

Reimbursement & recognition for patient, carer, & public involvement

UCLPartners is committed to involving and engaging patients, carers and the public in everything we do, and recognising the contributions patients, carers and the public make to our work, through: financial reimbursement; supporting skill development; recognition awards; accountability and transparency around 'you said, we did'; case study publication.

This policy outlines the reimbursement and recognition of time for patient partners involved in our work.

Reimbursement for expenses and time are some ways in which we ensure that patients, carers and the public (referred to as patient partners throughout the policy) have an equal opportunity to get involved. This document provides guidance to patient partners and UCLPartners staff, outlining specific rates for expenses and recognition for time. It is relevant in situations where patient partners have become directly involved in UCLPartners work.

Alongside financial reimbursement and recognition of time, UCLPartners offers:

- Appropriate learning and development opportunities to support patient partners' work with us
- Contributions by patient partners will be acknowledged in internal and external reports, publications, posters and presentations, where appropriate
- Annual awards for patient partners involved in our work and for work done with patient partners
- News and information about other opportunities to get involved, ongoing work, and updates on work patient partners have been involved with

Overview of our reimbursement for expenses and recognition of time policy

UCLPartners approves reimbursement of expenses in advance before patient partners take part in an involvement activity. This helps us to identify needs beforehand, to book and pay for expenses directly if appropriate (for example train tickets and hotel accommodation), and agree upfront any other expenses which patient partners might claim reimbursement for.

UCLPartners offers recognition of time, expertise and skills vouchers, where appropriate and possible and for pre-approved involvement activities. UCLPartners will always make clear for patient partners what payment, if any, will be offered for specific involvement activities. Recognition of time vouchers are not offered for training activities.

I. What we offer

a. Reimbursement of expenses

- Travel – public transport except in exceptional circumstances
- Accommodation – where patient partner is required overnight or early morning
- Subsistence – where catering is not provided
- Alternative carer costs
- Accompanying carer costs (for travel, accommodation, subsistence)

b. Recognition of time vouchers

- Voucher(s) of up to £100 for a half day and up to £200 for a full day

II. How reimbursement will be made

- Ensure appropriate staff member has approved expenses and/or voucher
- Documentary evidence of any expenses provided (keep a copy for yourself)
- Payments processed within a month

III. What we need from you

- Contact details
- Bank details
- As involvement activities arise, outline of what expenses you are likely to incur as part of each to be approved by appropriate UCLPARTNERS staff member in advance of involvement activity
- Documentary evidence of expenses

Full policy on reimbursement and payment for patient partner involvement

1. Expenses

UCLPartners can cover travel, subsistence and accommodation expenses to enable a patient partner to become directly involved in our work, providing:

- the patient partner is taking part in or contributing to a specific event, training course, meeting, activity, or piece of work through UCLPartners, and;
- the patient partner has discussed with appropriate staff at UCLPartners **prior** to the activity, and potential expenses have been agreed in writing, and;
- the patient partner can provide evidence of expenses incurred in the form of receipts (following the activity), and;
- UCLPartners considers that the expenses are reasonable, appropriate and associated with the activity.

UCLPartners will reimburse expenses following receipt of the expense form and documentary evidence (receipts etc).

UCLPARTNERS can book and pay for expenses directly in advance (for example train tickets), and agree upfront any other expenses where reimbursement may be claimed. By booking and paying for expenses directly, it helps to ensure that patient partners are not out of pocket, as well as helping UCLPartners to obtain good value for money as we may be able to seek reduced rates or reclaim part of the VAT element.

1.1 What expenses can be covered?

Travel

UCLPartners can book and pay for travel expenses in advance of an involvement activity. This prevents patient partners being 'out of pocket' while waiting for expenses to be reimbursed. In certain situations it may not be possible for UCLPartners to book and pay for travel in advance of an activity. Providing the expected travel expenses have been preapproved by UCLPartners as part of their pre-approval of expenses process, the expenses may be reimbursed (with receipts attached to the claim form):

- Standard class rail fares (not first class), cheaper day or other reduced rail fares where possible. Only in exceptional circumstances, where value for money can be demonstrated and with appropriate (Director or delegated Officer) approval in advance, will reimbursement be made for first class train travel.
- Tube/Oyster - as a general rule in London, Tube travel will represent better value than taxis and the use of registered Oyster Cards is recommended – system printouts of oyster card journeys (only available if you register your oyster card) appropriately marked identifying journeys for patient partner duties will be accepted as receipts for the purposes of reimbursement.
- Taxis - The use of taxis will be reimbursed when alternative and/or convenient public transport is not available and/or the patient partner is unable to travel by public transport on medical grounds. Appropriate approval for taxi expenses must be sought in advance of patient partner involvement.
- Other travel expenses such as tolls and parking will be reimbursed when circumstances justify the expenditure incurred and they are at the cheapest rate available, and are supported by receipts.
- Mileage for car users, where necessary (please note that UCLPartners encourages the use of public transport where possible).

Own car or motorcycle mileage costs for patient partner involvement in UCLPartners work are reimbursed at 24p per mile and bicycle costs at 10p per mile if travelling by car for the shortest practical route calculated on AA route

planner. An additional 5 pence per mile will be reimbursed for each passenger carried, if the passenger is also actively involved patient partner opportunity. This is in line with HM Revenue and Customs (HMRC) policy which describes reimbursement for individuals “carrying fellow employees... which are also work journeys for them”. If a carer or personal assistant is travelling with a patient partner in the same car, no passenger mileage is payable for the carer / personal assistant.

If patient partners extend or deviate 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.

Accommodation

Accommodation may be necessary if a patient partner is required overnight and lives a significant distance away, or if there is an early start the following morning, where early or peak-time travel would severely limit their involvement.

Best practice is for UCLPartners to book and pay for accommodation in advance of the activity. This patient partners being ‘out of pocket’ while waiting for expenses to be reimbursed. Patient partners should contact UCLPartners to request this at least two weeks prior to the activity. There can be difficulties securing accommodation during peak times, so please give as much prior notice as possible.

If it is not possible for UCLPartners to book and pay for accommodation in advance of the activity, patient partners can be reimbursed for accommodation costs, providing the expected accommodation expenses have been pre-approved by UCLPartners as part of their pre-approval of expenses process.

Accommodation costs can be reimbursed as follows:

- The cheapest available accommodation that is sufficient for the network member’s needs, not exceeding hotel room costs (including breakfast) of up to £160 +VAT per night in London and £110 +VAT outside of London.

Subsistence

Meals, refreshments and snacks are generally provided at an event or meeting.

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

- Refreshments up to £5.00 (only if catering has not otherwise been provided and meeting/event runs for 2 hours or more)
- Lunch up to £7.00 (only if catering has not otherwise been provided and meeting/event runs between 12pm and 2pm, with patient partner >60mins away from home)
- Evening meal up to £15.00 (only if catering has not otherwise been provided and patient partner is returning home after 7:30pm)

UCLPartners has a duty to ensure appropriate use of public money and will presume the right to question any excess journey time. If a network member chooses to take a longer route or travelling method then UCLPartners cannot pay for meals if the journey is extended past the journey time that UCLPartners would expect. Please note alcoholic drinks will not be reimbursed.

Alternative carer costs

If a patient partner is a carer, getting involved may mean they would be separated from someone who normally depends on them to be there. UCLPartners can cover the cost of providing necessary alternative care whilst they are getting involved in pre-approved activities. Specific details will be required to ensure UCLPartners are able to support this fully.

UCLPartners may be able to pay these costs directly. This prevents patient partners being 'out of pocket' while waiting for expenses to be reimbursed. To request this, patient partners should contact the appropriate UCLPartners staff member at least two weeks prior to the activity to get this sorted.

Accompanying carer

If it is necessary for an informal, unpaid carer to accompany a patient partner who is participating in pre-approved involvement activities, the carer's expenses may also be reimbursed. Specific details will be required to ensure we are able to support fully.

UCLPartners can pay for some of the costs directly, for example travel and accommodation, where required. This prevents individuals being 'out of pocket' while waiting for expenses to be reimbursed. Where it is not possible for UCLPartners to book and pay for carer expenses in advance of the activity, these costs can be reimbursed providing the expected expenses have been pre-approved by UCLPartners as part of their preapproval of expenses process and in line with the rates and conditions outlined above. Please note that if a carer is travelling with a patient partner in the same car, no passenger mileage is payable for the carer unless this person is also actively involved in the involvement opportunity.

1.2 Ensuring equality and diversity (other costs)

To ensure involvement is accessible to all, UCLPartners will consider covering reasonable costs in addition to those shown above, which may include interpreters, signers for those with hearing difficulties etc. This should be agreed prior to the involvement activity / meeting and where possible these costs will be booked and paid for directly by UCLPartners, which will prevent network members being 'out of pocket' while waiting for costs to be reimbursed.

Network members with significant mobility challenges may claim for reasonable extra accommodation / travel / subsistence facilities to support them in pre-approved involvement activities (for example the need for help from a porter or hire of a hoist or other equipment to support accommodation). UCLPartners must be asked to agree these potential costs in writing as part of the pre-approval of expenses process, before a patient partner undertakes an involvement activity.

1.3 How will expenses be covered?

UCLPartners approves expenses in advance before patient partners take part in an involvement activity. This helps us to identify needs beforehand, to book and pay for expenses directly (for example train tickets and hotel accommodation), and agree upfront any other expenses which patient partners might claim reimbursement for.

UCLPartners will reimburse a patient partner where it has been essential for this individual to pay directly for travel / accommodation / subsistence for involvement activities, providing these expected expenses and direct reimbursement have been approved via pre-approval. In order for expenses to be reimbursed, a completed expenses claim form needs to be submitted to UCLPartners.

If it is the patient partner's first claim, the individual will also need to complete a bank details form. Expenses will be reimbursed through BACS with a remittance information being sent to the claimant by post / or emailed. A cheque can be sent if specifically requested. Network members who do not have a bank or building society account must ask to have expenses booked and paid for directly by UCLPartners.

1.4 When will expenses be reimbursed?

Expenses claim forms will be authorised by UCLPartners, once they have checked that they have previously agreed to the expected expenses as part of the pre-approval of expenses process.

Payment of the claim is then managed by the UCLPartners Finance Team who will endeavour to ensure payment within 4 weeks of receipt of the submitted claim form. UCLPartners recognises that this time scale may not be ideal for all patient partners and therefore encourages that expenses be booked and paid for directly by UCLPartners prior to the activity to prevent the need for reimbursement claims.

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 3 months following the event or activity which the claim relates to will not be authorised for payment.

UCLPartners will not authorise reimbursement for:

- any claims which are not in line with information within this guidance document;
- any claims submitted without receipts attached;
- any claims submitted more than 3 months following the event or activity which the claim relates to.

2. Recognition of time vouchers

UCLPartners offers recognition of time, expertise and skills vouchers, where appropriate and possible and for pre-approved involvement activities. UCLPartners will always make clear for patient partners what payment, if any, will be offered for specific involvement activities. Recognition of time vouchers are not offered for training activities.

The rate of for this recognition, to be paid in voucher(s), is usually offered as:

- Up to £100 for a half day, which is at least 3.5 hours, including travel time.
- Up to £200 for a full day, which is at least 7 hours, including travel time.

Patient partners may turn down the offer of payment if voluntary involvement is preferred.

2.1 How will payment for time be made?

Recognition of time vouchers will be authorised by UCLPartners, who will check that the patient partner participated in the involvement activity, and vouchers will be sent by post or emailed.

2.2 When will the payment for time be made?

Recognition of time vouchers that have been authorised by UCLPartners will be passed to the appropriate UCLPartners staff member who will make ensure the vouchers reach you within 4 weeks.

3. Contact details

As a patient partner, the first point of contact is the appropriate member of staff within UCLPartners who has contacted you regarding an involvement activity.

For further queries:

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