommodation for PPR directly where possible to avoid PPRs being out of pocket.
We aim to reimburse PPRs within two weeks of receiving their claim form (and other relevant information, such as receipts).

The NHS Devon CCG Lead Contact will need to ensure that they prioritise PPR expenses claims to ensure timely reimbursements are made. This means that if there are any queries the Lead Contact should contact the PPR urgently to seek clarification.

Responsibility of PPRs

PPRs seeking reimbursement of expenses must complete and submit an expense claim form and provide evidence of expenditure (usually in the form of a receipt or ticket).

PPRs can only reclaim their own expenses, and those of a carer / support worker, and cannot claim for expenses on behalf of other PPR/ colleagues.

Any PPR Partner experiencing difficulty in completing the expenses claim form should contact their NHS Devon CCG Lead Contact in the first instance, as it may be possible to arrange for additional support to be provided.

Where appropriate, NHS Devon CCG will reimburse the cost of a support worker needed to support an individual in submitting an expense claim form, for example if the PPR has a learning disability and / or need for communication support.

PPR are advised to keep copies of their submitted expenses claim forms, and a record of payment / reimbursement, including in case of query by HMRC or other agencies.

PPRs should submit claims in a timely manner, not more than three months after the event / activity that their claim refers to.

Where receipts are difficult to obtain, printouts / screenshots with the relevant section highlighted can be accepted.

If receipts are lost, the PPR should discuss this with the NHS Devon CCG Lead Contact.

10. Reclaiming Expenses – Processing Claims

PPR expense claims are processed by the NHS Devon CCG Lead Contact from the programme team who is working with the PPR Partner(s).

The NHS Devon CCG Lead Contact is responsible for ensuring that:

- PPR have received this Policy and claim documents in advance of the meeting, event or activity.
- Claim forms following the meeting, event or activity are received (by email or post).
- Actions are taken to check that claims are appropriate and in line with NHS Devon CCG requirements and this Policy.
- An audit log of claims made and associated receipts is maintained. This is essential for robust financial governance procedures and centrally maintained internal audit evidence.
- Claims are uploaded for processing via the Oracle system.
- Claims are submitted (via Oracle) for approval for payment against the programme cost code(s).

Once claim forms are received, reimbursement can happen rapidly. If the claim form is checked and entered onto our financial system in good time, the authorising officer for cost centres can approve on a weekly cycle, raising payments on a weekly basis.

Note that PPR expenses are exempt from ‘No Contract, No Purchase Order, No Payment’ rules and no Purchase Order is required.

Step-by-step process

Expenses reimbursement happens via the following process:

1. The PPR Partner submits their completed expense claim form and receipts to the NHS Devon CCG Lead Contact or their nominated business manager.

2. The NHS Devon CCG Lead Contact / nominated business manager should check the form and, if required, raise any queries directly with the PPR Partner.

3. The NHS Devon CCG Lead Contact / nominated business manager forwards the checked approved expense claim form to their delegated budget holder for approval.

4. Once approved, the NHS Devon CCG Lead Contact / nominated business should send the approved claim to you dedicated finance lead for input into NHS Devon CCG payment system.

5. Payment via the preferred method will then be sent to the PPR.

PPRs who do not have bank accounts or who have difficulty managing cheque payments should liaise with the NHS Devon CCG Lead Contact who can explore alternative arrangements.

Useful forms

The following forms should be provided to PPR who decide to take part in our work. The NHS Devon CCG Lead Contact is responsible for ensuring that a copy of this Policy and the correct expense claim form are provided.

For completion electronically and emailed to the Lead Contact:

NHS Devon CCG
2019 PPR Expenses c

For completion by hand to be posted (or scanned in and emailed to the Lead Contact):

NHS Devon CCG
2019 PPR Expenses c

Copies of both these forms can be found on the NHS Devon Website