

## Patient and Public Involvement (PPI)- Payments and Expenses policy and procedures

### Background

The PSSRU is one of the leading social care research groups, not just in the UK, but internationally. The PSSRU's mission is to conduct high quality research on social and health care to inform and influence policy, practice and theory. Patient and Public Involvement is very important to producing high quality research at PSSRU.

Members of the public will undertake involvement activities as Lay Research Advisors. They may be working on grant proposals prior to submission to funding bodies or on funded projects. In addition, PSSRU are involved in delivering the work of the Quality, Safety and Outcomes Policy Research Unit (QSO PRU). Research Advisors may become involved in a research project connected to this PRU, working with colleagues at the University of Kent, University of Oxford, London School of Hygiene and Tropical Medicine, Picker Institute and University of Hull Medical School. If that is the case the PSSRU Patient and Public Involvement Payment Policy will apply.

The team you will be working with will meet with you and discuss your role and the involvement activities they are inviting you to undertake and will let you know who is funding the project.

### What is the purpose of this policy?

This document sets out PSSRU's policy and procedures in relation to payment for members of the public's involvement in research. It is good practice to have a payment and expenses policy-

1. To ensure Lay Research Advisors know what activities they are being invited to be involved in and what fee is payable for this work. This helps advisors to make a decision about taking part in advance.
2. To ensure research funding is managed efficiently.
3. To meet with the Standards for Involvement set out by INVOLVE.

*If you are unsure what any of the terminology or words used in this policy mean, we have provided a glossary at the end of the document.*

### What to do if you have a problem or need support:

If you have any questions or queries about involvement activities, fees or expenses please contact Sarah Birch, Public Involvement and Engagement Manager- E mail [s.j.birch@kent.ac.uk](mailto:s.j.birch@kent.ac.uk) | Telephone: 01227 824967 (Flexible working, with predominant working days Tuesdays, Wednesdays, Fridays).

## What will Lay Research Advisors be paid?

We will offer you a fee for undertaking specific activities; this is a payment in recognition and reward for your contribution to the research. This does not constitute a contract of employment with PSSRU or the University of Kent.

Involvement activities carry the following fees-

**£150** for a full day (e.g. attending a meeting that is to last longer than half a day or requires substantial preparation and/or travel time, attending a full day event).

**£75** for half a day (e.g. attending a morning or afternoon meeting of up to 2 hours that includes some preparation and/or travel time, a rapid review of a grant application).

**£50** for involvement in a task or activity requiring some preparation of about two hours of time (e.g. sending comments on a document, followed by a short call to discuss).

**£25** for a shorter task or meeting that does not require preparation (e.g. a brief teleconference/online meeting of about 1 hour, a review of a short document such as a Plain English Summary review).

You are not obliged to accept any offer of payment and if you prefer not to or to receive a lower amount then you can discuss this with Sarah (Public Involvement and Engagement Manager).

*If you are unsure about the fee you may claim, please ask before you undertake any work.*

## Expenses-

All reasonable expenses that arise from involvement research will be reimbursed, including: travel, food and drink, accommodation, childcare, carer costs, personal assistant costs, training and conference fees.

Expenses may be **paid directly** (for example, by purchasing travel tickets or travel cards ahead of your journey, by booking and paying for hotel accommodation in advance, or by paying an alternative carer or personal assistant directly). To pay directly in this way we would ask that you give us advance notice, ideally at least two weeks where possible. Requests for such arrangements should be made via Sarah.

We can also **reimburse** you for out of pocket expenditure that you have already incurred (for example, by your claiming back money that you have paid out because of involvement in research). If you wish to have your expenses reimbursed you will also need to provide original receipts for everything that you have paid for and send these in with your invoice or claim form (see below).

Please note, NIHR recommend a minimum £5 remote/home working costs per meeting for public advisors requiring the use of home office supplies for their involvement. The home-

working expense can be budgeted into projects costed from November 2022 onwards. If you are working on projects that have been costed prior to November 2022 and you would like to discuss the home working payment, please talk to your researcher.

(NIHR Centre for Engagement and Dissemination's Payment [Policy](#), updated NIHR 2022 guidance regarding remote working).

## **Minimum of £5 per meeting - Remote/ home working costs**

Some public contributors will make use of home office supplies as part of their involvement. 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. For example, NIHR offers £5 per meeting to cover the cost of telephone calls, paper, printing ink and paper, internet connection and other home sundries. More than £5 can be offered to public contributors to support their active engagement from home; discuss home-working access needs with public contributors.

*[If you are unsure about the expenses you may claim, please ask before paying for anything.](#)*

## **Procedures for Researchers and Lay Research Advisors**

### **Data Protection-**

All details provided to PSSRU and the University of Kent to manage payments and expense reimbursement will be managed in line with Data Protection requirements.

*[Prior to involving you we will-](#)*

- Send you a role description, which will outline the nature of the involvement opportunity and associated activities.
- Each activity will be allocated a fee.
- You will have the opportunity to meet with Sarah and/or a researcher to discuss the activities, fees and agree what you are comfortable being involved in.
- A final copy of the role description will be sent to you via e-mail after the meeting and we will ask that you confirm by reply that you are satisfied with the activities you will be undertaking and the associated fees.

*[We value people's time and so if you feel more time is needed to complete an activity then you should contact Sarah and/or the researcher to discuss this before undertaking the work.](#)*

## *When you are ready to submit a claim-*

You can submit a claim for your involvement and expenses by either-

### *Submitting an invoice*

Information to include- your name, address, bank details, dates of the work undertaken, a description of the tasks completed, details of any out-of-pocket expenses (please include receipts), the fee you are claiming, the name of the project (and project code if known), name of the researcher.

### *Submitting a claim form*

We have template claim forms you can submit, please ask Sarah for a form. Please include receipts for out-of-pocket expenses. We recommend that you fill out as many details as possible to create and save a template, changing only the details of your claim each time. We are unable to add individual details such as bank details to claims, as we do not keep these details within PSSRU. If you need any other support with your form please let Sarah know.

*Please submit the invoice or claims form as a Word document. Upon receipt the Researcher or Finance office will password protect the document.*

Invoices/claims forms can be attached to an e mail and sent to-

- a) The researcher you have been working with, and
- b) Sarah Birch

*Please ask for a printed copy and reply paid envelope if you are unable to submit a claim electronically.*

## *Once your claim has been submitted-*

- Sarah/the researcher will confirm your involvement, fees and expenses and send the claim to the University of Kent's Divisional Finance Team at the earliest opportunity.
- The University of Kent's Research and Innovation Accounts Team and the Payments Office will also have sight of your invoices and claims form in order to process these.
- It is also possible that funding auditors may ask to see this form.
- Please note there are no cut-off dates for submitting an invoice/claim.
  
- You can expect payment within 4-6 weeks.

- Fees and expenses are paid by electronic transfer directly into your bank account (this is called a BACS payment).

## **Information about Tax, National Insurance, other liabilities and benefits**

Lay Research Advisors are treated as self-employed, which means that the University of Kent will not deduct tax or National Insurance (NI). Therefore, if you are aware that tax and NI should be deducted (this will depend on your personal circumstances) this would need to be done through the HMRC self-assessment process (information and guidance is available here: <https://www.gov.uk/self-assessment-tax-returns>). Please be aware that other liabilities may be due that would fall under 'miscellaneous tax' as opposed to self-assessment tax.

Finally, PSSRU recognizes that payment for public involvement may jeopardize receipt of benefits or create legal problems where lay people are in receipt of means-tested benefits. We are unable to provide advice on tax or benefits issues. NIHR INVOLVE have a benefits advice service for people involved in NIHR funded research. To access the service you will need to-

- contact INVOLVE in the first instance [involve@nihr.ac.uk](mailto:involve@nihr.ac.uk) /phone 02380 595628.
- Tell them the name of the NIHR programme funding the research project you are involved with (please ask Sarah or your researcher contact for these details).

More information about the benefits advice service is available here:

<https://www.invo.org.uk/benefits-advice-service-for-involvement-for-members-of-the-public/>

## Glossary-

**BACS-** Bankers' Automated Clearing System, an automated payment method where money is transferred from one bank account to another.

**Centre for Engagement and Dissemination-** a part of the National Institute for Health Research. The Centre brings together work on patient and public involvement, engagement, participation, and research dissemination. It replaces INVOLVE.

**INVOLVE-** part of NIHR, INVOLVE was a national advisory group which supported greater public involvement in NHS, public health and social care research. The INVOLVE website is currently still active and has useful resources for Lay Research Advisors and Researchers. INVOLVE have now been replaced by the Centre for Engagement and Dissemination, but at the time of writing their resources remain on the INVOLVE website.

**Lay Research Advisor-** At PSSRU members of the Public who contribute to and work with us on research are referred to as Lay Research Advisors, or sometimes just Research Advisors. Other organisations may use different titles such as public contributors.

**PSSRU-** The Personal Social Services Research Unit is a department within the University of Kent undertaking research in the area of social care.

**QSO PRU-** The Quality, Safety and Outcomes (QSO) Policy Research Unit (PRU) is one of 15 Policy Research Units funded by the National Institute for Health Research (NIHR). The PRU is made up of researchers from PSSRU at the University of Kent, The University of Oxford, London School of Hygiene and Tropical Medicine, Hull Medical School and Picker Institute.

Sarah coordinates public involvement in the PRU and payments are managed by PSSRU following this policy. You can find more information about QSO here: <https://www.qso.ac.uk/>

**Rapid review-** Some Research Advisors sign up to be contacted to review documents or grant applications where a quicker than usual response is required. Advisors doing rapid review work agree to provide feedback on documents within 5 days.

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