# **Public Contributor Guidance: Payment Methods for Your Patient and Public Involvement and Engagement (PPIE)**

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6. **Introduction**

**Patient and Public Involvement and Engagement (PPIE)** in research/teaching and research participation/volunteering plays an essential role in the Faculty’s work.

Members of the public involved in our research/teaching in this way are commonly referred to as **Public Contributors**. It is essential that as a Public Contributor you are recognised for your involvement and participation.

As a Public Contributor, you are not an employee of The University of Manchester and neither party (yourself or the University) intends any employment relationship to be created now or at any time in the future.

**Please note:** some Public Contributor roles won’t receive payment for their time or travel costs. This is due to payments being dependent on the grant or budget available. To find out more please ask your University contact before starting your Public Contributor role.

**For example:** involvement in a research project prior to the grant application being successful in obtaining funding often involves voluntary involvement without payment for time.

1. **Purpose**

This document provides you with information regarding payment for your volunteer Public Contributor role and is to be used in conjunction with the [template appointment letter](http://documents.manchester.ac.uk/display.aspx?DocID=46393) and [Being a Public Contributor Induction Guide](http://documents.manchester.ac.uk/display.aspx?DocID=41420).

Public Contributor activities include (more examples can be found in 3a/b):

1. Involvement in research and teaching: where you are actively involved e.g. being part of a research user group or sharing your patient experiences with our students
2. Attending public engagement events/conferences on behalf of the University.
3. **Patient and Public Involvement and Engagement (PPIE) Roles Examples**
   1. **Research**
4. Overseeing research as a member of a Steering Committee/Scientific Advisory Board
5. Being part of a Research User Group/Patient Advisory Group
6. Being asked to review grant proposals/research methodologies
7. Consulting and giving advice on grant proposals
8. Advising on research documentation (e.g. participant information sheets, consent forms, advertising and recruitment materials)
9. Being an active partner in research (a ‘co-researcher’/‘co-applicant’)
10. Being involved in data analysis
11. Acting as a facilitator or chairing a meeting
    1. **Teaching and Learning**
12. Sharing your experiences with students (e.g. as a patient, carer or parent)
13. Advising on course content and learning materials from a patient perspective
14. Sharing your stories and experiences with learners in the classroom including professionals/in-service training
15. As simulated and/or volunteer patients involved in assessment and feeding back to tutors and students
16. Leading lectures or co-producing lectures
17. Peer reviewing academic lectures
18. As teachers/assessors/evaluators of student clinical skills and/or communication skills
19. As equal partners in student education, assessment and curriculum development (e.g. patient educators collaborate in setting curriculum objectives, assessment criteria)

Your role as a Public Contributor can determine how you are paid (i.e. whether you are considered to be a casual worker). For example, being part of a **research user group** or **sharing your experience** with our students wouldn’t make you a casual worker. For this you would be compensated for your time through cash/vouchers or a BACS payment (directly into your bank account).

If you were a **co-researcher** however you would be paid as a casual worker (via University payroll), no other conditions of employment are associated with a casual worker role. You will need to complete a [PR18](http://documents.manchester.ac.uk/display.aspx?DocID=29642) to be paid this way.

Generally, the PPIE examples above in 3a (1-5) and 3b (1-3) would be paid with cash/BACS payment whilst 3a (6-7) and 3b (4-8) would be paid as a casual worker.

1. **Frequently Asked Questions.**
2. **Where Does the Money to Pay Public Contributors Come From?**

* Some research funding bodies will provide funds for involvement
* Some funders offer specific bursaries for involvement at the proposal development stage (e.g. [National Institute for Health Research (NIHR) Research Design Service](http://www.rds-nw.nihr.ac.uk/public-involvement/fund/))
* Other funders accept costs for involvement activities as part of an overall grant application (e.g. NIHR schemes)
* Research funders (e.g. [The Wellcome Trust](http://www.wellcome.ac.uk/Funding/Public-%20engagement/))) and charities offer grants
* Some research grants will include allocations for reimbursing participants for their time and providing out of pocket expenses, depending on the funding body.
* The University of Manchester internal budgets

1. **How Much Can I be Paid for Involvement, and Are My Payments Subject to Tax and National Insurance?**

**Please note:** There is a difference between being **paid your expenses** (travel and subsistence e.g. food and other related costs) and being **compensated for your expertise, time and effort**. Your University staff contact should discuss the amount you will be paid/compensated before you start your PPIE, this should be followed up in writing. See **Section E** for examples of payment types.

Where you are invited to attend meetings to give your views on various matters which then informs the research/teaching process and direction, HMRC agrees that the amounts you are paid/compensated is unlikely to fall within the definition of ‘earnings’ for PAYE (pay as you earn) or NI (National Insurance) purposes.

No employment relationship exists with the University so you would not be required to pay tax or NI if the sums you receive only pay/compensate you for reasonable costs (including travel and subsistence).

Should your pay exceed those reasonable expenses, then anything extra that you are paid may be classed as Miscellaneous Income. This means you may have to pay tax on these earnings.

**Please note: It is your responsibility to notify Inland Revenue under self -assessment.**

If you have any queries regarding this visit: [www.gov.uk/government/organisations/hm-revenue-customs](http://www.gov.uk/government/organisations/hm-revenue-customs)

***As a guide, the Faculty would consider up to a total of £1500 per University financial year (1st August to 31st July) (excluding travel and subsistence) as reasonable*.** ***If you expect payments to exceed this amount, please consult with your staff contact.***

For involvement where you are invited to act as a co-applicant research partner or active teaching partner, then you would be paid as casual worker (subject to PAYE and NI) through a [PR18 form](http://documents.manchester.ac.uk/display.aspx?DocID=29642).

**If you receive benefits** there may be a set amount that you can earn in addition to your benefits. It is **your responsibility** to check this before you agree to be a Public Contributor.

For health research involvement, volunteers may also seek advice from the NIHR Centre for Engagement and Dissemination benefits advice service. Contact: [ced@nihr.ac.uk](mailto:ced@nihr.ac.uk) or call 020 88437117. Further details can also be found [here](https://www.nihr.ac.uk/documents/payment-guidance-for-researchers-and-professionals/27392#Step_4:_How_much_will_it_cost?)

Click on Welfare benefits (6) in the contents section of [NIHR Centre for Engagement and Dissemination guide on Payment for Involvement](https://www.nihr.ac.uk/documents/payment-guidance-for-researchers-and-professionals/27392#Step_4:_How_much_will_it_cost?) for further guidance.

* 1. **Will I Get Paid Expenses (e.g. travel, accommodation etc.)?**

In the majority of cases you should be able to claim back any travel expenses incurred but this will depend on the budget available. Again your University staff contact should inform you of this before your Public Contributor role begins and if there is a limit to how much you can claim up to. If you are unsure please ask your staff contact.

* If you are able to claim travel expenses, the University has a travel policy which details how much you can claim for mileage. For further information click [here](http://documents.manchester.ac.uk/display.aspx?DocID=38313)
* If you require training for your role then this cost should also be covered.

You should receive your reimbursement ideally as a cash payment on the day or through a BACS payment. Since March 2020 the majority of payments will be reimbursed via a BACS payment straight into your bank account.

**Online Meetings:**

Public Contributors can also receive £5 contribution towards remote working costs (including telephone or internet) in lieu of travel costs while working remotely. This is based on [NIHR Centre for Engagement and Dissemination recognition payments for Public Contributors](https://www.nihr.ac.uk/documents/centre-for-engagement-and-dissemination-recognition-payments-for-public-contributors/24979) guide.

* 1. **Working Across Institutions**

When working across different host organisations (e.g. University, NHS Trust, etc) or research organisations (e.g. the NIHR research networks), you might need to comply with their involvement requirements. Useful guidance can be found [here](http://www.tmn.ac.uk/resource/collection/D80ACB4B-2D30-4A0C-919A-2A01461D3AD7/Model_payment_policy_for_MHRN_Hubs%5b1%5d.pdf).

1. **How Will I Be Paid?**

The Faculty has a range of ways to pay Public Contributors:

**C1.1. PR20 Form Payment (BACS payment)**

The University’s preferred option is through a payment form called [PR20 form](http://documents.manchester.ac.uk/display.aspx?DocID=39693) which is made by BACS payment directly into your bank account - both out of pocket expenses and payment for your time can be recorded on this form. PR20 forms can also be used to pay a volunteer who is also a member of staff. Tax will not be deducted when you are paid through this route.

When completed please send your form to your University staff contact for approval with any receipts. They will then arrange for the form to be authorised and before sending to HR Services where the BACs payment will be arranged. The form can also be emailed.

All staff will adhere to [Data Protection Act 2018, the General Data Protection Regulation 2018 and the University Data Governance policy](http://documents.manchester.ac.uk/display.aspx?DocID=14914) at all times when processing your personal information and have completed the University’s mandatory Data Protection Training.

**Please note:** it usually takes 4-6 weeks for your form to be processed and for your payment to appear in your account. You will not receive a remittance note.

**C1.2. Cash on the Day**

Cash is the Faculty’s preferred option if you attending a meeting on the University campus. You will be required to fill out a form and submit any receipts that you may have. Digital copies can be taken but the original receipt is preferred.

**C1.3. Gift Vouchers**

Gift vouchers can be used as an alternative form of payment. Love 2 shop, amazon and Blackwell’s vouchers are available (e-voucher is preferred). Gift vouchers will now be processed via the University’s Finance department which means that your details (e.g.) email address will need to be shared with them.

Your email address will be securely retained by Finance for a period of up to 7 years for audit purposes only and then destroyed. It will not be used by them for any other purpose. If you are concerned about this, please speak to your staff contact.

1. **Useful Contacts**

**D1. University**

If your query relates to a practical payment issue (e.g. you haven’t received your payment) please contact your University staff contact in the first instance.

If your query relates to a more substantive issue concerning your involvement/volunteering/participation please contact the Faculty’s Social Responsibility and Public Engagement Team: [srbmh@manchester.ac.uk](mailto:srbmh@manchester.ac.uk)

**D2. Other Useful Contacts**

* + [NIHR Research Design Service (RDS) North West](http://www.rds-nw.nihr.ac.uk/public-involvement/fund/)
  + [NIHR Clinical Research Network (CRN)](http://www.crn.nihr.ac.uk)
  + NIHR Centre for Engagement and Dissemination [Payment for Involvement Guide](https://www.nihr.ac.uk/documents/payment-guidance-for-researchers-and-professionals/27392)

1. **Payment Examples**

**Please note:** Some Public Contributor roles won’t receive any payment for time or travel costs as the payment provided is dependent on the grant or budget available. To find out more please ask your University contact before engaging in a Public Contributor role.

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| --- | --- | --- | --- |
| **Activity** | **Contribution** | **Frequency** | **Payment Amount and Type** |
| E.1. Teaching and Learning | Medical Education Partners (MEP): Various, including supporting medical student education (student admissions, health and conduct panels, expert patients) and curriculum development | Regular | £60, payment made three times per year, unless circumstances justify more regular payment  Paid through payroll (casual staff: PR18 form) |
| E.2. PPIE Forum Public Contributor | Advising Faculty on PPIE | 4 meetings per  year (2 hours each) plus reading papers in advance | £60 per meeting plus travel expenses/£5 contribution for internet costs  Paid in cash (via cash advance) or PR20 |
| E.3. NIHR research project | Co-applicant and Service User Research Assistant (SUR): conducting data collection and analysis | Two months on a  0.5 WTE contract | £14.16 per hour  Paid through payroll (casual staff: PR18 form) |
| E.4. PPI training | Bringing experience to PPI learning groups | As required | £150 for 4 hours plus travel (maximum £25). Paid through PR20 form |

Please note: Payment amounts detailed above are accurate at the time of writing. If this has changed please contact [srbmh@manchester.ac.uk](mailto:srbmh@manchester.ac.uk)

Public Contributors can also receive £5 contribution towards remote working costs including telephone or internet costs in lieu of travel costs while working remotely. This is based on [NIHR Centre for Engagement and Dissemination recognition payments for Public Contributors](https://www.nihr.ac.uk/documents/centre-for-engagement-and-dissemination-recognition-payments-for-public-contributors/24979) guide.

1. **Contacts and Further Information:**

If you have any queries about the payment for your volunteer Public Contributor role please contact your University contact in the first instance.

Any queries regarding this guidance document please contact [srbmh@manchester.ac.uk](mailto:srbmh@manchester.ac.uk)

**Further Information About PPIE Within the Faculty:**

* For information, templates and resources to support you with your PPIE either as a member of staff, student or Public Contributor visit the [Faculty’s PPIE toolkit](http://www.staffnet.manchester.ac.uk/bmh/social-responsibility/public-and-patient-engagement/ppie-toolkit/)
* Follow the Social Responsibility and Public Engagement Team on Twitter: [@FBMH\_SR](https://twitter.com/FBMH_SR)
* For PPIE advice and guidance email: [srbmh@manchester.ac.uk](mailto:srbmh@manchester.ac.uk)
* Sign up to receive the Faculty’s monthly [Public Engagement email newsletter](http://www.bmh.manchester.ac.uk/connect/social-responsibility/contact/)