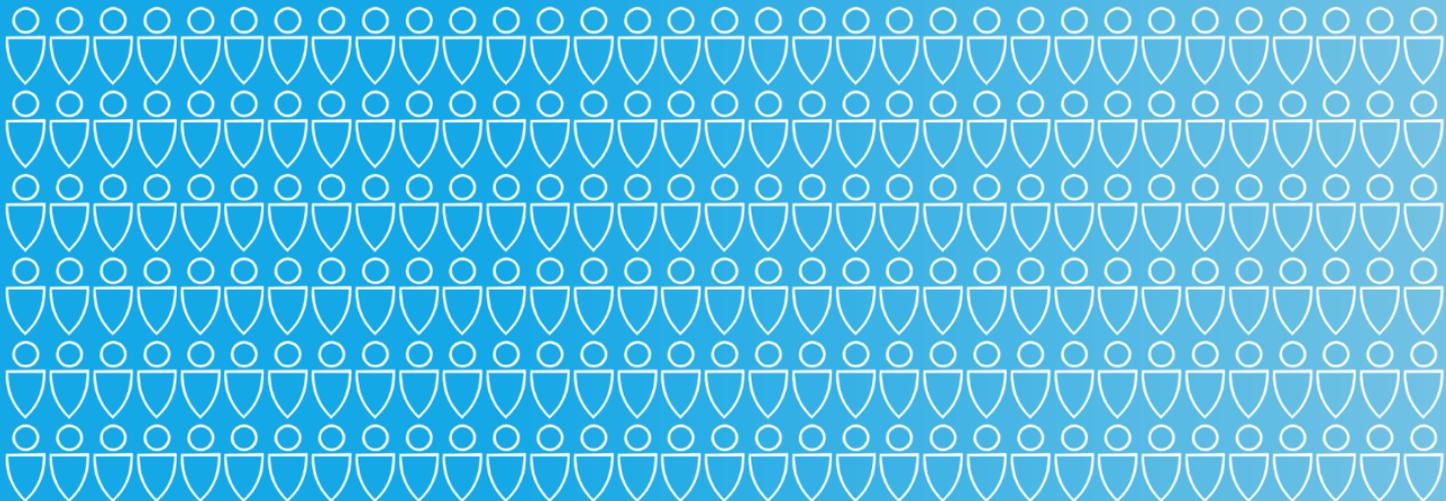


# Expenses Policy

June 2021



**Falkirk  
Health and Social Care  
Partnership**

## Document information

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## Who is the expenses policy for?

This policy is for unpaid carer and service user representatives who are appointed as members of the Falkirk Health and Social Care Partnership Integration Joint Board (IJB) as per the Standing Orders 3b), c) and d) and any associated groups or committees.

## Why does this expenses policy exist?

This policy ensures that any unpaid carer and service user representatives, and their deputies, who are members of the IJB and associated sub-groups or committees are not out of pocket when carrying out their duties (as defined in the Public Bodies (Joint Working) (Scotland) Act 2014).

## When does this expenses policy apply?

This expenses policy applies to enable unpaid carer and service user representatives and their deputies to undertake the work required in their capacity as IJB members. This includes preparatory work for, and attendance at:

- IJB meetings (including workshop and development sessions)
- Strategic Planning Groups
- Locality Groups
- Other associated groups or committees
- IJB related duties and events (e.g., meeting a community group to explain the Strategic Commissioning Plan)

## What expenses are included in this policy?

The following is included, but prior approval must be sought before any expense is incurred:

### Travel costs:

- Public transport (excludes first class travel – receipts to be provided)
- Mileage (45p/mile)
- Parking (receipts to be provided)
- Taxi costs – where public transport arrangements are not suitable (receipts to be provided)

### Subsistence (where no meals or refreshments are provided):

- Reimbursement of reasonable lunch expenses as per current Local Council guidelines (receipts to be provided).
- Reimbursement of reasonable dinner expenses as per current Local Council guidelines (receipts to be provided).
- Overnight accommodation and reimbursement of reasonable expenses for overnight stays, if required, as per current Local Council guidelines (receipts to be provided).

### Preparatory work and administration to carry out duties:

- Printing and paper costs
- IT/communication costs (e.g., phone/iPad/laptop), although a Council-owned laptop or tablet will normally be loaned for the period of tenure.

NB: there will be a requirement to agree to abide by the relevant policies in relation to the use of IT equipment, data protection, etc.

#### Replacement care/care cover:

- For attendance at IJB meetings
- For attendance at other meetings/events relating to role
- For travel times to meetings
- For preparation time (if required - to be discussed and agreed in advance)

#### Loss of income to attend meetings:

- Where appropriate, loss of earnings income to attend IJB meetings will be considered (to be discussed and agreed in advance).
- Any potential impact on social security benefits to be considered and discussed.

## What is the process for claiming expenses?

A named contact person will be identified to support communication, completion and agreement of all expenses claims. This will normally be the meeting chair or event organiser.

Expenses forms will be provided in electronic or paper format before or at each meeting/event to claim travel and subsistence expenses (receipts to be provided). A copy of this form is available to view on the Partnership's website at [www.falkirkhscp.org/publications](http://www.falkirkhscp.org/publications)

For preparatory and administrative costs, reimbursement of costs as spent.

For replacement care reimbursement, discussion and agreement with meeting chair or organiser in advance. The process for replacement care costs is explained in Appendix 1.

All expenses will be paid in accordance with normal expense processing deadlines following receipt of a properly completed expenses claims form. However, to ensure equity of involvement and engagement, if required immediate or advance payments may be made. This will need to be agreed in advance. A payment schedule with dates of reimbursement will be provided.

Payments will be made via BACS transfer where possible. Bank details will be required to enable payment. Where BACS payments are unsuitable, alternative payment arrangements (such as cheque/cash) can only be agreed by the Chief Finance Officer.

Travel expenses can be paid upfront. There is no fast track payment available for care provision. Care providers will be added to the finance system as a supplier and will be paid if payment is authorised.

Pre-paid cards are being considered to cover travel expenses and care provider costs.

## Reviewing this policy

This policy will be reviewed annually with the relevant recipients. Any proposed changes to this policy will be discussed with those covered by the policy before implementation.

## Appendix 1. Expenses Process

### Replacement care and support costs (unpaid carer representatives)

1. If an unpaid carer has an existing support package, then we will increase hours in their support as required. Carers will need to provide notice and cost to be agreed upon, depending on the level of support required.

a) If they have SDS Option 1, then replacement care costs will be made via direct payment.

b) If they have SDS Option 2 or 3, then replacement care costs will be made via invoice from the care provider.

An amount to cover replacement care costs can be agreed upon in advance for the year or each quarter.

2. If an unpaid carer has no regular support, then an Adult Care Support Plan may be needed to establish their needs. This will be supported by the Carers Centre. If care is not required but the person can't be left alone, a befriending service may be more suitable. This will be dependent on the needs of the cared for person.

SDS Forth Valley can help identify a suitable care provider. They can provide the unpaid carer with a list of care providers in their area and provide support to enable the carer to contact their preferred provider and make the necessary arrangements with the provider.

It is advised that the carer only use one provider for when care support is required, rather than approach different providers each time that support is needed as a lot of providers are not open to ad hoc support provision.

As support would be on an irregular and ad hoc basis, the unpaid carer would have to give as much notice as possible for the arrangements to be made well in advance of meetings to secure the support required.

The cost of replacement care and support will need to be agreed upon in advance and payment can be made via direct payment or via invoice from the care provider.

#### **Carers Centre**

Email: [centre@centralcarers.org](mailto:centre@centralcarers.org)

Tel: 01324 611510

#### **SDS Forth Valley**

Email: [Info@sdsforthvalley.org](mailto:Info@sdsforthvalley.org)

Tel: 01324 408794

### Care and support costs (service user representatives)

1. This will depend on the service users care and support needs and whether they have an existing support package in place or require ad hoc support. This process follows the same process as unpaid carer representatives (see above).

The cost and level of care and support required will need to be agreed upon in advance.

If a paid worker is not required and an unpaid carer is attending the meeting to support the service user, then any unpaid carer's expenses will need to be reimbursed using the expenses claim form.



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