

**National Institute for Health Research (NIHR) Oxford Health Biomedical
Research Centre (BRC) and cognitive health Clinical Research Facility (CRF)**

**Patient and Public Involvement (PPI) in Research
Payment Policy**

Guidance for patients and members of the public

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Introduction

If you are a patient, carer or member of the public working with the NIHR Oxford Health BRC and/or cognitive health CRF on the design and planning of research or in a strategic advisory role, you are entitled to receive payment for your time. Not all who are offered payment choose to accept it, but this document sets out what is available, what you need to do to receive payment and how to proceed if you are on state benefits.

1. What are the principles of payment?

This document describes how we will pay for your time working with us, and how much we will offer to pay.

This is distinct from reimbursing expenses such as travel costs, which we will always do or, where possible, paid in advance on your behalf, by - for example - booking train tickets or a hotel if you need overnight accommodation. Where public contributors participate in meetings remotely from their home, we will pay a standing allowance of £5 per meeting to cover the cost of telephone calls, paper, printing ink and paper, internet connection and other home sundries. Subject to agreement, we may also reimburse other significant costs of home-working such as printing large documents or making telephone calls.

Offering payment for your time recognises the contribution that you make to our work. It does not mean that you have a contract of employment with us. The rates in this document are a guide (see section 4 below), and details will be agreed, alongside the work plan, with the theme or working group with which you are involved (see "Who to contact", below).

Please ask in advance if you might need help with childcare costs to enable you to work with us, costs for a carer to come with you to meetings or to provide respite care at home. If you have to travel far for meetings, we will consider paying for time taken to travel; please also ask us about this in advance. We will not normally pay for time taken for training that is aimed at enabling you to carry out your work with us.

2. Am I eligible for payment?

If you do not have a full-time public-sector salary you are eligible to receive payment from us. If you do work full time in the public sector we are able to pay you if your job is unrelated to the task(s) you do for us and you do them in your free time.

3. How will I be paid?

As noted above, travel and other expenses will be paid where possible on your behalf, in advance. If you have bought tickets etc. yourself, we will reimburse you as soon as possible after we receive the original receipts and a signed claim form from you (which we will provide). You will have the opportunity to receive reimbursement by bank transfer (BACS) or cheque, with the possibility to receive in cash according to individual circumstances.

Receiving payment for your time is based on three simple steps:

1. Agreeing with us in advance what you will be paid, based on rates below (see section 4);
2. Agreeing which arrangements can be made and paid by us on your behalf in advance (e.g. travel to a meeting);
3. Filling in a form that will be provided to you by your named contact, signing and returning it to the person who sent it to you, with original receipts for expenses if you have any.

Please note that, as the Oxford Health BRC and Oxford cognitive health CRF are both partnerships of the University of Oxford and Oxford Health NHS Foundation Trust, either of these organisations may be responsible for paying you. This means that you may be provided with different forms depending on where the money is held for the project that you will be paid from.

It may take a few weeks for you to receive payment – again, this depends on which organisation is paying you, and how long it takes for the claim forms to move through the internal processes. Your personal details will be seen by the staff members involved with your claim, as well as budget holders, and financial administrators. Your forms will be held securely on either University or Trust servers. Your details will not be used for any other purpose than to pay you, and you will need to complete a new form each time you make a claim.

4. How much will I be paid?

Our rates are based on those of other similar organisations and are a guide. Payment will be agreed with you before work is done, in part as there will be times when the activity does not fit the categories below.

Payment rate guide

- Full day meetings: £150 - to include all preparation and follow-up
- Half day meetings: £75 – to include all preparation and follow-up
- All day meetings where you are the chair or have considerable preparation and/or follow-up: £225

- Half day as above: £110
- Meetings or other work totalling approx 2-3 hours: £50
- Short pieces of work which require little preparation or follow-up, such as a telephone meeting or reviewing short documents; approx 1-2 hours: £20.00

We may also invite you to get involved with reviewing/commenting on documents, research plans etc. via email or post. Approximate rates for this are:

- Reviewing short documents, up to approx 50 pages: £50
- Reviewing for example grant applications/mid-length reports (~50-100 pages): £150
- Reviewing large reports/documents, (over 200 pages): £200.

5. Do I have to pay tax and National Insurance on any payment I receive?

If you do accept payment of a fee, this is treated as part of your overall income and you are personally responsible for any income tax or National Insurance contribution liability. We do not deduct tax or National Insurance contributions from payments. There is some information here:

<http://www.invo.org.uk/payment-resources/tax-and-national-insurance/>

In October 2017, INVOLVE issued an update regarding IR35 Regulations and their applicability to PPI – you can see this here: <http://www.invo.org.uk/wp-content/uploads/2017/10/INVOLVE-statement-on-HMRC-IR35-regulations.pdf>

6. Can I receive payment if I am on benefits or have a pension?

You can always accept reimbursement of expenses, but receipt of payment is a very complex area if you are on state benefits of any kind and/or a state pension. We urge you to take specialist advice before agreeing to accept payment. There is a free national confidential service designed specifically to help patients and members of the public in this situation, provided by the Bedford Citizens Advice Bureau. Please see details here:

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

Alternatively, you can start by contacting INVOLVE by email on involve@nihr.ac.uk or phone 02380 595628. Tell them the name of the NIHR organisation you are involved with (either NIHR Oxford Health BRC or NIHR Oxford cognitive health CRF). They do not need to know anything about your benefit situation. They will give you an email address (or telephone number) so that you can contact the Benefits Advice Service directly. They will also give you a code. Please give this code to the service when you contact them.

It is important to tell the Benefits Advice Service about all forms of PPI payment that you may have been offered, if you are being paid for involvement by other organisations in addition to ours.

7. Who to contact

Different pieces of involvement work will be initiated by, and paid from, different people/departments. The contact person in each case may be different and should always be given. If there is not a named contact given, please check with the person who approached you in the first place.

General queries about this policy can be addressed to the PPI Manager at the BRC/CRF claire.murray@oxfordhealth.nhs.uk .