

Policy Type		Policy Name
Information Governance		CO31: Expense reimbursement policy for patient, carer and public involvement in engagement activity
Corporate	X	
Standard Operating Procedure		
Human Resources		

Status	Final
Committee approved by	Executive Committee
Date Approved	19 December 2017
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Document History

Version	Date	Significant Changes
1	28/02/2013	<ul style="list-style-type: none"> • First Issue
1 Extension	November 2017	<ul style="list-style-type: none"> • Policy reviewed and extended review date agreed.

POLICY VALIDITY STATEMENT

This policy is due for review on the latest date shown above. After this date, policy and process documents may become invalid.

Policy users should ensure that they are consulting the currently valid version of the documentation.

Approval

Role	Name	Date
Approval (1)	Executive Committee	March 2013
Approval (1 Extension)	Executive Committee	19 th December 2017

Review

This policy is due for review on the latest date shown above. After this date, policy and process documents may become invalid.

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1. Introduction

North Durham Clinical Commissioning Group (CCG) / Durham Dales, Easington and Sedgefield Clinical Commissioning Group (CCG) is committed to proactively seeking and building continuous and meaningful engagement with patients and carers, as well as with the wider public, to shape services and improve health. The CCG's Engagement Strategy sets out the plan to involve patients and the public in all areas of work to ensure decisions are based on local needs and priorities.

Many individuals already give up their time and provide the CCG with energy, enthusiasm and expertise through a range of different engagement forums and mechanisms. This policy sets out the principles and practice for the **reimbursement of out of pocket expenses for such individuals**, thus removing potential barriers to engagement and involvement to ensure local people have a voice in the business of the CCG.

This policy sets out the responsibilities for all CCG staff and any third party commissioned by the CCG to undertake patient, carer and public engagement activity on its behalf. It explains the implications for benefits, employment law and tax, enabling local people to make an informed choice about receiving expenses and what this may mean for them.

This policy has been developed in conjunction with members of patient groups within the CCG. Input has also been sought from Durham County Council's Welfare Rights Team in the development of this policy to ensure that all involved are fully aware of how reimbursement of expenses can impact on benefits and HM Revenue and Customs rules.

2. The principles of good practice

- The way in which legitimate expenses are reimbursed should not create barriers that deter people from being involved, particularly people with specific sensory, physical, learning or language needs.
- Paperwork to claim reimbursement will be kept to a minimum and will be accessible and easy to understand.
- The CCG will ensure that there is adequate funding available to cover the cost of expense reimbursement.
- Members of the public will be reimbursed for out of pocket expenses incurred as a result of their involvement with the CCG as detailed in section 3 below.
- Members of the public are given the right information at the right time to be able to make an informed choice about how and on what terms they want to be involved.
- Individuals receiving benefits should undertake appropriate checks to ensure they prevent a breach of their benefit conditions. Breach of benefit conditions can result in benefits being stopped.
- A protocol will be developed (appendix 1) and regularly reviewed and updated to support the CCG in the effective operational practice of reimbursing patients, carers and members of the public

3. Scope of policy

The policy refers to patient and public activity which can be defined as:

“A process by which people are enabled to become actively and genuinely involved in defining the issues of concern to them; in making decisions about factors which affect their lives; in formulating and implementing policies; in planning, developing and delivering services; and in action to achieve change.....”¹

Engagement activity covered by this policy:

- Attending locality or CCG-wide patient reference group meetings
- Attending project group and general business meetings by CCG invitation
- Attending focus groups, workshops and specific meetings set up by the CCG
- Undertaking work on behalf of and as authorised and agreed by a CCG director/senior manager (e.g. attending conferences, seminars, workshops)

Engagement-type activity not covered by this policy includes:

- Individuals attending open public meetings such as publicly-advertised stakeholder events, CCG Governing Body meetings and formal consultation meetings, unless attending as a named participant by CCG invitation
- Individuals giving views through home-based/telephone interviews or questionnaires
- Attendance at practice patient group meetings
- Public health-type activity to encourage behaviour change or healthy lifestyle choices
- Collaborative working with representatives from other organisations who are funded through another source

4. Reimbursement

4.1 When should people be reimbursed?

In line with the scope of engagement activity defined in section 3 above, members of the public who have accepted a specific invitation by the CCG to take part in a meeting, training event, interview panel or a defined task or work programme should be reimbursed any pre-agreed out of pocket expenses. An example of a specific invitation is the attendance of members to attend a patient reference group meeting or inviting users of a specific service to attend a workshop to share their views.

Expenses will **not** be reimbursed where an individual chooses to attend an open public meeting e.g. the CCG's regular engagement events.

¹ *Community participation in local health and sustainable development: a working document on approaches and techniques*, World Health Organisation, 1999

In the event the CCG has paid an advancement under this policy and the recipient chooses to disengage from the meetings identified at section 3.0 (during the period for which payment was made), the CCG at its discretion may seek partial reimbursement of the advancement on a pro-rata basis.

4.2 Types of expenses

In the circumstances outlined above expenses will be reimbursed for:

- Travel (bus, train, car mileage or taxi if appropriate and the use of a taxi has been approved)
- Payments for replacement caring responsibilities, where every alternative method of engaging the necessary support without incurring caring costs has been explored and proved unviable
- Costs of meals and refreshments where these have not been provided and the expenditure is justified
- Accommodation costs for attending out of area conferences, training events on behalf of the CCG, subject to authorisation and sign off by a CCG director or authorised senior manager
- Administrative expenses – costs of essential printing/postage etc.

Payments of expenses will be kept to a minimum where possible by:

- Well-planned engagement opportunities at appropriate times and locations to meet participants' specific needs
- Booking of taxis in exceptional cases only and through approved taxi firms
- Provision of refreshments at meetings
- Encouraging provision of own food at meetings over mealtimes
- Provision of annual stationery packs for members (see Appendix 1 for other reimbursement options)

4.2.1 Travel

Reimbursement for travel will be offered in full for any pre-agreed involvement. This may include travel tickets, mileage and taxi fares. Where possible, taxi journeys must be booked by CCG staff and not individually by members of the public. Taxi companies should be checked to ensure they hold a vulnerable adults certificate.

Individuals using their own vehicles are required to ensure they have appropriate insurance cover.

4.2.2 Subsistence

Members of the public will usually be provided with refreshments during the course of their involvement if it is over a lunch or evening period. Where this is not possible any refreshments purchased can be reimbursed on production of receipts. This should not affect entitlement to any welfare benefits received. People will also be offered the opportunity to bring their own food to meetings if they prefer.

4.2.3 Administrative

If an individual has agreed to undertake specific tasks that require administration, the costs for stationery, postage, photocopying, administrative costs and telephone calls will be met and receipts must be provided for all these expenses. As an alternative, CCG group members who regularly attend meetings and receive papers by e-mail (who are not provided with printed papers) may receive a one-off annual expenses payment (see appendix 1 for all reimbursement options) as agreed to cover administration costs. This will not affect benefits – see 4.3 below.

4.2.4 Costs incurred for replacement care and individual support needs

To ensure that everyone has the opportunity to be involved, the CCG will reimburse pre-agreed costs incurred to enable an individual to participate, such as interpreters, signers, or personal care assistants. However, the exact arrangements should be discussed between the individual and the CCG and agreed in advance.

Childcare and substitute care costs will only be reimbursed when the care is provided by a Registered Person(s). Evidence of this will be required.

4.3 Expenses for individuals in receipt of benefits

In line with its equality duties, North Durham CCG / Durham Dales, Easington and Sedgefield CCG is committed to ensuring that individuals receiving benefits are in no way financially disadvantaged as a result of participating in the work of the CCG. The CCG has therefore ensured that its policy for the reimbursement of expenses does not preclude people in receipt of benefits such as unemployment, sickness and disability allowances, from becoming involved..

People in receipt of benefits are obliged to inform Jobcentre Plus about any change of circumstances. This includes being reimbursed for pre-agreed out of pocket expenses by the CCG, even though the reimbursement of expenses for volunteering has no impact on benefits. Details of an individual's participation may be required along with any expenses received to ensure the participation is voluntary and the expenses received relate to this activity.

4.4 Rates of reimbursement

The CCG will reimburse all expenses in accordance with this policy. Actual amounts will be reimbursed rather than rounded up or down sums. Evidence of expenses incurred such as taxi receipts, parking tickets etc. will be required. The HMRC approved mileage rates will be used for reimbursement for vehicle use.

5. Audit and monitoring

Senior CCG managers or CCG leads responsible for the meeting or activity will authorise payments or designate an appropriate officer to act on their behalf using the form at Appendix 2 for each re-imbusement claim.

The CCG's Audit & Assurance committee will monitor compliance with this policy.

6. Responsibilities

6.1 Chief Operating Officer (COO)

The Chief Operating Officer will be responsible for ensuring organisational compliance with the policy.

6.2 CCG responsibilities

The CCG will:

- Meet the costs of printing papers for meetings (see Appendix 1 for options) Reimburse expenses to people who have an agreement with the CCG and who have been invited to take part in a meeting, training event, interview panel or a defined task or work programme.
- Be prepared to reimburse a range of expenses, not just travel.
- Reimburse expenses at the current rates.
- Be consistent.
- Ensure that claimants complete expenses claim forms and provide receipts for all expenses that are to be reimbursed.
- Reimburse expenses for the exact amount, not an averaged amount or a rounded up amount.
- Provide help for people who find forms difficult to fill in.
- Make this reimbursement guide available to individuals and groups as appropriate.
- Make sure that staff who are authorised signatories are able to sign claims quickly so that expenses can be reimbursed without delay.
- Where possible reimburse travel expenses in cash on the day. Where this is not possible expenses forms should be available and a freepost envelope. Reimbursement must be made in cash if an individual does not have a bank account.
- Consider covering costs in other ways, e.g. provide stationary packs and freepost envelopes, make meeting rooms available to patient groups at no cost.
- Provide individuals with a named contact for them to discuss any expenses queries.
- Engage with members of the public in ways that respect the choices individuals make and do not compromise their independence. Public transport should be the preferred option and staff should encourage members of the public to use public transport rather than automatically ordering or approving the use of a taxi.
- Consider the use of community and volunteer transport schemes to support attendance at larger events.
- Remind individuals in receipt of benefits, particularly JobSeekers' Allowance, to inform JobCentre Plus of their involvement activity.

6.3 Patient, carer and public responsibilities

Individuals receiving expenses from the CCG must:

- Honestly and accurately complete expense claim forms as required
- Provide appropriate evidence of expenses incurred e.g. parking.

7. Monitoring, Review and Archiving

7.1 Monitoring

The Governing Body will agree a method for monitoring the dissemination and implementation of this policy. Monitoring information will be recorded in the policy database.

7.2 Review

7.2.1 The Governing Body will ensure that this policy document is reviewed in accordance with the timescale specified at the time of approval. No policy or procedure will remain operational for a period exceeding three years without a review taking place.

7.2.2 Staff who become aware of any change which may affect a policy should advise their line manager as soon as possible. The Governing Body will then consider the need to review the policy or procedure outside of the agreed timescale for revision.

7.2.3 For ease of reference for reviewers or approval bodies, changes should be noted in the 'document history' table on the front page of this document.

NB: If the review consists of a change to an appendix or procedure document, approval may be given by the sponsor director and a revised document may be issued. Review to the main body of the policy must always follow the original approval process.

7.3 Archiving

The Governing Body will ensure that archived copies of superseded policy documents are retained in accordance with Records Management: NHS Code of Practice 2009.

8. Equality Impact Assessment



North of England
Commissioning Support

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An Equality Impact Assessment (EIA) is a process of analysing a new or existing service, policy or process. The aim is to identify what is the (likely) effect of implementation for different groups within the community (including patients, public and staff).

We need to:

- Eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by the Equality Act 2010
- Advance equality of opportunity between people who share a protected characteristic and those who do not
- Foster good relations between people who share a protected characteristic and those who do not

This is the law. In simple terms it means thinking about how some people might be excluded from what we are offering.

The way in which we organise things, or the assumptions we make, may mean that they cannot join in or if they do, it will not really work for them.

It's good practice to think of all reasons why people may be excluded, not just the ones covered by the law. Think about people who may be suffering from socio-economic deprivation or the challenges facing carers for example.

This will not only ensure legal compliance, but also help to ensure that services best support the healthcare needs of the local population.

Think of it as simply providing great customer service to everyone.

As a manager or someone who is involved in a service, policy, or process development, you are required to complete an Equality Impact Assessment using this toolkit.

Policy	A written statement of intent describing the broad approach or course of action the Trust is taking with a particular service or issue.
Service	A system or organisation that provides for a public need.
Process	Any of a group of related actions contributing to a larger action.



STEP 1 - EVIDENCE GATHERING

Name of person completing EIA:	Daniel Blagdon
Title of service/policy/process:	Expense reimbursement policy for patient, carer and public involvement in engagement activity
Existing: <input checked="" type="checkbox"/> New/proposed: <input type="checkbox"/> Changed: <input type="checkbox"/>	
What are the intended outcomes of this policy/service/process? Include outline of objectives and aims	
To ensure individuals are not 'out of pocket' through participating in and contributing to specific engagement activities undertaken by the CCG. This policy is intended to try to address and remove potential barriers that an individual may encounter when looking to take part in specific engagement activities.	
Who will be affected by this policy/service /process? (please tick)	
<input type="checkbox"/> Staff members <input checked="" type="checkbox"/> Other	
If other please state:	
Patient, public and carers who are looking to participate in specific engagement opportunities /activities conducted by the CCG.	
What is your source of feedback/existing evidence? (please tick)	
<input type="checkbox"/> National Reports <input type="checkbox"/> Staff Profiles <input type="checkbox"/> Staff Surveys <input type="checkbox"/> Complaints/Incidents <input type="checkbox"/> Focus Groups <input type="checkbox"/> Previous EIAs <input checked="" type="checkbox"/> Other	
If other please state:	
Discussion with Patient Reference Group	

Evidence	What does it tell me? (about the existing policy/process? Is there anything suggest there may be challenges when designing something new?)
National Reports	
Staff Profiles	
Staff Surveys	
Complaints and Incidents	
Staff focus groups	
Previous EIA's	
Other evidence (please describe)	<p>Patient representatives involved in the review of this policy were active members of the CCGs Patient Reference Group. As such these are individuals who regularly make use of the policies and procedures set out in the policy.</p> <p>The members of the group felt that the current measures in place were suitable and met the requirements to support involvement.</p> <p>Consideration was given to the clarification of when an individual from the patient group is acting on behalf of that group or whether they are doing so as an interested individual.</p> <p>Members also thought that the detail and information contained within Appendix 1 sets out the policy very clearly and felt the rest of the document was duplication which did not add anything further.</p>



STEP 2 - IMPACT ASSESSMENT

What impact will the new policy/system/process have on the following staff characteristics: (Please refer to the 'EIA Impact Questions to Ask' document for reference)

Age A person belonging to a particular age

Forms are made available to record and submit expenses in both paper and electronic formats to try to respond to preferences in methods of completing.

Disability A person who has a physical or mental impairment, which has a substantial and long-term adverse effect on that person's ability to carry out normal day-to-day activities

Specific support can be provided to an individual through staff involved in the engagement activity to help them complete the form where required.

As part of standard practices ahead of specific pieces of engagement work the CCG would look to understand / ascertain information from participants about any support needs they have and how they can be met in preparation for an individual's involvement.

Gender reassignment (including transgender) Medical term for what transgender people often call gender-confirmation surgery; surgery to bring the primary and secondary sex characteristics of a transgender person's body into alignment with his or her internal self perception.

The policy set out in the document is intended to provide proactive support to individuals looking to participate in specific engagement activities.

Marriage and civil partnership Marriage is defined as a union of a man and a woman (or, in some jurisdictions, two people of the same sex) as partners in a relationship. Same-sex couples can also have their relationships legally recognised as 'civil partnerships'. Civil partners must be treated the same as married couples on a wide range of legal matters

The policy set out in the document is intended to provide proactive support to individuals looking to participate in specific engagement activities.

Pregnancy and maternity Pregnancy is the condition of being pregnant or expecting a baby. Maternity refers to the period after the birth, and is linked to maternity leave in the employment context.

The policy set out in the document is intended to provide proactive support to individuals looking to participate in specific engagement activities.

As part of standard practices ahead of specific pieces of engagement work the CCG would look to understand / ascertain information from participants about any support needs they have and how they can be met in preparation for an individual's involvement. In the past this has included whether people require a crèche facility at certain engagement events.

Race It refers to a group of people defined by their race, colour, and nationality, ethnic or national origins, including travelling communities.

The policy set out in the document is intended to provide proactive support to individuals looking to participate in specific engagement activities.

Future consideration and support would need to be given if information / copies of expenses forms were required in alternative languages.

Religion or belief Religion is defined as a particular system of faith and worship but belief includes religious and philosophical beliefs including lack of belief (e.g. Atheism). Generally, a belief should affect your life choices or the way you live for it to be included in the definition.

As part of standard practices ahead of specific pieces of engagement work the CCG would look to understand / ascertain information from participants about any support needs they have and how they can be met in preparation for an individual's involvement.

The policy set out in the document is intended to provide proactive support to individuals looking to participate in specific engagement activities.

Sex/Gender A man or a woman.

The policy set out in the document is intended to provide proactive support to individuals looking to participate in specific engagement activities.

Sexual orientation Whether a person's sexual attraction is towards their own sex, the opposite sex or to both sexes

The policy set out in the document is intended to provide proactive support to individuals looking to participate in specific engagement activities.

Carers A family member or paid helper who regularly looks after a child or a sick, elderly, or disabled person

As part of standard practices ahead of specific pieces of engagement work the CCG would look to understand / ascertain information from participants about any support needs they have and how they can be met in preparation for an individuals involvement.



STEP 3 - ENGAGEMENT AND INVOLVEMENT

How have you engaged with staff in testing the policy or process proposals including the impact on protected characteristics?

The review of the existing expenses policy for patient /carer involvement was reviewed directly with the CCGs Patient Reference group which meets on a monthly basis. The document was circulated directly to all members (who represent North Durham GP practices) in advance of the meeting to review. A discussion on the content and its suitability was then undertaken in the meeting where minutes were taken.

Please state how staff engagement will take place:



STEP 4 - METHODS OF COMMUNICATION

What methods of communication do you plan to use to inform staff of the policy?

Verbal – through focus groups and/or meetings Verbal - Telephone
 Written – Letter Written – Leaflets/guidance booklets
 Email Internet Other

If other please state:



STEP 5 - SUMMARY OF POTENTIAL CHALLENGES

Having considered the potential impact on the people accessing the service, policy or process please summarise the areas have been identified as needing action to avoid discrimination.

Potential Challenge	What problems/issues may this cause?
1 Information and or documentation required in alternative languages or formats	People not understanding or being able to take up the support for 'out of pocket' expenses



STEP 6- ACTION PLAN

Ref no.	Potential Challenge/ Negative Impact	Protected Group Impacted (Age, Race etc)	Action(s) required	Expected Outcome	Owner	Timescale/ Completion date
1.	Information and or documentat ion required in alternative languages or formats	Disability, Race	Work with partners (VCS organisations / NECS communications teams) where required to produce suitable alternative formats of the information.	Accessible formats of information produced	DB	December 2017

Ref no.	Who have you consulted with for a solution? (users, other services, etc)	Person/ People to inform	How will you monitor and review whether the action is effective?



SIGN OFF

Completed by:	Daniel Blagdon, Engagement Lead, NHS North Durham CCG Tina Balbach, Engagement Lead, Durham Dales, Easington and Sedgefield CCG
Date:	19th December 2017
Signed:	
Presented to: (appropriate committee)	Executive Committee
Publication date:	December 2017

North Durham CCG / Durham Dales, Easington and Sedgefield CCG Operational Procedure for the Reimbursement of Expenses for Patients, Carers and the Public involved in engagement activities

1. Introduction

This procedure underpins North Durham CCG / Durham Dales, Easington and Sedgefield CCG's Patient and Public Expenses Reimbursement Policy. It is designed to support CCG staff in implementing a clear, uncomplicated expenses policy while ensuring the organisation is able to properly account for any payments made.

It is recognised that paying out of petty cash at a meeting for small amounts to reimburse train or bus fares should require the minimal paperwork and would be the preferred method of payment.

Reimbursement of car mileage and carers costs requires an individual to make a claim for payment which will take time to process however with sufficient notice and planning any delay should be kept within an acceptable time.

2. Making payments

Patient Reference Group members who have attended at least three meetings, will be entitled to reimbursement for printing of meeting papers at home. This will apply once they have signed confidentiality agreements and undertaken induction.

Those who meet the criteria may take up one of the following options for re-imburement:

- Receive a one-off annual expenses payment of £50 per calendar year to cover printing and administration costs.
- Receive £50 towards the cost of purchasing an electronic device to view papers on (wi-fi, maintenance and repair of the device becomes the member's own responsibility)
- Receive an annual stationery pack from the CCG to include black ink cartridges and paper

Cash payments can be authorised for small payments i.e. less than £20. Arrangements need to be made to have a float of no more than £250 cash available at meetings. The CCG would need to set this up according to the petty cash system.

Any amounts over £20 must be paid through the generation of an invoice.

Payments must only be made on receipt of a signed, agreed expense claim form (appendix 2). Records of payments made must be confidentially maintained and stored, in line with data protection legislation and guidelines.

3. Preparation before meetings/activity

In order to minimise the requirement for additional expenses, the following need to be considered and discussed with patient representatives before organising any meetings which service users, carers, or patients are expected to attend:

- arrangements are made for transport where necessary
- papers for the meetings are in accessible formats and distributed well in advance (e.g. avoiding jargon and providing paper copies)
- consideration is given to the timing of meetings (e.g. within school hours)
- provision of advocates, interpreters and/or personal assistants where required
- arrangement of the room including any access or adaption aids (e.g. hearing loop)
- refreshments to be available (check possible dietary needs for attendees)
- regular comfort breaks during the meetings
- availability of petty cash float and expense forms for completion.

4. Payment of Travel Expenses

Payments to reimburse reasonable travel and subsistence costs incurred include:

- Public transport (actual cost of travel, supported by ticket or receipt)
- Private car (at the current HMRC rate) Parking costs (actual cost, supported by ticket or receipt)
- Taxi (by prior agreement only with CCG where all other potential routes of transport have proven untenable)

Claims will only be accepted for use of a private vehicle:

- for the most direct route available
- if the vehicle is covered by full third party insurance, including cover against risk or injury to, or death of, passengers, and damage to property, and that the policy is maintained at the date of the claim
- if the vehicle is maintained at all times in a roadworthy condition by terms of the insurance policy covering the vehicle.

The CCG may request verification of any of the above at any time, for example by asking for a copy of an MOT certificate or valid certificate of insurance.

If the use of a taxi is unavoidable the organiser of the meeting can order a taxi using an approved taxi firm. The taxi firm can then be paid by invoice.

5. Payment of Support Costs

The following costs will be reimbursed if the carer or patient needs additional support to enable them to attend meetings. Support costs will only be reimbursed if they have been arranged by prior arrangement with the individual and every opportunity to minimise the need for those costs have been explored and discounted.

- Childcare costs
- Replacement carer costs
- Personal assistant costs
- Interpreter Costs

The payment for caring/personal assistant costs will be made directly to the agency (or individual) providing the care on production of an invoice, except for individuals who are in receipt of a personal health budget and are authorised to make direct payments for care; in these circumstances the payment will be made direct to the personal health budget holder.

6. Definitions

The Public

A resident of North Durham CCG / Durham Dales, Easington and Sedgfield CCG population area who has an interest in, or is affected by decisions or plans carried out by North Durham CCG / Durham Dales, Easington and Sedgfield CCG.

Patient

An individual residing in North Durham CCG / Durham Dales, Easington and Sedgfield CCG, who has received, is currently receiving or has the potential of receiving a health or social care service.

Carer

An individual (aged 16 and over) who has provided, currently provides or intends to provide a substantial amount of care on a regular basis for another individual.

Volunteer

Any individual who has been recruited and registered to perform volunteer tasks within the premises and service areas of North Durham CCG / Durham Dales, Easington and Sedgfield CCG.

Appendix 2 Expenses Claim Form

Name		Invoice number	
Address		Invoice date	

Details of expenses occurred		£
Total claimed		

Payment information

Bank details

Account Name

Sort Code

Account Number

Or Cheque to be made payable to

Email address for remittance advice
(if blank, remittance will be posted)

Authorisation (for CCG use only)

Authorised signatory name

Signed

Dated

Locality

Central cost code

Subjective code

Cash payment received	
Signed	_____
Print name	_____