



National Policy National Procedure National Protocol National Guideline
National Clinical Guideline

HSE National Policy on Reimbursement of Expenses for Patient and Service User Partners

Document Governance¹

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VERSION CONTROL UPDATE		
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Version 2	01/10/2015	Policy for the reimbursement of expenses for service users participating in the design, development and delivery of services in the HSE
Version 3	23/09/2024	<p><u>Key updates:</u></p> <ol style="list-style-type: none"> 1) Travel expenses single rate (flat rate) increase that is aligned to a point on the Civil Service Rates 2) Subsistence rates in line with current Civil Service Rates 3) Role of HSE Contact Person set out in relation to the management of Patient and service user partner expenses. 4) Role of patients and service users in the expenses and claims process.
<p>Document management notes: This revised policy replaces all previous versions of the Policy for the reimbursement of expenses for service users participating in the design, development and delivery of services in the HSE</p>		
PUBLICATION INFORMATION ³		
Topic:		
Reimbursement of Expenses for Patient and Service User Partners		
National Group:		
Public Involvement, Culture & Risk Management Directorate		
Short summary:		
This policy sets out the process to reimburse patient and service user partners for expenses resulting from participation in agreed involvement activities about the design, development and delivery of our services.		
Description:		
<p>The policy includes:</p> <ol style="list-style-type: none"> 1) The patient and service user involvement activities for which expenses can be reimbursed 2) The rates to be paid for travel and subsistence 3) The forms which need to be completed to make a claim <ol style="list-style-type: none"> a) Vendor Form (first time only) See section 3.7.10 in policy b) Claim Form 4) The support HSE staff provide to patient and service user partners throughout the expenses process 5) The process used to make a claim by patient and service user partners 6) The advance authorisation of travel and subsistence plans 7) How HSE staff process claims 8) When a patient and service user partner receives their expenses. 9) Inclusion requires the recognition of barriers to partnership. Payments to remove barriers will be considered and pre-approved on a case-by-case basis. 		

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1. Planning

1.0 Overview

To support the provision of high-quality care across health and social care services, we will build real and meaningful engagement, involvement, collaboration and partnerships between patients, service users, families, health professionals and organisations, both voluntary and professional. ¹

1.1 Purpose

The main aim of this policy is to:

- Increase patient and service user travel expenses to a single rate (flat rate) that is aligned to a point on the Civil Service Rates
- Reimburse patient and service user subsistence rates in line with Civil Service Rates
- Inclusion requires the recognition of barriers to partnership.
Payments to remove barriers will be considered and pre-approved on a case-by-case basis.

The policy includes:

- The patient and service user partnership involvement activities for which expenses can be reimbursed
- The rates to be paid for travel and subsistence
- The forms which need to be completed to make a claim
 - Vendor form – first claim only (Sample form attached (appendix 2))
 - Claim Form
- The support HSE staff provide to partners throughout the expenses process
- The process used to make a claim by patient and service user partners
- The advance authorisation of travel and subsistence plans
- How HSE staff process claims
- When a patient service user partner receives their expenses
- The process to acknowledge and manage inclusion barriers.

1.2 Scope

1.2.1 In scope:

This policy states the involvement activities for which patient and service user expenses will be reimbursed.

Patients and service users are involved on a voluntary basis:

What is a 'volunteer' or 'voluntary worker'?

Volunteering is any time willingly given, either formally or informally, for the common good and without financial gain.”³

If a patient service user representative receives no payment or reward for their time, work done or services provided, they are regarded as being a volunteer or voluntary worker.

1.2.1.1 All reimbursement payments to patient service user partners are made on the understanding that the individual is involved on a voluntary basis.³

Patient Service Users are involved on a voluntary basis and as such are not regarded in any way as employees of the HSE.

1.2.1.2 The Revenue currently permits the payment of non-taxable travel and subsistence expenses to those involved on a voluntary basis.

Note: This position is not currently covered by any taxation legislation and could be withdrawn at any time by the Revenue.

1.2.1.3 Reimbursement relates solely to:

Expenses incurred by patients and service users following an invitation to be involved in:

- A meeting
- An activity
- A project
- A promotional event showcasing a project they have been involved in

1.2.1.4 Expenses which may be approved include:

- Travel costs
- Subsistence costs:
- Overnight Allowance
- Day Allowance
- Inclusion related expenses

All expenses must be pre-approved before the involvement activity.

1.2.2 Out of Scope

This expenses policy **does not apply** where a member of the public attends a launch or event which is open to everyone (e.g. a public meeting of the Annual Review, Healthcare events), or other meetings without specific invitation in a HSE involvement activity.

Where a person has not been specifically invited to attend an involvement activity, they are not

eligible for the reimbursement of out of pocket expenses.

Attendance at roadshows, public meetings and attendance at board meetings as a member of the audience and completion of surveys are not eligible activities for reimbursement.

1.2.3 Target users

- HSE staff responsible for working with public, patient and service user partners
- Patient and service user partners working on agreed HSE events and activities

1.2.4 Target Population

This is a national policy that applies to all HSE services

1.3 Objectives

The objectives of this policy are that staff and patient service user partners know:

- 1.3.1 The activities for which expenses can be reimbursed
- 1.3.2 The activities for which expenses cannot be reimbursed
- 1.3.3 The rates to be paid for travel and subsistence
- 1.3.4 The forms which need to be completed to make a claim
- 1.3.5 How to use the forms
 - Claim Form
 - Vendor Form (first time only)
- 1.3.6 The support HSE staff provide to partners
- 1.3.7 The role of the Contact Person
- 1.3.8 The process used to make a claim by patient and service user partners
- 1.3.9 The advance authorisation of travel and subsistence plans
- 1.3.10 How HSE staff process claims
- 1.3.11 When a patient and service user partner receives their expenses
 - 1.3.11.1 How to check the progress of a claim
 - 1.3.11.2 How to check the payment when received
- 1.3.12 How to manage Inclusion expenses

1.4 Outcomes

- 1.4.1 Version 3 of the policy is located in one place which is available to patient and service user partners, staff and stakeholder.

- 1.4.2 Increased efficiency in the claims process for patients and service user partners
- 1.4.3 Increased ease of claiming for patients and service users
- 1.4.4 Documented list, held by the National Office for Patient Service User Experience providing access to a network of people, patients, service users, staff, stakeholders and services the policy applies to.
- 1.4.5 Patient and service user partners understand what they may claim for and how to submit a claim.
- 1.4.6 National Patient and Service User Forum members:
 - 1.4.6.1 Share information about the policy, highlighting the 'what to do' style Appendices, with their networks
 - 1.4.6.2 Report their collated experiences into the next Review process.
- 1.4.7 The profile of patient and service user partners is evidenced as being pro-actively involved and integral to the implementation, monitoring and evaluation and review process of this policy.
- 1.4.8 A data set of queries about inclusion expenses will be provided by the National Patient Service User Engagement office detailing the Health Regions and services requests are received from, the content of queries received including the decision-making criteria discussed / decisions made and documented
- 1.4.9 Number of inclusion requests been received from all areas of our HSE
The sample data set will enable questions to be derived from the data which will be used to inform the 2025 policy review process

1.5 Disclosure of interests

Each member of the development group has completed a declaration of interest form which have been retained.

Patient and service user partners on this project identified a conflict of interest in that they are likely to benefit from the increased provisions in this policy.

In recognition of this, the decision about the rates to be paid was made by the National Director for Public Involvement, Culture and Risk Management in discussion with Working Group staff members.

The discussion considered the practical constraints which currently prevent full alignment to Civil Service Rates identified by the Working Group.

The decision making process was made in the absence of the patient service user partners.

1.6 Rationale / alignment with HSE national priorities

The Department of Public Expenditure and Reform made changes to:

- Motor Travel Rates: Circular 16/2022 ⁴
- Subsistence Rates: Circular 19/2023 ⁵

The HSE: Our National Service Plan 2024 states:

To support the provision of high-quality care across health and social care services, we will build real and meaningful engagement, involvement, collaboration and partnerships between patients, service users, families, health professionals and organisations, both voluntary and professional.

In combination, these provide the basis for the rate of reimbursement review to align patient and service user with Civil Service Rates as far as is possible at this time.

1.7 Supporting evidence.

- HSE: Our National Service Plan 2024 ¹
- Revenue Travel and Subsistence: Voluntary Work ²
- The National Volunteering Strategy 2021 – 2023 ³
- Department of Public Expenditure and Reform Finance Circular 16/2022: Revised Motor Travel Rate Regulations ⁴
- Department of Public Expenditure and Reform Finance Circular 19/2023: Domestic Subsistence Allowance ⁵
- National Financial Regulations B-4 Version 1.1.4 ⁶
- Medical Card and GP Visit Card National Assessment Guidelines ⁷

2.0 Methodology

The Public Involvement, Culture and Risk Management Directorate identified compensation deficits in the Patient and Service User Expenses Reimbursement Policy 2015.

As the Annual Service Plan 2024 emphasises the importance of patient and service user involvement, at a time of rising costs, consideration was given to:

- increasing the rate paid for travel
- aligning the subsistence rates with Civil Service Rates
- barriers to inclusion
 - tax implications

- social welfare implications

The travel rate (18c per kilometre) is currently aligned to 2015 means test rate for the medical card applications. This rate has not changed.⁷

Consideration was given to full alignment with Civil Service Rates however, this would require the recording of:

- Cumulative kilometres travelled as the rate paid is dependent on the number of kilometres travelled.
- Cumulative travel distances would need to be collated across all parts of the country as some partners are involved in activities for which different budget holders are responsible.

Example: A person travelling to an involvement activity called by a national function may also be involved in a local area meeting.

Currently, there is no process by which these separate budget holder travel distances can be brought together.

- Patient and service user partners would have to provide details of vehicle insurance, tax and NCT as staff do.

Currently, there is no process by which this can be done.

National consultation, including Health Regions and patient and service user partners, is needed to progress this work.

Therefore the decision was made to increase the current rate of 18 cent per kilometre to the rate of 43.4 cent per kilometre, the mid-range point in Band 1 from the Civil Service Rates in the table below.

This increases the current rate approximately 240% (2.4 times the current rate).

The intention is to undertake an immediate further review of the policy to:

- 1) Consider if it is possible to fully align with Civil Service Rates while satisfying all relevant legislation, including Revenue, Social Welfare and GDPR considerations.
- 2) Involve responsibility holders from Health Regions and HSE centre

Table 1: Motor Travel Rates (From 1st September 2022)

Official Motor Travel in a Calendar Year	Engine Capacity up to 1200cc	Engine Capacity 1201cc – 1500 cc	Engine Capacity 1501cc and over
Up to 1,500km (Band 1)	41.80 cent	43.40 cent	51.82 cent
1,501 – 5,500 km (Band 2)	72.64 cent	79.18 cent	90.63 cent
5,501 – 25,000 km (Band 3)	31.78 cent	31.79 cent	39.22 cent
25,001 km and over (Band 4)	20.56 cent	23.85 cent	25.87 cent

Rates of reimbursement are in line Department of Public reform civil service - Motor Travel Rates 2022 rates effective from 1st September 2022.

3.0 Procedures

3.1. Travel Costs

Patient and service user partners are expected to use public transport or the most cost effective, environmentally friendly form of transport where practical.

The HSE will reimburse motor travel costs incurred by patient and service user partners based on the following:

- 3.1.1. Travel rate of 43.4 cent per kilometre for the shortest return journey from their home to where the involvement activity is taking place
- 3.1.2. Motorcycle rate of 23.72 cent per kilometre
- 3.1.3. Bicycle rate of 8 cent per kilometre
- 3.1.4. Refund return bus fare (on production of ticket)
- 3.1.5. Refund train fares (on production of ticket).
- 3.1.6. Refund taxi fare (on production of a valid receipt)
- 3.1.7. If an individual uses their own vehicle where public transport could have been used, the amount of costs reimbursed must not exceed the cost of public transport (including that of passengers).
- 3.1.8. The HSE will reimburse travel costs incurred when an involvement activity has been cancelled at short notice and where the patient or service user partner was not informed of the cancellation before travelling.
- 3.1.9. It is the responsibility of patient and service user partners to ensure that the vehicle they use is on the road legally and that their driving licence is valid.

3.2. Taxi

Taxis should only be used where there is reasoning on the grounds of:

- 3.2.1. A number of people are travelling together so it is cost effective;
- 3.2.2. Personal safety, for example travelling late at night;
- 3.2.3. Disability, health reasons or specified individual need,
- 3.2.4. Travelling to different meetings in the same area and on the same day;
- 3.2.5. Travelling with heavy or bulky items of equipment or luggage;
- 3.2.6. When it is the only reasonable mode of transport.

If the patient and service user partner feels a taxi is necessary, contact should be made with the HSE identified Contact Person for the project to explain the situation and request approval for use of a taxi. If the taxi is approved, the HSE Contact Person must advise in writing of this.

If the use of a taxi is not approved, the HSE Contact Person will engage with the patient and service user partner to consider other options.

3.3. Parking/Toll costs

Parking and toll costs incurred for the duration of HSE involvement activity will be refunded for the period of the activity on production of a receipt or ticket.

Parking fines and any other motor fines incurred will not be covered.

If a patient and service user partner has to go through a toll to attend a HSE meeting, their toll costs will be reimbursed on the production of a valid receipt.

3.4. Overnight Accommodation Rates

An Overnight allowance of €195 is paid for an absence of 24 hours from the time of departure to the return. This is not payable for an absence at any place within 100 km of patient and service user partner. However, in exceptional circumstances where the Contact Person approves it, a night allowance may be paid for an absence on duty at any place in excess of 50 km of home.

Personal incidental expenses incurred by a patient and service user partner during their hotel stay will not be paid for by the HSE.

Examples of personal incidental expenses are:

- Personal telephone calls
- Room service
- Alcoholic beverages

Family members cannot claim for accommodation and meals **except** when they attend as a carer/personal assistant. All such expenses must be agreed in writing in advance of an event with the named HSE Contact person (refer to section 3.7)

Table 2: Overnight Allowance –Outside of Dublin Area.

Domestic overnight subsistence rates (from 14 December 2023) – Outside of Dublin Area		
Rate Category	Rate	What this Rate Includes.
Normal Rate	€195 .00	This Rate covers your Hotel Stay (B&B Rate) and the cost of 2 Meals. A copy of Hotel Bill and receipts for subsistence MUST be provided with submitted claim. <u>***Any Hotel and Subsistence Costs over the approved rate of €195.00 will not be refunded and must be borne by the claimant.</u>
<u>Reduced Rate</u>	€175.50	<u>Non - Applicable</u>
<u>Detention Rate</u>	<u>€ 97.50</u>	<u>Non - Applicable</u>

Dublin Overnight Stay Only

A vouched overnight accommodation rate of maximum €195 (Bed & Breakfast), plus a 10 hour subsistence rate may be claimed. Hotel & Subsistence receipts are required. Please note a credit/debit card receipt is not sufficient by itself.

Table 3: Overnight allowance – Dublin area only

Domestic overnight subsistence rates (from 14 December 2023) – Dublin Area Only		
Rate Category	Rate	What this Rate Includes.
Dublin Hotel Allowance	€195.00 Allowance For Hotel Stay (B&B Rate) & An additional amount of € 42.99 for Subsistence may be claimed.	This Rate of €195 covers Hotel Stay (B&B) only. A Subsistence amount of €42.99 may also be claimed for a 10 Hour stay. A copy of Hotel Bill and Receipts for Subsistence MUST be provided with submitted claim.

Table 4: Example of a Patient and service user partner attending a HSE Involvement activity:

- Less than 5 hours = no rate applicable
- More than 5 hours but less than 10 hours = 5 hour rate
- More than 10 hours but less than 24 hours = 10 hour rate
- Up to 24 hours and less than 29 hours = overnight rate only
- 29 hours and less than 34 hours = overnight rate + 5 hour rate
- 34 hours = overnight rate + 10 hours

3.5. Domestic Subsistence Allowances

3.5.1. This allowance is paid for absence from home for at least 5 hours.

3.5.2. This is not payable for any absence within 8 kilometres of the person's home.

The table below sets out the rates payable for subsistence costs when attending a HSE Involvement activity:

Table 5: Domestic Subsistence Allowances

Domestic day subsistence rates (from 14 December 2023)	
Period of assignment	Rate
Ten hours or more	€42.99
Between five and ten hours	€17.92

3.5.3. Where meals are provided:

- where a claim is allowable for the 5-hour subsistence rate and a meal was provided, no subsistence claim can be made
- where a claim is allowable for the 10-hour subsistence rate and a meal was provided, the 5 hour subsistence rate claim can be made

3.5.4. The total number of hours of involvement activity should be entered in the space provided on the claim form.

3.5.5. Receipts for all subsistence claims are required.

3.6. Inclusion expenses

It is the intention of the HSE to consider reasonable costs associated with involvement activities to support the inclusion of patient and service user partners in the design, development and delivery of services in the next review of this policy.

In the meantime, if there are costs that are barriers to patient and service user partners participating in involvement activities an exceptional process has been incorporated into this policy.

All such expenses, from all services, **MUST** be reviewed and approved through the Public Involvement, Culture and Risk Management Directorate.

This is to ensure that consideration is given to any tax or social welfare implications that may arise on payment of such costs.

3.7. Procedure for pre- approval process for expenses

3.7.1. Prior to the commencement of engagement, the HSE Contact Person and the patient and service user partner invited to be involved will discuss:

- Travel
- Subsistence

- Barriers to inclusion

- 3.7.2. A proposed plan agreed between the patient and service user partner and the HSE Contact person.
- 3.7.3. The HSE Contact Person may need to seek authorisation for the proposed plan from the project lead.
- 3.7.4. Barriers to inclusion are identified in the proposed plan, the HSE Contact Person will engage with the HSE Public Involvement, Culture and Risk Finance lead reimbursementcultureandrisk@hse.ie to discuss the barriers and consider solutions.
- 3.7.5. Through this process, information on tax implications will be provided.
- 3.7.6. The Contact Person will then discuss this further with the patient and service user partner.
- 3.7.7. Once agreement is reached on allowable expenses, the Contact Person will seek internal HSE approval, as appropriate.
- 3.7.8. The HSE Contact Person will notify the patient and service user partner in writing what expenses will be reimbursed. This can be by email, letter or text.
- 3.7.9. The HSE Contact person will then check if the patient and service user partner has been included as a HSE vendor for that area. This is required for the HSE to process payments.
- 3.7.10. If this is not done, the HSE Contact person will provide the patient and service user partner with a 'Vendor' Form. There may be variations in this form across the HSE. The required information is:
 - Name
 - Home address
 - Contact details
 - Bank details such as IBAN & BIC Numbers.
 - A sample of a vendor form is provided in appendix 2
 - Signature: The form must be signed by the patient and service user partner as electronic or typed signatures are not accepted. It can then be submitted either by post or electronically.

3.8. Procedure for Claiming Reimbursement of Expenses.

When reimbursing patient and service user partners the following procedure should be adhered to:

- 3.8.1. Claims should be made through the Patient and Service User Claim Form (see **Appendix 1**).
This form is available on the HSE website or from the HSE Contact Person initiating the activity that the person is involved in.
- 3.8.2. A completed and signed form, with relevant receipts provided, should be returned to the HSE Contact Person for processing of the payment
- 3.8.3. Claims can be submitted electronically
- 3.8.4. All claims must be submitted on the approved expenses form within one month of the costs being incurred. If this is not possible, they must be submitted within three months at the latest.

- 3.8.5. Claims can only be submitted outside of the three-month timeframe in exceptional circumstances. Where this is the case, the claimant must inform the HSE Contact Person in writing outlining the reason for the delay in submitting the claim.
- 3.8.6. All reimbursement expenses will be made by bank transfer to a nominated bank or building society included on the patient and service User vendor set up formal.
- 3.8.7. If claimants Bank details need to be updated, a new vendor application form will need to be completed and submitted to the HSE Lead by the claimant.
- 3.8.8. Claims will only be accepted for use of a private car and motorcycle. Patient and service user partners are responsible for ensuring that they
- Use the most direct route available
 - It is the responsibility of patient and service user partners to ensure that the vehicle they use is on the road legally and that their insurance policy covers their journeys as a result of their involvement with HSE and that their driving licence is valid.
- 3.8.9. The HSE will not pay the cost of fines or other penalties that a patient and service user partner may face for breaking motoring laws, nor will it pay parking fines or clamping charges.

4.0 Roles and responsibilities

4.1 Patient and Service User Partners

- 4.1.1 Meet with the HSE Contact Person to discuss the travel arrangements and seek approval for incurring associated travel expenses.
- 4.1.2 If this is the first time you are claiming expenses, you must provide your bank account details.
- 4.1.3 This is done using a Vendor Set up Form. Different parts of the HSE may use different forms. See Appendix 2 for example of a Vendor form
- 4.1.4 Keep a copy of all your receipts for food and overnight expenses
- 4.1.5 Fill in the Patient and Service User Travel Claim Form – see **Appendix 1** for further information.
- 4.1.6 At your meeting the HSE Contact Person who is responsible for liaising with you will offer you an addressed envelope.
- 4.1.7 You can:
- Either hand your completed form to the person before the end of the meeting
 - Post your completed form and the originals of the receipts using the envelope you were given (you may claim for postage also)
 - Submit your claim electronically
- 4.1.8 All claims must be submitted no later than 30 days after the involvement event.

4.2 HSE Contact Person

- 4.2.1 Hold an initial meeting with the patient and service user partner to discuss their initial plans on travel and subsistence relating to the involvement activity. (this meeting can be held through Teams)
- Discuss and plan for associated reimbursement of expenses.
- 4.2.2 If inclusion expenses are being sought, engage with HSE Public Involvement, Culture and Risk management Finance lead by email to reimbursementcultureandrisk@hse.ie to explore same.
- 4.2.3 Seek approval from the relevant HSE Manager for associated reimbursements
- 4.2.4 Provide written approval to the patient and service user partner for expenses approved by the relevant HSE Manager.
- 4.2.5 Ensure that the patient and service user partner is set up on the HSE finance system for that area in line with local arrangements.
- 4.2.6 Ensure that expense claim forms are available to patient and service user partners and act as a point of contact for any queries on the completion of these documents.
- 4.2.7 The Contact Person is responsible for ensuring that all:
- Claims comply with this policy and Revenue guidelines
 - Documentation to support the claim has been submitted.
 - Incorrect or incomplete expense claims must be returned to the claimant, providing any support needed to ensure a valid claim is submitted
- 4.2.8 Ensure appropriate paperwork is passed to HSE Finance administration.
- 4.2.9 Ensure claims submitted via finance system are authorised and actioned for payment within one month of the claim being submitted.
- 4.2.10 If a claim is not authorised, to contact the patient and service user partner and discuss the reason why claim has not been authorised yet and provide any support needed to submit a valid claim.
- 4.2.11 Act as a point of contact for patient and service user partners to meet (this could be an online meeting) and discuss the most appropriate travel arrangements.
- 4.2.12 Ensure receipts and documentation are appropriately filed/stored.

4.3 HSE Public Involvement, Culture and Risk Management – Finance Lead

- 4.3.1 Liaise with HSE Taxation Department to ensure current taxation guidelines are adhered to. Provide a final decision to the HSE Contact Person in a timely manner.
- 4.3.2 Maintain a decision log of inclusion expenses for presentation at next policy review.

4.3.3 Consider and advise on any requests for reimbursement of Inclusion expenses with the local area.

**4.4 Senior Managers
e.g. Regional Executive Officers/Chief Executive Officers/Chief Officers, Assistant National Directors, Integrated Healthcare Area Managers**

4.4.1 Ensure that there are adequate and appropriate arrangements in place for the successful implementation, monitoring, evaluation and audit of this Policy throughout their respective areas of responsibility.

4.4.2 Ensure that necessary resources are allocated and available for the implementation of this Policy.

5 Consultation

5.1 Stakeholder involvement

This policy was developed in conjunction with the National Office of Public Involvement, Culture and Risk Management after consultation with patient and service user partners highlighted the need:

- to update travel and subsistence rates
- consider barriers to inclusion

5.2 Finance Consultation

Consultation took place with HSE National Finance team with all feedback and recommendations included in the updated policy that ensures this policy complies with relevant legislation and regulations.

5.3 Taxation Consultation

Current Irish taxation laws on the reimbursement of expenses were reviewed to ensure this policy is compliant with current legislation.

Consultation with HSE Taxation Department was facilitated to provide clarification on queries related to the payment of unspecified expenses to patient and service user partners.

The HSE taxation Department engaged directly with Revenue to seek clarification on any queries raised. (Need to ensure that documentation is in the 'store')

Further consultation with the HSE Taxation Department and Revenue will be required when considering unspecified expenses in the next review of this policy which is beginning in

January 2025.

6 National implementation plan

6.1 Describe the structure and governance of your national implementation team.

This policy is owned by the National Director, Public Involvement, Culture and Risk Assessment.

The responsibility for the implementation of this policy is assigned to the Patient and Service User Experience Lead.

Implementation Plan Appendix 5.

6.2 Expected date of full implementation of Policy

The policy will come into effect on January 1st 2025.

7 Governance and approval

This policy has been reviewed and recommended for approval by the Policy Approval Group, chaired by the Assistant National Director of Patient and Service User Experience team on Dec 9th 2024 and approved by the Director of Public Involvement, Culture and Risk Management on December 10th 2024.

8 Communication and dissemination plan

The Policy will be disseminated by the National Patient Service User Experience Office for immediate implementation by all HSE.

The National Patient and Service User Forum members of the Policy Working Group will highlight the key changes with the Forum membership and encourage dissemination through their extended networks.

All staff requesting patient and service user involvement partners through the Patient and Service User Experience Team will be informed of the revised policy

Please see the implementation plan in appendix 5 which includes the development of a Communication plan.

9 Sustainability

An implementation plan has been developed and will be implemented which will include auditing the implementation of the policy within the first year.

Feedback mechanisms have been put into place to ensure that any queries can be considered and incorporated into the next review of the documentation.

The travel rates used are linked to public sector travel and subsistence rates so any changes to those rates will automatically apply to the rates payable in this policy.

A review and update of the policy will commence in January 2025 to consider inclusion costs that impact on patient and service user partner's ability to contribute to meetings.

10 Review / update

Next review date

February 2025.

It is intended that this policy will be reviewed and further updated over the next 12 months as more robust processes are required for inclusion expenses.

This will be done by partnering in a co-design process with the:

- National Patient and Service User Forum
- Health Regions
- Relevant others identified in a stakeholder mapping process

11 References

1	HSE: Our National Service Plan 2024 https://www.hse.ie/eng/services/publications/serviceplans/hse-national-service-plan-2024.pdf
2	Voluntary Work https://www.revenue.ie/en/employing-people/employee-expenses/travel-and-subsistence/voluntary-work.aspx
3	The National Volunteering Strategy (2021 - 2025) https://volunteerwestmeath.ie/2021/02/05/irelands-national-volunteering-strategy-2021-2025-launched-dec-2020/
4	Department of Public Expenditure and Reform Finance Circular 16/2022: Revised Motor Travel Rate Regulations. https://www.gov.ie/en/circular/378ca-circular-16-2022-motor-travel-rates/
5	Department of Public Expenditure and Reform Finance Circular 19/2023: Domestic Subsistence Allowance. https://www.gov.ie/pdf/?file=https://assets.gov.ie/278766/47bea6b4-ec35-497c-9664-917969a996dd.pdf#page=null
6	HSE: National Financial Regulations, V1.1.4, May 29 th 2024 https://www.hse.ie/eng/about/who/finance/nfr/nfrb4.pdf
7	Medical Card Rate link https://www.hse.ie/eng/staff/pcrs/national-medical-card-assessment-guidelines.pdf

12 Glossary of terms

<p><u>Patient and Service User Partner:</u></p>	<p>For the purpose of this policy the term ‘Patient and Service User Partner’ is used to include patients, service users, family members and carers who are invited by the HSE to collaborate in policy development, implementation and evaluation and design and delivery of services.</p>
<p><u>HSE Contact Person:</u></p>	<p>For the purpose of this policy the term ‘HSE Contact Person’ is the point of contact that has been identified by the HSE to work with the patient and service user partner to ensure the involvement experience is a positive one</p>
<p><u>Inclusion Expenses</u></p>	<p>In the context of this policy, ‘Inclusion Expenses’ are those expenses incurred outside the scope of travel, accommodation and subsistence that were incurred directly, wholly and exclusively by the patient and service user partner as a result of their requested attendance at a HSE involvement activity.</p>
<p>Patient Service User Engagement Experience Office (PSUE):</p>	<p>This is the national office with responsibility for Patient Service User Experience.</p>
<p>Voluntary Work:</p>	<p>You may pay expenses for travel and subsistence to individuals who work for your organisation on a voluntary and unpaid basis.</p> <p>These expenses are tax-free provided:</p> <ul style="list-style-type: none"> • the organisation’s functions and aims are both altruistic and non-commercial (for example, registered charities or sports bodies) • the expenses are needed only to allow the unpaid person to carry out his or her work • The expenses paid are only to reimburse the person for expenses they actually incur. <p>The payments must not be higher than Civil Service rates for repayment of travel and subsistence expenses.</p> <p>If a person receives a wage, bonus or honorarium from work for a charity or sports body, they cannot also receive travel and subsistence expenses tax-free.²</p>

13 Appendices

Appendix 1 – Patient and Service User Partner Expense Claim Form

Appendix 2 – Sample Vendor Form (National Office)

Appendix 3 – Membership of Development Group

Appendix 4 – Membership of Approval Governance Group

Appendix 5 – Implementation plan

Appendix 6 – Evaluation tool for the National Patient and Service User Experience Office.

Appendix 7 – Evaluation tool (Patient and Service User Partners)

Appendix 8 – Roles and Responsibilities of the HSE Contact and Patient and Service User Partner.

Appendix 9 – Staying Overnight and Food

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Table 1: Motor Tax rates

Table 2: Overnight allowance- Outside of Dublin

Table 3: Overnight allowance – Dublin area only

Table 4: Example of a Patient and service user partner attending a HSE Involvement activity

Table 5: Domestic day Subsistence rates

Appendix 1 Patient and Service User Partner Expense Claim Form



PATIENT AND SERVICE USER PARTNER CLAIM FOR TRAVELLING EXPENSES AND SUBSISTENCE ALLOWANCES

Name of Meeting/Group _____ Date of Meeting: _____

Please note: Claim forms that are not submitted on the day of the involvement activity must be received by the HSE within one month of the trip or at the latest within 3 months of the trip

NAME: _____ DATE: _____

TELEPHONE NUMBER: _____ EMAIL: _____

HOME ADDRESS: _____

Home Eircode	Destination Eircode	Number of Hours	Location of meeting	Distance claimed (KM)	Amount claimed for Travelling Expenses €	Amount claimed for Subsistence/Overnight Allowances €

Total Subsistence Allowance: _____

Total Travelling Expenses: _____ (Taxi fares by prior agreement and supported by a receipt)

Total Receipted Expenses: _____ (By prior agreement and supported by receipt)

Overall Total: € _____

Declaration by Patient and Service User Partner:

I declare that the information given on this claim form is true and complete to the best of my knowledge.

Where I am claiming for mileage costs I declare that this was the most direct route available

I understand that if an error in a claim I made is identified I will be required to return the relevant amount.

Signature of claimant: _____ **Date:** _____

I certify that the claimant attended the meeting(s) on the date(s) shown and that the account is correct.

Managers Name: _____ **Signature:** _____ **Date:** _____

FOR HSE USE ONLY

Verified by HSE Contact Person: _____ Date: _____

I declare that the information given on this claim form is true and complete to the best of my knowledge.

Appendix 2: Sample Vendor Form – (National Office).

NATIONAL FINANCE DIVISION-FINANCE SHARED SERVICES-PAYMENT SERVICES

CREATE VENDOR CHANGE VENDOR
 (Please tick whichever is applicable)



FOR COMPLETION BY VENDOR (PLEASE PRINT)

Name/Trading Name _____ Address line 1 _____ Address line 2 _____ Address line 3 _____ Eircode/Post Code _____ Country _____ Contact Name _____ Contact Tel No. _____ Mobile Tel No. _____ HSE/TUSLA Employee No. _____ (if employed by HSE or TUSLA)	
E-mail Address _____ *1 Remittance E-mail *2 Purchase Order E-mail (if applicable)	
*1 Remittance advice will be sent to this e-mail account. *2 Please note only one PO email address is possible per vendor. The obligation lies with the vendor to distribute POs within their own organisation.	
BANK DETAILS Country _____ Order Currency _____ BIC or SWIFT _____ IBAN _____ Account Name _____ Bank Name _____ Bank Address _____	
TAX INFORMATION (Mandatory for Suppliers and Service Providers) Tax Reference No _____ Tax Ref No Type: VAT Number: _____ (Please tick the relevant box to indicate if the Tax Reference No. provided is an Income Tax (IT) or Corporation Tax (CT) registration number) <input type="checkbox"/> Income Tax (IT) <input type="checkbox"/> Corporation Tax(CT)	
Charity no: _____ Other: _____ (if applicable)	
Vendors with payments in excess of €10,000.00 in a 12 month period MUST provide proof of tax clearance otherwise payments cannot be made. Full details are available on www.revenue.ie. Charities registered in the Republic of Ireland MUST state their Charity Number in the Charity No field above.	
<ul style="list-style-type: none"> • I certify that the details given above are correct and I understand that payments in respect of goods, work or services supplied, payments in respect of a grant or any other payment will be made to the account nominated above. • I agree to HSE Standard Terms for Services and Supplies (full details available on request or at www.hse.ie) unless otherwise agreed in writing. 	
Signed _____	Print Name _____ Date _____
Title _____	Vendor Number _____ (if known)

Appendix 3: Membership of Development Group

Name	Role and position
Ann Sheehan	General Manager, Public Involvement, Culture and Risk Management
Lorraine O’Leary	Finance Lead, Public Involvement, Culture and Risk Management
Anne Lawlor	Patient and Service User Partner
Christine Fenton	Patient and Service User Partner
Mila Whelan	National Patient and Service User Experience team
Orla O’Reilly	National Patient and Service User Experience team

Appendix 4: Membership of Approval Governance Group

Name	Role and position
Iolo Eilian	National Patient Service User Experience Lead, Office of National Public Involvement, Culture & Risk Management.
Ann Sheehan	General Manager, Public Involvement, Culture and Risk Management
Anne Lawlor	Patient and Service User Partner
Christine Fenton	Patient and Service User Partner

Sign-off by Chair of Approval Governance Group

National Policy on Reimbursement of Patient Partner Expenses was formally ratified and recorded in the minutes of the Approval Governance Group on 09/12/24

Appendix 5: Implementation Action Plan – Version 1 21/11/24

Policy: HSE National Policy on reimbursement of Expenses for Patient and Service User Partners Version 3

Implementation Lead: National Patient and Service User Experience Lead (NPSUEL)

Service: Public Involvement, Culture and Risk Management			Date: November 2024	
Actions	Key performance indicators	Dependencies and resources	Person(s) responsible for action*	Timeframe:**
Notes: * Person(s) responsible for action: role title is provided 2) Timeframe:** Completion date or Repeated action interval				
1	Submit to the National Central Repository (NCR) the: a) Submit completed National Template b) Version 3 of the HSE National Policy on Reimbursement of Expenses for Patient and Service User Partners	a) Submission to ncr.team@hse.ie b) Version 3 publicly accessible in the Policy section of the NCR	a) None b) NCR Team process	Working Group Chairperson Upon agreement from SLT.
2	Create a Communication Action Plan to include but not limited to the development of: a) A distribution list Version 1 b) Briefing papers for different stakeholder groups c) Where to share information about using the policy in daily life	a) Stakeholder list b) A group of briefing papers c) A list of where information has been shared.	a) to d) - National Communications Team	Chairperson 31/01/2025 a) 31/12/24 b) 01/02/25

Service: Public Involvement, Culture and Risk Management			Date: November 2024		
Actions	Key performance indicators	Dependencies and resources	Person(s) responsible for action*	Timeframe:**	
<ul style="list-style-type: none"> d) A variety of accessible versions of the information in the policy and briefing papers e) Facilitate engagement with the Regional PSUE offices to ensure all areas are advised of the new policy and the streamlining of payments 	<ul style="list-style-type: none"> d) A resource of accessible versions using different communication mediums e) Arrange Online Teams Training and contact email for any queries to be directed to. 	<ul style="list-style-type: none"> - Subgroup of members of the 2025 Working Group - National/Regional Partnership offices. 		<ul style="list-style-type: none"> c) 01/03/25 d) 31/03/25 e) 31/03/25 	
3	Incorporate the Communication Action Plan into this Implementation Plan Version 1	Revised Policy Implementation Action Plan Version 2: 31/01/25	Working group members	Chairperson	31/01/24
4	<p>Add an agenda item to the Forum meeting:</p> <ul style="list-style-type: none"> a) Invite the ND to attend to explain the: <ul style="list-style-type: none"> - process to date - commitment to align with Civil Service Rates - logistical issues which prevent that at the moment (cumulative travel distances) - decision made for the flat rate 	<ul style="list-style-type: none"> a) Minutes of the Forum meeting 	<ul style="list-style-type: none"> a) and b) <p>National Patient Service User Forum meeting time</p> <p>Time for Forum members of the Reimbursement</p>	a) NPSUF Chair	Forum to revert to confirm date.

Service: Public Involvement, Culture and Risk Management			Date: November 2024	
Actions	Key performance indicators	Dependencies and resources	Person(s) responsible for action*	Timeframe:**
<ul style="list-style-type: none"> - HSE projects which will inform the next policy revision - beginning the next review process on 09/01/25 - tax implications for some payments - inclusion barriers <p>b) A 'familiarity' session to highlight:</p> <ul style="list-style-type: none"> - the information in the appendices - changes from past practice - the role of the Contact Person - inclusion barriers - personal responsibilities - how Forum members can be pro-active in the implementation process 	<p>b) Minutes of the Forum meeting</p>	<p>b) Forum Members of Working Group to prepare the 'familiarity' session</p>	<p>b) NPSUF Chair</p>	
<p>a) Create a generic email which is to be used for all queries.</p>	<p>Generic email created and included in the policy</p>	<p>Finance lead</p>	<p>Finance Lead</p>	<p>Completed</p>
<p>5 Review and decision process for Inclusion Expense:</p>		<p>a) HSE tax team</p>	<p>a) Finance Lead</p>	<p>a) 30/11/24</p>

Service: Public Involvement, Culture and Risk Management			Date: November 2024		
Actions	Key performance indicators	Dependencies and resources	Person(s) responsible for action*	Timeframe:**	
<ul style="list-style-type: none"> a) Create a short explanation of inclusion payments which may incur personal tax costs b) Create an electronic log for inclusion queries c) Log all queries relating to inclusion d) Other queries received by reimbursementcultureandrisk@hse.ie Create an electronic log e) Quarterly report on inclusion to the ND, NPSUEL and Chairperson of the Policy Review Group developing Version 4 2025 Working Group to inform that revision process discussed at team meeting. 	Generic email created and included in the policy	<ul style="list-style-type: none"> b) None c) New' staff time to: <ul style="list-style-type: none"> - Receive - Process - Record inclusion queries d) Receiving queries from national and regional e) Patient Partnership Office 'New' staff time to review and develop a review report 	<ul style="list-style-type: none"> b) Finance lead c) Finance lead d) Chairperson e) Chairperson NPSUE lead 	<ul style="list-style-type: none"> b) 30/11/24 c) End Q1 – 4 2025 d) End Q1 – 4 2025 e) 01/07/25 April 25, quarterly thereafter 	
6	Evaluation Tool for the National Patient and Service Experience Office:	Report on the results of the review to include sections on patient and service user submissions	Finance lead	Finance Lead	

Service: Public Involvement, Culture and Risk Management			Date: November 2024	
Actions	Key performance indicators	Dependencies and resources	Person(s) responsible for action*	Timeframe:**
f) Review ten claims received by Patient Partnership Office against the criteria in Appendix 5.	<ul style="list-style-type: none"> - new patient and service user bank details - processing of claims - Contact person's role - Points arising from the review 			
<p>Evaluation of Policy by the National Patient and Service User Forum:</p> <p>g) Review ten member claims received by Patients Partnership Office against the criteria in Appendix 6</p> <p>7 Review ten member claims received by Patient Partnership Office against the criteria in Appendix 6</p> <ul style="list-style-type: none"> - Review the implementation of the policy and the changes in process reporting on the experience and thoughts of NPSU Forum members 	<p>Report on the results of the review to include sections on:</p> <ul style="list-style-type: none"> - patient and service user submissions - new patient and service user bank details - processing of claims - Contact person's role - Points arising from the review 	NPSUF Agenda item	NPSUF Chair	01/07/25

Expected outcomes of Implementation Plan. HSE National Policy on Reimbursement of Expenses for Patient and Service User Partners Version 3

1. Version 3 of the policy is located in one place on the, National Central Repository which is available to patient and service user partners, staff and stakeholders
2. Increased efficiency in the claims process for patients and service users
3. Increased ease of claiming for patients and service users
4. Documented list providing access to a network of people, patients, service users, staff, stakeholders and services the policy applies to
5. National Patient and Service User Forum members:
 - 5.1 Understand what they may claim for, how to claim
 - 5.2 Share information about the policy, particularly the 'what to do' style Appendices, with their networks
 - 5.3 Are integral to the implementation, monitoring and evaluation process
 - 5.4 Report their collated experiences into the next Review process
 - 5.5 The profile of patient and service user partners moves towards pro-active and integral to the implementation, monitoring and evaluation process
6. A data set of queries about inclusion received to reimbursementcultureandrisk@hse.ie
 - 6.1 The Health Regions and services they are being received from
 - 6.1.1 identification of Health Regions from which no contacts about inclusion have been received
 - 6.2 The content of queries received including the:
 - 6.2.1 decision-making criteria discussed
 - 6.2.2 decisions made and documented
 - 6.2.3 number of inclusion requests been received from all parts of our HSE

The sample data set will enable questions to be derived from the data which will be used to inform the 2025 policy review process

Appendix 6: Evaluation tool for the National Patient and Service User Experience Office:

Methodology

Population: A sample of target users

Sampling: A total of 10 target users.

Frequency: Annually.

Method: Record **Y** for **Yes**, if the criteria are met. Record **N** for **No**, if criteria are not met or **N/A** for **Not applicable**.

Compliance requirement: 100%

Is standard/criteria being met for the following statements:	Yes	No	N/A	Evidence
<p>The Development Group should identify the core statements that should be audited at least annually.</p> <p>Statement 1 Are patient and service user partners being paid the appropriate rate for travel?</p>				
<p>Statement 2 Is a meeting being held with the patient and service user partner to consider costs and agree plan for attendance at meetings?</p>				
<p>Statement 3 Are claims for Inclusion expenses being considered through the National Public Involvement, Culture and Risk Management Finance Lead?</p>				
<p>Statement 4 Are claims being submitted within the approved timeframe?</p>				
<p>Statement 5 Is approval being sought for expenses before they are incurred?</p>				
<p>Statement 6 Are claims forms being completed in line with policy guidelines and receipts submitted?</p>				
<p>Statement 7 Are expenses forms being correctly stored and available for audit review at any time?</p>				
<p>Date of Audit: Audited by (name/title): Compliance Rate %:</p>				
<p>Calculation of Compliance Rate %: The score, expressed as a percentage, is calculated by dividing the number of “yes” and “no” answers. “Not applicable” answers are excluded from the calculation of the percentage score. Example: If there are 6 “yes” and 2 “no” answers, the score is calculated as follows: 6 (yes answers) divided by 8 (total of yes and no answers) multiplied by 100 = 75%</p>				

Appendix 7: Evaluation Tool - Patient and Service User Partners

Methodology

Population: A sample of target users

Sampling: A total of 10 target users.

Frequency: Annually.

Method: Record **Y** for **Yes**, if the criteria are met. Record **N** for **No**, if criteria are not met or **N/A** for **Not applicable**.

Compliance requirement: 100%

Is standard/criteria being met for the following statements:	Yes	No	N/A	Evidence
<p>The Development Group should identify the core statements that should be audited at least annually.</p> <p>Statement 1 Have you been given the details of the HSE Contact Person</p> <ul style="list-style-type: none"> - Name - Email - Mobile 				
<p>Statement 2 Have you been provided with the contact details of 'back up' contact person?</p>				
<p>Statement 3 Have you been given the Eircode of the place where the meeting is taking place?</p>				
<p>Statement 4 Have you agreed a plan with your contact person for attending meetings and do you understand what expenses will be reimbursed to you?</p>				
<p>Statement 5 Are your claims been processed in a reasonable time? (Within one month of being submitted)?</p>				
<p>Statement 6 Do you know who to contact if you want assistance in submitting your expenses?</p>				
<p>Date of Audit: Audited by (name/title): Compliance Rate %:</p>				
<p>Calculation of Compliance Rate %: The score, expressed as a percentage, is calculated by dividing the number of "yes" and "no" answers. "Not applicable" answers are excluded from the calculation of the percentage score. Example: If there are 6 "yes" and 2 "no" answers, the score is calculated as follows: 6 (yes answers) divided by 8 (total of yes and no answers) multiplied by 100 = 75%</p>				

Appendix 8 Roles and Responsibilities of the Contact Person and Patient and Service User Partner.

A) HSE responsibility:

When the HSE Contact Person sends an invitation to a patient and service user partner confirming their invitation to join the project by email or letter they should also provide the following information:

- 1) The name of the contact person taking responsibility for patient and service user partner involvement
- 2) Their contact details
- 3) The name of the:
 - a. service which sent the invitation
 - b. the project
- 4) Explain who the patient and service user partner contacts to ask questions if the contact person is not available so there is a contact system.
- 5) The contact person should then arrange a meeting with the patient and service user partner to:
 - a. Discuss any likely costs that the person may incur in attending meetings.
 - b. Explain how to claim for expenses for travel and subsistence, including overnight and food
 - c. Check if this is the first time the person will be making a claim or if they have claimed before.

If this is their first claim, the contact person will ask for bank account details.
A 'vendor' form is used to document this detail.
The Vendor Form is used to add the person to the HSE system so their payments can be processed.
 - d. The contact person will provide this to the finance administrator for their area so the person is set up on the HSE system.
- 6) The contact person must then seek approval for the reimbursement of costs.
- 7) Once approved, the contact person will tell the patient and service user in writing what has been approved and provide a copy of the claim form and an addressed envelope with the following details filled in:
 - a. The name of the service
 - b. The Eircode of the venue for the meeting
- 8) On receipt of a completed form, the contact person will review and approve as appropriate and forward onto the finance administrator to process payment.

B) Patient and Service User Partner Responsibility

Before travelling:

- 1) Check you have the name and contact details of the person who invited you to join the project
- 2) Have a chat with your HSE contact person to discuss and agree:
 - how you are going to travel if public transport is not a reasonable option
 - any other costs that you anticipate are necessary for you to take part which
- 3) Make sure you have received email or a letter from your contact person stating that the travel plans and any overnight stays you discussed and agreed together are confirmed.
- 4) Check you have been given the Eircode of the place the meeting is taking place.
- 5) Keep all of your receipts
- 6) If traveling by car, motorbike or bicycle you can calculate the journey distance in kilometres through the internet. If you need assistance with this ask your HSE contact person.
- 7) You may have to pay for tolls and car parking.
 - a. Keep your receipts for these and any other expenses as agreed with your contact person.
- 8) Complete your claim form and submit this with the relevant receipts. You can submit your claim by:
 - a. Posting it in
 - b. Hand delivering it at the end of the meeting
 - c. By email
- 9) If you are on a few different groups, it is a good idea to keep a track of what you submitted and when so you can match it against payments you receive.

Please see below Checklist which may assist you in submitting travel expense claims.

Reimbursement checklist:

	Project Name:	Place:	Date:
	I have	Notes	Yes/No Date
1	Been given the details of the Contact Person - Name - Email - Mobile - Backup contact person		
2	Been given the Eircode of the place the meeting is taking place		
3	I have agreed a plan for attending meetings and understand what I can claim reimbursement for		
4	I chose to talk about my needs with the contact person and discussed how these affect how I plan and manage travel, food and overnight stays		
5	I have received an email or letter confirming the travel/overnight details the contact person and I discussed and agreed on		
6	I have all the receipts for : a) Travel b) Food c) Overnight stay d) Tolls		
			a)
			b)
			c)

	e) Car Parks		d)
			e)
7	I received (by post or on the day of the meeting) an addressed envelope and the Claim Form to fill in		
8	The Claim Form I was given has the name of the Service and the Eircode of the place the meeting is at filled in		
9	I was able to get assistance to work out the kilometres I travelled when using my own car/motorbike/bicycle		
10	I have filled in the Claim Form Appendix 1		
11	I was able to access the assistance I needed		
12	I have taken a photograph of my receipts 'just in case'		
13	I submitted my Claim Form and Receipts in the format that best suits me		
14	I know who to contact if I want to check my Claim Form arrived and is being processed		
16	I know who to contact if I have not received my expenses within 30 days of the HSE receiving it		
17	The payment arrived		

Appendix 9: Staying Overnight and Food

Subsistence includes the payments for overnight accommodation and food.

Please discuss these with your HSE Contact Person

There are different rates for:

- Staying in Dublin and food
- Staying outside Dublin and food

Staying in Dublin:

If you have received approval to stay in Dublin you may claim for €195 to cover Bed and Breakfast

Depending on the time you are away from your home you may be approved to claim an additional amount of up to €42.99 to cover the cost of two meals.

Table 3: Overnight allowance – Dublin area only

Domestic overnight subsistence rates (from 14 December 2023) – Dublin Area Only		
Rate Category	Rate	What this Rate Includes.
Dublin Hotel Allowance	€195.00 Allowance For Hotel Stay (B&B Rate) & An additional amount of € 42.99 for Subsistence may be claimed.	This Rate of €195 covers Hotel Stay (B&B) only. A Subsistence amount of €42.99 may also be claimed for a 10 Hour stay. A copy of Hotel Bill and Receipts for Subsistence MUST be provided and submitted with the claim.

Staying outside Dublin:

You may claim up to €195 to cover Bed and Breakfast and all other costs relating to meals.

No additional expenses can be reimbursed above €195.

Table 2: Overnight Allowance –Outside of Dublin Area.

Domestic overnight subsistence rates (from 14 December 2023) – Outside of Dublin Area		
Rate Category	Rate	What this Rate Includes.
Normal Rate	€195 .00	This Rate covers your Hotel Stay (B&B Rate) and the cost of 2 Meals. A copy of Hotel Bill and receipts for subsistence MUST be provided with submitted claim. <u>***Any Hotel and Subsistence Costs over the approved rate of €195.00 will not be refunded and must be borne by the</u>

		<u>claimant.</u>
<u>Reduced Rate</u>	€175.50	<u>Non - Applicable</u>
<u>Detention Rate</u>	€ 97.50	<u>Non - Applicable</u>

Overnight

Overnight allowance



Things to consider when you are booking an overnight stay

You will need a credit card to confirm your booking

Some hotels have an arrangement with our HSE and have a Corporate Rate.

If there is a Corporate Rate there will be a limited number of rooms the hotel has available at this rate.

- Early booking is a must to get the best rates and at busy times of the year late booking increases the chance that the rate will be higher than can be reimbursed.
- Remember: You are responsible for any cost above the rates given in the tables below.

When booking:

- 1) Ask if there is a Corporate Rate, explain you are attending an HSE meeting.
 - Sometimes the hotel will ask for an HSE staff member to confirm the booking is for an HSE meeting.
 - In this case ask your HSE Contact Person to contact the hotel.
- 2) Ask:
 - a) If there are any promotions
 - b) What the standard rate is (sometimes this is cheaper than the Corporate Rate)
 - c) Choose the cheapest rate
- 3) If you need an adapted room, have a preference for a bath or a shower or a room large enough for mobility equipment confirm that when booking.
Please discuss this with your Contact Person.
- 4) When booking let the hotel staff know if, in case of fire or evacuation, you will need assistance.
Please discuss this with your Contact Person.
- 5) If you are staying with a Carer or PA the hotel usually adds an additional rate for dual occupancy. Please discuss this with your Contact Person.

- 6) If you are driving or are being driven to a hotel check if the hotel has a car park, the cost and the height of vehicles it will take.

Some hotels have another car park with a limited number of vehicles which is used for tall delivery vehicles and if asked will do their best if your car needs to be parked in this area.

- Check with your Contact Person that the meeting venue has accessible parking for your vehicle

- 7) Checking in

Remember:

- a) Confirm the specific needs you stated when booking have been met, for example your preference for a bath or a shower. A room large enough for mobility equipment
- b) The hotel may be able to provide a mini fridge or fan on request
- c) The hotel will provide assistance to take your luggage to and from your room

- 8) Checking out

Make sure you ask for your receipt to include:

- a) The overnight stay
- b) Food
- c) Car Parking

Appendix 10: Travel costs

All travel plans must be authorised by your HSE Contact Person before travelling.

People attending meetings with HSE staff may claim travel costs but there are conditions.

- 1) You are expected to use Public Transport, bus, train, Luas.
- 2) Taxis may be authorised at the discretion of your HSE contact person.
Please discuss this with your Contact Person when planning your journey.
- 3) Parking and toll costs may also be paid.

Travel Rates you can claim when using a car, motorbike or bicycle:

Using a car	43.4 cents a kilometre
Using a motorbike	23.55 cents a kilometre
Using a bicycle	8 cents a kilometre

Patient and service user partners are expected to use public transport or the most cost effective, environmentally friendly form of transport where practical.

If you are planning to use a private vehicle where public transport was available the amount of costs reimbursed must not exceed the cost of public transport (including other passengers attending an HSE involvement activity).

Some people cannot use public transport or there is none.

Please discuss your plans with your HSE Contact Person.

Using Public Transport

If you are using public transport ask for a receipt as your costs cannot be reimbursed without one.

What can be reimbursed?

- Bus fares
- Train fares
- Taxi fares (make sure you have received written approval for this)

Cancelled involvement activities

If an involvement activity has been cancelled at short the HSE will reimburse travel costs incurred as long as the patient or service user partner was not informed of the cancellation before travelling.

Are you on the road legally?

It is your responsibility to make sure that a private vehicle you use to travel to an involvement activity is on the road legally and that the driver has a valid licence.

Appendix 11: Further information and Frequently Asked Questions



Do You Know?

- 1) If you have a Disabled Parking Permit some car parking areas do not charge.

Contact: <https://www.iwa.ie/services/motoring/disabled-parking-permits/>

It is important to check before travelling if the place you plan to park charges for Permit Holders or not.

- Suggest: contact the Local County Council or Car Park owner, ask for confirmation by email
- Remember: You are liable for any fines received.

- 2) If you are using a certified disability modified vehicle you can apply for a disc which means you do not pay for tolls.

The Disability Toll Exemption Scheme (DTES) was set up by TII in 2019 to allow Disability Modified Vehicles to be exempt from tolling charges on Irish toll roads. From February 2020, a registered disability modified vehicle will not be liable to pay toll charges at any toll plaza nationwide.

Contact: <https://dtes.ie/dtes-scheme/>

- 3) If you are a mobility equipment user and are booking a taxi, (make sure you have received email/written authorisation before booking) check in advance that:

- a) Your wheelchair or mobility scooter is suitable to be in when travelling
- b) That the taxi which is ordered is made aware that you can/cannot travel in/on your equipment.

Example: A mobility scooter user was travelling with two other people to a meeting.
Three people needing three seats.

- The taxi arrived and could seat only two passengers and one person sitting on the mobility scooter.
 - The mobility scooter was not equipped for a person to sit on when travelling.
 - The choices were to not travel safely or to request a suitable taxi.
- Make sure that your Contact Person is aware of the regulations regarding safe travel and that if they book a taxi for you that it is safe and appropriate for your needs.
- <https://www.rsa.ie/road-safety/road-users/vehicle-components/vehicle-components/seatbelts-and-child-restraints/wheelchair-restraints#:~:text=Wheelchairs%20must%20be%20securely%20attached,is%20likely%20to%20be%20caused.>