

NIHR Oxford BRC Patient and Public Involvement (PPI) in Research
Working Group: Patients Active in Research (PAIR)
Payment Policy

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Introduction

As a member of PAIR, or a non-member who has agreed to do a specific piece of work with us, you are entitled to payment for your time.

Not all patients 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 and wish to accept payment.

1. What are the principles of payment?

This document sets out how we will pay for your time working with us in the design and planning of research or in strategic advisory roles, 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, pay for you in advance, for example, booking train tickets or a hotel if you need overnight accommodation. Subject to

agreement we may also reimburse significant costs of home-working such as printing large documents or making telephone calls.

In addition to covering or refunding expenses as above, we offer payment for your time. This is to recognise 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, and details will be agreed, alongside the work plan, with the Director of Patient Involvement, Sophie Petit-Zeman, or her team.

Please ask us 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 (see Who to contact, below) 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). Sandra Regan, see below, will manage this process for you.

If you have accepted an offer of payment for your time, both this and any expenses if you have them must be submitted on the same form (NEP01 - see appendix A).

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

1. Agreeing with us in advance what you will be paid, based on rates below
2. Filling in the NEP01 form (appendix A), signing and returning it to Sandra Regan, see below, with original receipts for expenses if you have any. Our finance department will usually process this within 4-6 weeks depending at what stage in the month it is submitted.

4. How much will I be paid?

Our rates are based on those of other similar organisations. The rates below 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 (such as teleconferencing).

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 eg 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?

You will be paid via the payroll of OUH NHS Trust which will normally deduct income tax and National Insurance (NI) at source (just like "PAYE") even though you will not have a contract of employment with us. You will be asked to fill in a form (NEP01; appendix A) where both reimbursement of any expenses and payment for your time will be detailed.

If you are self-employed, you can fill in an additional form (see Appendix B), return it with the NEP01 and the Trust will make no deductions and you will be liable for all declarations of earnings.

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: www.invo.org.uk/resource-centre/benefits-advice-service/

It is important to tell them 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.

Because our payments are made "PAYE," an alert may be sent to the benefits authorities when you join the payroll to the effect that you have "started paid employment". As this could result in benefits being stopped, it is essential to take advice from the service above about how to notify the relevant benefits

authorities in advance that you are signing up to PAYE for intermittent paid involvement.

7. Who to contact

Sandra Regan from the Patient Involvement Working Group handles all practical aspects of payment, receipt of claim forms, liaison with finance team etc. Advance agreement of what payment is being offered will be made with Sandra and/or the Director of Patient Involvement, Sophie Petit-Zeman. Sandra can be reached at:

Tel: (01865) 223298 | **E-mail:** sandra.regan@ouh.nhs.uk |

Appendix A

Form NEP01 – Non-Employee Payment Form

All sections of this form must be completed in order for it to be processed.
Please return it to Sandra.regan@ouh.nhs.uk

Personal Details	
Title:	
Forename(s):	
Surname:	
Date of Birth:	
National Insurance Number:	
Home Address:	
Postcode:	
Bank Details	
Bank Name	
Account Name	
Account Number:	
Sort Code:	
Claim Details	
Details of Claim:	
Total Amount:	
Authorisation	
Claimant Signature:	
Office Use Only	
Cost Centre:	
Subjective:	
Confirmation of Total Amount:	
Approved By:	
Authorised Signature:	
Finance Manager Signature:	
HRR Processed By & Date:	

Appendix B

OXFORD UNIVERSITY HOSPITALS NHS TRUST

INLAND REVENUE AND DEPARTMENT FOR WORK AND PENSIONS QUESTIONNAIRE

FOR THE DETERMINATION OF SELF-EMPLOYMENT STATUS

Details of Individual

Full Name:

Address:

Telephone Number: _____

National Insurance No.

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If you are registered self-employed with the Inland Revenue please complete Section A and Section B. If you have not registered with the Inland Revenue please complete Section B.

Section A

Unique Tax Reference Number:

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Name, address and reference number of respective tax office:

Section B

Details of services provided to the Oxford University Hospitals NHS Trust:

- 1. Was there an agreement in writing? (circle as appropriate)
 - A). Contract of Employment Yes/No
 - b). Letter Yes/No

If "Yes" please give details:

- 2. Was there any agreement to pay for sick/annual leave periods? (Circle as appropriate) Yes/No

If "Yes" please give details:

- 3. Is this your sole employment? (Circle as appropriate) Yes/No

Please give details:

- 4. Did you use your own equipment? (Circle as appropriate) Yes/No

Please give details:

Method of payment: (circle as appropriate) a fixed amount on completion
A rate per day/our/week/month

Any other, e.g. Expenses, please give details:

N.B. ALL QUESTIONS MUST BE ANSWERED FOR THE INLAND REVENUE AND DEPARTMENT FOR WORK AND PENSIONS IN ORDER TO DETERMINE STATUS.

Signed _____

Date _____

N.B. IT IS THE POLICY OF THE OXFORD UNIVERSITY HOSPITALS NHS TRUST TO REFER ALL PAYMENTS NOT SUPPORTED BY A UNIQUE TAX REFERENCE NUMBER, TO UHB PAYROLL SERVICES FOR PAYMENT, AFTER DEDUCTION OF INCOME TAX.