

**School of Primary, Community and Social Care  
Patient and Public Involvement and Engagement  
Reward and Recognition Policy**

**Summary**

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## Introduction

This policy applies to patients, carers and members of the public who are actively involved in research at the Research Institute for Primary Care Health Sciences as members of the Research User Group. This sets out our principles and is a guide to practice. It takes account of recently revised guidance from NIHR [INVOLVE](#).

## Recognition and reward: why is this important?

At the Research institute for Primary Care Health Sciences we value highly the involvement of patients, carers and members of the public. We recognise that people's time is valuable and we believe that nobody should be out of pocket as a result of their involvement.

**We are aware however that if you are receiving state benefits you must keep to the benefit conditions about undertaking paid activity. We strongly encourage people who are receiving state benefits to get advice from a trusted source of welfare benefits advice.**

## **Covering expenses**

Usually individuals are expected to pay for their own expenses (such as the cost of travel to get to the Centre) then they are reimbursed. Travel expense forms will be organised by the PPIE team. You will be given a monthly expense claim form to fill in at the beginning of the meeting. This will be used for all meetings that you attend during that monthly period.

**Paying expenses in advance:** In some circumstances, (such as when people are delivering presentations at conferences) we can book train travel for people and occasionally where necessary overnight accommodation).

## **Payment for time**

At their first meeting new members will be given £10.00 in Love to Shop vouchers.

For further meetings we offer payment in recognition of people's time. Rates are currently £75.00 for a half day meeting or pro rata. This payment covers preparation such as reading documents and attendance at the meeting and any follow up tasks that may arise from the meeting (up to one extra hours work outside of the meeting attended). For other work undertaken outside of meetings payment will be considered by the PPIE team on a case by case basis depending on the task and time taken. RUG members should discuss any additional time/ costs with the team for approval before submitting claims.

Not everyone will be eligible or will want to be paid, depending on their individual circumstances. In order to claim payment for time, individuals will require a University of Keele Casual Contract.

In order to receive a casual contract, you will have to provide proof of eligibility to work in the UK (preferably a passport, or a full birth certificate, and proof of a National Insurance No.)

Payment will be processed by the Payroll office and paid directly into individual bank accounts through an electronic transfer system (called BAC's)

You will be given a monthly payment form to fill in at the beginning of the meeting and this will then be used for all meetings that you attend during that monthly period.

Personal assistants and support workers: If you use a personal assistant (PA) or need a support worker to accompany you, their expenses and costs can also be covered. You will need to discuss any such arrangement in advance with the PPIE team. Then fill in the Personal Assistants and Support Workers form permitting us to pay them directly.

Carers: If you are a carer and will need reimbursing for the cost of providing alternative care whilst you are at the meeting, please discuss this with the PPIE team in advance and be prepared to provide evidence of the cost such as an invoice.

### **Non-financial support**

The PPIE team may accompany people to meetings where they are new to involvement. Where technical language (jargon) is used, the PPI team can supply a RUG Glossary and they may ask researchers to explain terms in lay language. For PPIE meetings held at Keele, Research User Group members will not be expected to pay for parking and as far as is reasonably possible, a parking space will be reserved for them in advance or a taxi booked.

### **Tax, National Insurance and benefits**

Guidance is available from NIHR [INVOLVE](#). Research users can request the Research Institute for a standard letter to take to Jobcentre Plus explaining the difference between involvement in research and the ability to carry out a paid job. **It is important to understand that where people are in receipt of state benefits and/or allowances, such benefits can be affected if payment is made.**

If your annual taxable income appears to exceed your tax threshold, you should contact your local HM Revenue and Customs office. They will advise you and may send you a tax return form if tax is due.

**You may still be liable to pay Tax and National Insurance on the fees you have received and therefore you will need to check your total annual taxable income at the end of the financial year (5<sup>th</sup> April)**

**You are required to notify HM Revenue and Customs local office of fees received only if your annual income exceeds your personal income tax allowance. You are responsible for calculating whether you need to pay any Tax or National Insurance**

### **Advice for people receiving state benefits**

If you are receiving state benefits you may want to get advice on benefit rules about payments. Different benefits have different rules and limits on the amount of money that you can accept before benefits are affected. It is your responsibility to check your entitlement to receive additional payments by contacting Jobcentre Plus.

If you need further assistance the PPI team at the Centre can put you in touch with a confidential involvement helpline run by specialists at Bedford Citizens Advice Bureau. specifically, for people who claim state benefits and are already involved as research users or who are considering becoming involved in NIHR funded projects.

**If you are receiving state benefits you should check if any of the state benefits you receive are taxable and may count towards the annual taxable income.**

### **Further sources of information**

For those without easy access to the internet, the Patient and Public Involvement Coordinator can supply copies of these documents.

#### **Citizens Advice Bureaux (CAB)**

Use [www.citizensadvice.org.uk/index.htm](http://www.citizensadvice.org.uk/index.htm) to find your local CAB and for other useful information.

Information about dealing with **HMRC (HM Revenue and Customs)** and the details of local offices are available on the [Direct.gov.uk](http://Direct.gov.uk) website

**HMRC information about the need to complete a tax return** is available from: [www.hmrc.gov.uk/sa/need-tax-return.htm](http://www.hmrc.gov.uk/sa/need-tax-return.htm)

Department for Work and Pensions' guidance is also available on their website:  
[www.gov.uk/dwp](http://www.gov.uk/dwp)

### **Jargon Buster.**

**Fee:** Payment received for the contribution of time, expertise and skills.

**Earnings:** Total of what you have received in payments for contributing your time and experience

**Income:** Total amount of money you receive from all sources.

**Out of pocket expenses / expenditure:** This refers to expenditure that is required to enable you to take part in an activity.

**Personal income tax allowance:** This is the amount of income you can receive in a financial year before tax will start to be deducted. The amount will be affected by your personal circumstances, such as age.

**Reimburse / reimbursement:** Money that is given back to you because you spent it in order to take part in an activity. For example, paying back your travel fares for going to a meeting.

**State benefits (or welfare benefits):** Payments made by the government to support people who have ill - health or a disability that limits their capacity to work, or people who are unemployed and looking for work, or people who are caring for another person. The conditions vary for different types of benefits.

**Taxable benefits:** Some benefits are subject to tax, others are not. When you have received money that has not already been taxed by an organisation, you will need to complete a tax return form (sometimes called a self-assessment form). It is often used by people who are self-employed.

If you receive a salary this is usually taxed, but if you have earnings, for example from consultations you have been involved in over the year, this may have to be declared to the tax office using this type of form.