

## Health Education England's Patient & Public Voice Remuneration Policy

### Members' Version

#### Introduction

HEE exists to help improve the quality of care delivered to patients and HEE is committed to ensuring that patient and public voice is at the centre of what we do. Putting patients at the heart of the education, training and workforce planning process will ensure a better connection between the decisions and investments we make and the quality of care and experience patients receive.

#### Encouraging patient and public voice activity in our work

HEE is committed to removing barriers to participation and works on the overriding principle that no individual should be out of pocket where they are providing patient and public voice to HEE.

In March 2014, HEE's Executive Board agreed levels of payment for patient and public voice activity in HEE with the aim of providing a flexible framework within which HEE staff can use as a guide for appropriate levels of payment for specific activity. A payment matrix is set out below and HEE staff should use the matrix below as a guide and use the 'standard' rate as the baseline for payment.

Engagement Level	Type of Activity	Standard Rate
1	<p><b>General Patient and Public Voice</b></p> <p>Where a patient or member of the public is invited to attend a HEE meeting to express their views, or take part in a large public consultation, participate in an online poll/survey/general focus group. Involvement which requires a willingness to share views and experience but little or no specialist knowledge or expertise.</p>	<p>Out of pocket expenses only - discretionary payments of up to a maximum of £50 per day may also be considered to encourage participation. Any discretionary payments must have prior approval from the Executive Director responsible for the area of work</p>
2	<p><b>Local Expert Patient and Public Voice Partner</b></p> <p>Where patient and public voice partners have been identified to provide specialist and expert advice to Local Education &amp; Training Board advisory groups including specialist focus groups, working groups and task &amp; finish groups. Participation in local policy development activity that requires specialist knowledge and expertise.</p>	<p>Up to a maximum of £150 per day plus out of pocket expenses</p>
3	<p><b>National Expert Patient and Public Voice Partner</b></p> <p>Where patient and public voice partners have been identified to provide specialist and expert advice to HEE's advisory structure, including the Board, Strategic Advisory Forum, Patient Advisory Forum and HEE Advisory Groups. Participation in national policy development activity that requires specialist knowledge and expertise.</p>	<p>£150 per day plus out of pocket expenses - <i>which by exception, may be increased to a maximum of £300* with prior approval of the Finance Director.</i></p>

*\*Any requests for the maximum rate of up to £300 must be made in writing to HEE's Director of Finance via [HEE.PPVenquiry@nhs.net](mailto:HEE.PPVenquiry@nhs.net). The Director of Finance will then be required to submit a business case for each individual request to the Department of Health, which will then need approval before the higher rate can be paid.*

## **Definition**

By using the term 'patients and public voice partners' we include patients, service users, carers and relatives of patients, and the general public.

## **Key Principles**

- HEE will enable people to take part, not assuming that one size fits all – ensuring, where possible, that patients and the public are able to contribute effectively through different approaches to participation. For example, acknowledging that not everyone can travel and make face to face meetings, online options are useful but do not suit everyone, weekday and day time meetings are often not suitable for people to join.
- HEE is committed to diversity and recognises that patients and carers often have complex conditions or circumstances and this will mean making bespoke arrangements to support involvement.
- HEE will treat people's input respectfully, ensuring that our engagement with patients and the public is never a "tick box" exercise.
- HEE will always formally thank patients and the public for their participation by letter or email.
- HEE will ensure that we feedback what happened as a result of the advice given to us by patients and the public. Where things cannot be changed, HEE understand the importance of communicating this too.
- HEE will cover any reasonable out of pocket expenses including (but not limited to) travel, accommodation and carer support where necessary.
- HEE will book and pay for travel and accommodation on behalf of individuals to reduce the burden of cost and to ensure the best price by booking in advance.
- HEE will always offer the option of printing and sending out hard copies of papers to the individual's home address well in advance of meetings.

## **Reclaiming Expenses**

What out of pocket expenses can be claimed?

- Travel (including fares, mileage and car parking)
- Accommodation
- Subsistence
- Costs associated to where someone is accompanied by a carer/support worker

HEE will reimburse all reasonable expenses incurred by patient and public voice partners. Receipts are required for all expenses, except for travel and accommodation booked by HEE.

There may be instances where the costs of participation are a barrier to people becoming involved in our work. Should such situations arise, HEE will explore solutions on a case-by-case basis.

The rates will be the same as those claimed by HEE/NHS Staff. For ease of reference the current rates are:

Type of Expense	Level of Payment
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<b>Travel:</b>	
Train	<ul style="list-style-type: none"> <li>• Where possible train tickets should be booked using HEE's travel booking system; booking should be made as far in advance as reasonably possible.</li> <li>• Travel should normally be standard class unless a first class ticket can be purchased at a cheaper rate than the standard ticket.</li> </ul>
Travel within London	<ul style="list-style-type: none"> <li>• Patient and public voice partners who regularly travel within London will require an Oyster Card. The initial cost of the Oyster Card may be reclaimed, with a receipt, through the expenses process. The HEE National Patient &amp; Public Voice Team/HEE Local Patient &amp; Public Voice Co-ordinators are responsible for ensuring patient and public voice partners surrender their Oyster Card once their agreed engagement period with HEE ends.</li> <li>• Oyster Cards must be registered online and a record of all journeys made should be printed off each month and retained. These records will be randomly checked from time to time. The HEE National Patient &amp; Public Voice Team/HEE Local Patient &amp; Public Voice Co-ordinators are responsible for ensuring patient and public voice partners are using the Oyster Card appropriately.</li> <li>• Oyster Card holders should top-up their card as and when this is required. Top-ups may be reclaimed through the expenses process and should be for a minimum of £10 and a maximum of £40 per top-up, a receipt will be required.</li> </ul>
Taxis	<ul style="list-style-type: none"> <li>• Taxis may be used on any of the following occasions: <ul style="list-style-type: none"> <li>a) the overall cost is cheaper than using public transport due to the number of patient and public voice partners sharing</li> <li>b) there is a demonstrable and necessary saving in official time; for example, where public transport is not readily available for the journey or it would take much longer</li> <li>c) the traveller has special requirements e.g. a disability which makes the use of other public transport particularly difficult or impossible</li> <li>d) heavy luggage or equipment is being transported</li> <li>e) there is a personal safety risk</li> <li>f) there are no other forms of public transport available to and from the location of the essential business journey.</li> </ul> </li> <li>• HEE does not, as standard, hold taxi contracts. Where possible taxis should be booked in advance. Taxi fares will be reimbursed with a valid receipt through the expenses process.</li> </ul>
Use of Personal	<ul style="list-style-type: none"> <li>• Patient and public voice partners will be reimbursed for</li> </ul>

Vehicles	<p>miles travelled in the performance of their duties.</p> <ul style="list-style-type: none"> <li>• Mileage rates are payable at the rate set by NHS Employers. (see <a href="http://www.nhsemployers.org/your-workforce/pay-and-reward/pay/pay-and-conditions-circulars">http://www.nhsemployers.org/your-workforce/pay-and-reward/pay/pay-and-conditions-circulars</a>)</li> <li>• HEE will not pay any penalty imposed under the Road Traffic Acts or any associated expense arising from a traffic accident or offence.</li> <li>• Parking and tolls will be reimbursed upon production of a valid receipt. When parking, patient and public voice partners should always opt for the most cost-effective option (i.e. long/short stay)</li> </ul>
<p><b>Subsistence:</b>  The purpose of this section is to reimburse patient and public voice partners for the necessary extra costs of meals, accommodation and travel arising as a result of official duties away from home. Business expenses which may arise, such as the cost of a fax or official telephone calls, may be reimbursed with certificated proof of expenditure.</p>	

Day Meal Allowance	<ul style="list-style-type: none"> <li>• Where a patient and public voice partner is away from their base for more than five hours on official business, a meal allowance is payable.</li> <li>• A day meal allowance is only payable where a patient and public voice partner spends more on meal/s than they normally would at their place of work.</li> <li>• To claim a lunch meal allowance a patient and public voice partner should normally be away from their work base for more than five hours, and covering the period from 12pm – 2pm.</li> <li>• To claim an evening meal allowance a patient and public voice partner should normally be away from their base for more than ten hours, and unable to return to their base or home before 7pm.</li> <li>• The rates payable for meals are set out below:</li> </ul> <p><b>Day Meals Subsistence Allowances</b></p> <ul style="list-style-type: none"> <li>• Lunch Allowance (more than five hours away from base, including the lunchtime period between 12:00 pm to 2:00 pm) £5.00</li> <li>• Evening Meal Allowance (more than ten hours away from base and return after 7:00 pm) £15.00</li> </ul>
Overnight Stays	<ul style="list-style-type: none"> <li>• Where a patient and public voice partner is required to stay overnight in a hotel, guesthouse or other commercial accommodation HEE will book/reimburse the cost of the accommodation. HEE will also reimburse a meals allowance to cover the cost of an evening meal and another day time meal at the rates set out below.</li> <li>• Where a patient and public voice partner is required to stay overnight in a hotel this should normally be booked through HEE’s travel booking system. In exceptional circumstances where accommodation is required at short notice, this will be reimbursed with a receipt through the expenses process.</li> <li>• When booking accommodation, the most cost effective and practical option should be used. The limits set out here are maximum amounts; it is expected that often accommodation will be sourced at a lower rate than these limits.</li> <li>• For accommodation within London, the overnight rate should not normally exceed £150. Where meals are included (or not claimed) this rate may be increased to £170.</li> <li>• For accommodation outside of London, the overnight rate should not normally exceed £120. Where meals are included (or not claimed) this rate may be increased to £140.</li> <li>• Where a patient and public voice partner stays overnight with friends or relatives (or in other non-commercial accommodation) a flat sum rate will be paid as set out below, this includes an allowance for meals.</li> </ul>

	<p><b>Overnight Stay Allowances</b></p> <ul style="list-style-type: none"> <li>• Actual receipted cost of bed and breakfast up to and in accordance with the limits set above.</li> <li>• Meals Allowance per 24 hour period: £20.00</li> <li>• Night allowances in non-commercial accommodation per 24 hour period: £25.00</li> </ul>
Incidental Expenses (For example: cost of phone calls, stationery)	<ul style="list-style-type: none"> <li>• Phone calls necessary for involvement in tasks – at cost price</li> <li>• Stationery – reasonable costs (agreed in advance)</li> </ul>

## **Overcoming Barriers to Participation**

### Carers and Support Workers

HEE recognises that in some circumstances patient and public voice partners will need to arrange for carers/support workers to accompany them to a meeting, or to take over caring responsibilities while they are a meeting (including child care, care of partner, relative or friend).

HEE will cover the expenses/costs of carers/support workers where these costs are not normally covered elsewhere (for example via service user support payments from other public funds e.g. social services).

HEE staff should use the matrix below as a guide. These rates are based on the Social Care Institute for Excellence payments for people who use services and carers.

<b>Type of Support</b>	<b>Rate</b>
Travel to and from meeting for Patient & Public Voice Partner and their personal assistant/support worker	As outlined above in the out of pocket expenses matrix
Replacement support provided to enable people to attend a meeting/event/workshop – this could include: <ul style="list-style-type: none"> <li>• Child care</li> <li>• Replacement care for sick or disabled partner, relative or friend</li> </ul> Support that the individual themselves require – this could include: <ul style="list-style-type: none"> <li>• Personal assistant</li> <li>• Support worker</li> <li>• Interpreter</li> </ul>	Up to a maximum of £15 per hour plus out of pocket expenses as outlined above

Where reimbursement is needed for carer/support workers, this is looked at on a case by case basis and should be agreed in advance with the HEE National Patient & Public Voice Team/HEE Local Patient & Public Voice Co-ordinators.

### Interpreting, British Sign Language and Other Communication Support

In general communication support will be arranged as part of the meeting/event and should look to include interpreters or other forms of communication support. Where individuals have specific/complex needs, and prefer to arrange their own support, this is looked at on a case by case

basis and should be agreed in advance with the HEE National Patient & Public Voice Team / HEE Local Patient & Public Voice Co-ordinators.

#### People in Receipt of State Benefits

Some of our patient and public voice partners may be in receipt of state benefits. Each patient and public voice partner is personally responsible for any liability with regard to Income Tax or National Insurance contributions and they are asked to acknowledge this responsibility each time they claim the payment.

Payment of out of pocket expenses should not affect any state benefits. However, because HEE offers subsistence payments, these payments may be considered as income and therefore subject to Income Tax or National Insurance contributions by Her Majesty's Custom and Revenue service (HMRC) and may put the individual's benefit entitlement in jeopardy.

People who receive anything that can be deemed to be income by HMRC may put their benefit entitlement in jeopardy. Patient and public voice partners receiving any payments or incentives should be made aware that this may impact on their entitlement to benefits. Income can include any payments made, or vouchers or financial gifts given. Breach of benefit conditions can result in benefits being stopped. Rules and regulations around receiving income while in receipt of benefits vary significantly according to individual circumstances, so patient and public voice partners will have a responsibility to ensure that they have checked with the relevant agencies.

HEE will work sensitively to provide support for any of our patient and public voice partners in receipt of state benefits while ensuring we are acting transparently and in accordance to HMRC rules and regulations.

#### **Reclaiming Honorarium and Expenses**

To reclaim expenses incurred and the agreed honorarium payment, all Patient and Public Voice Partners must complete an invoice (**Appendix A**) and attach any original receipts. All forms must be typed and not hand written and completed in full. Failure to do this will result in payment delays or non payment.

Completed forms and original receipts must be sent to the HEE National Patient & Public Voice Team/HEE Local Patient & Public Voice Co-ordinators where applicable. Once authorised by the HEE National Patient & Public Voice Team/HEE Local Patient & Public Voice Co-ordinators, the completed form and original receipts will be submitted to NHS Shared Business Services for payment. Payment will be made within 30 days of receipt by NHS Shared Business Services.

Patient and Public Voice Partners are responsible for informing HMRC of payments for services. HEE may be required, as deemed appropriate by the organisation, to gather evidence from our patient and Public Voice Partners that they have demonstrated compliance with declarations of earnings.

#### **Review of Policy**

This policy will be reviewed and updated as appropriate. Rates and allowances will be taken directly from the NHS Staff Terms and Conditions Handbook and will be updated in accordance with this.