

Social Services Directorate

Financial Procedure

Reimbursement of Carer (Service User) Expenses. (Including the Carers Involvement Framework)

Context

Introduction

Carer and User involvement is critical in the development, and monitoring of services. It is also key for Social Services and Health in meeting a number of performance targets.

Ensuring that carers or service users are promptly reimbursed for any expenses is both good practice and essential in ensuring good attendance at meetings and events. This procedure offers a simple way of ensuring expenses can be paid to carers (or users) on the day that expenses are incurred, in a consistent way across Social Services in Devon.

(Work is currently being undertaken locally, regionally and nationally and across a number of agencies on reimbursement and payment to carers and this procedure may be subject to change)

The process outlined could also be used for service user meetings and consultation events

Which events and meeting are eligible for reimbursement?

Potentially any meeting/event which is arranged by Social Services or on their behalf, where carers views are sought or their participation required. These may be one off consultation or training events or ongoing groups. Guidance on eligibility for payment is as follows.

Carers are eligible to claim reimbursement of their costs, if they attend:-

- meetings where they have been invited by name to attend
- meetings where they have been invited to act as a representative for an appropriate group or organisation.
- joint staff/carers training events or ones targeted at specific carers by SSD such as chairing and interview skills.
- in a formal role within the organisation, for example on an interview panel, or as a co trainer.
- their Generic Locality Carers Forum/Management Group or the Generic County Carers Forum/Steering Group or other similar groups within the divisions.

The following circumstances would **not** ordinarily attract reimbursement but exceptional arrangements can be made at local manager discretion, and this should be made clear when the event is publicised.

- Open meetings where individual invitations have not be made.
- Where consultation is conducted through a questionnaire or home visits.
- Those representing organisations which would ordinarily provide reimbursement for attending meetings.
- Training events which are primarily for the personal development of the carer.
- Any meeting about the service user or carer's own individual circumstances, such as care planning meetings or reviews, case conferences, etc.
- Carers are those described in the Carers Recognition and Services Act 1995 and do not include foster carers, paid care workers or parents of children under 18 other than those children who have a recognised disability.

The procedure does not replace any current arrangements which Divisions may have with other organisations who set up and run events and who would ordinarily make reimbursement payments to carers/users attending.

The procedure can be used for joint agency events providing the appropriate SSD/Joint Agency Manager agrees and any other appropriate reimbursement policy is taken into account if there is one.

What costs are covered?

Any actual cost incurred by the carer in order to enable them to attend a meeting can be reimbursed and this will normally be limited to travel expenses and substitute care costs where appropriate.

- Carers should be encouraged to use public transport where possible to attend events and meetings and should be asked to submit appropriate receipts
- If a car is used appropriate mileage rates will be reimbursed. This is currently 0.40p per mile which is the maximum allowance permitted by the Inland Revenue before being subject to taxation.
- Where taxis are to be used this should ideally be agreed in advance.
- Where substitute care costs are being paid this should ideally be agreed in advance.

- Where receipts are not available claims can still be processed providing the authorised officer satisfies themselves that the claim is legitimate.

Note Only reimbursement of costs incurred can be paid through this system. Any payment for the carers time or payments in kind to thank them for the time they have given could effect the person's taxation and benefits entitlement and should not be paid using this procedure.

Does this process fit with other agencies?

There are many reimbursement agreements in place throughout PCT's, Trusts and other organisations such as PALS. The principals here reflect many of these and the payment of mileage is in line with most. (E.g. The Devon Partnership Trust, PPI meetings, NHS across the SW Peninsula)

The procedures can sit alongside arrangements in place in joint agency teams such as the Devon Partnership Trust, but be aware some will also have a policy and procedure on payment to carers in recognition of their time in addition to a reimbursement process.

Phil Dyson, Carers Support Team – December 05