GIG CYMRU NHS WALES

Addysg a Gwella Iechyd Cymru (AaGIC)

Health Education and Improvement Wales (HEIW)

HEIW policy on practice-based learning expenses for pre-registration commissioned healthcare programmes

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Foreword

This HEIW policy on practice-based learning expenses is intended for education providers, and relates to commissioned pre-registration nursing, midwifery, allied health profession, healthcare science, physician associate and dental hygiene and therapy programmes.

Education providers are asked to ensure this policy is referred to as part of organisational marketing for selection and recruitment purposes, during student induction processes and throughout the course of healthcare programmes.

This policy is endorsed by Health Education and Improvement Wales.

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1. Introduction

Practice-based learning[1] is an essential and significant element of all healthcare programmes. This document details travel, accommodation and related expenses that students can claim when undertaking the practice-based learning component of commissioned nursing, midwifery, allied health, healthcare science, physician associate and dental hygiene and therapy programmes.

2. Practice-based learning context

As a Special Health Authority, HEIW is set up to address strategic and specialist workforce issues across Wales including the commissioning of healthcare education.

This practice-based learning expenses policy takes account of HEIW education provider contract specifications that require practice-based learning to take place predominantly within Wales.

There is acknowledgement of occasions where some practice-based learning may occur outside of Wales, such as where equivalent specialist services may not be available. However, education providers must alert HEIW to such circumstances before allocations are made, should there be travel or accommodation funding implications. Elective placements cannot be considered for travel and accommodation expenses.

Also, whilst ‘distance’ in accessing placements can infer the rurality of Wales, there is a recognition that access issues can arise over shorter distances yet impact on journey times, where for example, several changes of public transport may be required, or where temporary accommodation is unavailable.

[1] The term ‘practice-based learning’ is used interchangeably with ‘placements’ in this document.

3. Who is entitled to claim expenses?

All pre-registration students enrolled on HEIW commissioned healthcare programmes in Wales (nursing, midwifery, allied health and healthcare science, physician associate, dental hygiene and therapy programmes) are entitled to claim relevant placement expenses via their education provider as set out in this document. This guidance applies to all commissioned students, not only those students who have opted for the NHS Wales Bursary Scheme.

Students who are undertaking a healthcare education programme whilst employed within Health Boards in Wales should claim travel expenses through their employer, with the employer then claiming reimbursement from HEIW.

All students must claim the NHS Employers Mileage allowances: Reserve rate (previously known as public transport rate). HEIW will defer to this figure. NHS Wales will review these rates each May and November using the latest information on motoring and business costs.

4. Placement related student travel claims

Travel claims must relate to compulsory periods of practice-based learning activity allocated by approved education providers as a part of HEIW commissioned healthcare programmes. HEIW cannot fund placement costs for non-compulsory programme elements.

Students cannot claim expenses for travel to their education provider base.

For students who are funded through the bursary system or student finance the 'base' is considered the usual education provider site. The 'base' is considered to be the campus where a student's programme is delivered.

For NHS/ independent sector employees who are supported to undertake pre-registration programmes funded by their employer and HEIW, the 'base' is considered to be the student's workplace.

4.1 Travel expenses to and from placement sites

4.1.1 General principles

Wherever possible, education providers should encourage safe and prudent schemes for students to share transport to and from placements. There must also be consideration of the most direct routes available when planning journeys to and from placements.

Students can use a motor vehicle including their own car to travel to placements (see section 4.1.4.1).

When traveling by public transport, students can claim the cost of these fares. Where the purchase of a monthly/weekly pass is cheaper than paying a daily return journey rate for the duration of the placement, the full monthly/weekly amount of the pass must be reimbursed.

Students will need to keep all receipts (i.e. bus/train tickets) or screenshots of expenditure using train travel apps and submit these with their claim form as proof of the journeys they have undertaken. Bank statement checks are also permissible. All students should use the cheapest form of transport available for their journeys, taking full advantage of any vouchers or concessionary schemes such as the 'my travel pass' https://www.gov.wales/1-bus-fares-young-people-september.

Part-time non-employed students are entitled to the same practice placement expenses as full-time students.

Travel and accommodation costs associated with placements outside of Wales cannot be claimed without prior discussion with HEIW (please refer to section 6.3).

4.1.2 Travel claim rates

Travel claim rates are benchmarked against the NHS Employers Mileage allowances: Reserve rate (previously known as public transport rate). It is recommended education providers monitor any changes to the Reserve rate and notify students of any change.

Expense claims can only be made where the daily commute exceeds the usual home to base distance.

It is recommended that education providers share this rule with students prior to entry onto their programme so that they can plan their finances accordingly. *'Google Maps route planner'* must be used to calculate travel time.

Example A:
Term-time residence to the 'base' = £5.00 per day
Term-time residence to the allocated placement site = £4.00 per day.

No claim is allowed as the cost of travelling to the placement does not exceed the normal daily travel costs to the 'base'.

Example B:
Term-time residence to the 'base' = £6.00 per day
Term-time residence to the allocated placement site = £10.50 per day

A claim of £4.50 per day is allowed. As the cost of travelling to the placement is greater than the normal daily travel cost, the difference between the two amounts can be claimed.

Example C:
Term-time residence to the 'base' = £6.00 per day
Term-time residence to the allocated placement site = £6.00 per day

No claim is allowed as the cost of travelling to the placement does not exceed the normal daily travel costs to the 'base'.

Example D:
Daily travel to usual place of study = 35 miles per day
Onward community mileage + mileage to and from placement site = 25 miles per day

No claim is allowed as it is not more than normal daily travel.
Example E:
Daily travel to usual place of study = 35 miles per day
Daily travel to placement site + onward community mileage = 40 miles per day

A claim of 5 miles per day is allowed.

4.1.4 Transport type

4.1.4.1 Motor vehicles

If students use their own motor vehicle, they can claim these mileage costs. Wherever possible, students must always use the most direct route available when travelling to and from their placement.

It is the student's responsibility to obtain confirmation from their insurers that they have adequate cover for all risks associated with the use of the motor vehicle whilst travelling to and from the placement. This should also cover carrying any passengers if the student is taking other students with them.

Students travelling by private motor vehicle should be made aware that they are doing so at their own risk. The provision for reimbursement of the costs of travel by private motor vehicle does not constitute any acceptance of liability by their education provider, Health Education and Improvement Wales (HEIW), NHS Wales Shared Services Partnership (NWSSP), Students Awards Services, or any other NHS body for the risks arising from the use of the private motor vehicle concerned.

Students who have the use of a mobility car are expected to use this to travel to and from practice placements and claim at the NHS Employers Mileage allowances: Reserve rate.

If a student will also be driving other NHS funded students to the placement site, they may claim an extra amount per mile at the NHS Employers Mileage allowances: Passenger allowance rate for each additional student. These students must also be eligible to claim placement travel expenses, and the driver must be insured to carry passengers. Passenger details will need to be provided.

Mileage cannot be claimed if a family member or partner drives the student to and/or from practice placements.

4.1.4.2 Taxis

Taxis are not allowed without prior approval by HEIW. The use of taxis can be considered where this otherwise negates the need to provide accommodation that would be more costly or where it may be cheaper for students to travel together to a placement site.

HEIs must escalate issues to HEIW on an annual basis where access to placement sites is problematic, and the use of taxis may be routinely required.

Taxis may be used by the education provider in 'extreme circumstances.' Examples include where a student may be 'stranded' such as where public transport has been cancelled or significantly delayed, or where a student's car has broken down, and they are unable to call on any other form of transport assistance yet are still required to attend an early or late shift start or are travelling late at night after a shift has ended. HEIW will support taxis in these circumstances without retrospective approval. However, HEIW should be notified on a monthly basis of all taxis used in emergency situations to monitor trends.

Where taxis are used but do not meet the threshold of 'extreme circumstances', the student will be reimbursed at the NHS Employers Mileage allowances: Reserve rate if they are eligible for travel expenses above and beyond their home to base mileage. HEIW will not require retrospective approval for these circumstances.

The education provider must provide evidence of circumstances where taxis are the most appropriate form of transport, given issues that may have arisen and that the use of taxis was unavoidable. An email or letter confirming agreement a student is able to use a taxi is acceptable as an audit trail for the HEIW panel. Receipts should always be submitted with these claims.

The cost of air fares, refreshments, sleeper berths, phone calls and any other expenses which may be related to a student's placement will not be reimbursed.

4.1.4.3 Minibuses

The use of minibuses can be considered where this otherwise negates the need to source accommodation that would be more costly, whilst students are undertaking allocated placements, and/ or where it may be cheaper for students to travel together to a placement site.

HEIs must escalate to HEIW on an annual basis where access to placement sites is problematic, and the use of minibuses may be routinely required. The facilitation of the use of minibuses will need to be managed by the education provider.

4.1.4.4 Motorbikes

Where students use a motorbike to access a placement these costs will be reimbursed at the NHS Employers Mileage allowances: Motor cycle rate.

4.1.4 Checking mileage routes

To confirm that a student is claiming the correct mileage for their practice placement journey, claim forms must state the *'Google Maps route planner'* tool used and note this on the claim form along with details of any change in the route taken e.g. due to road works/ closures.

HEIW does acknowledge that the shortest route may not always be the safest route and will consider claims that are accompanied by relevant mitigation (see section 5.2).

4.1.5 Car parking and tunnel/bridge tolls

Students may claim back the cost of car parking and tunnel/bridge tolls if, combined with their mileage, this makes the daily cost exceed the usual daily cost to their 'base'. Where this is the case, students can make a claim for the difference.
Receipts (electronic or paper) must be supplied by the student to claim these costs.

5. Placement related student accommodation claims

5.1 Accommodation costs

If a student must live away from their usual term-time address during a practice placement, they may claim the cost of any temporary accommodation on or near their placement site if it is not practical for them to travel there from their usual residence each day in less than an hour. Students will need to continue to meet the costs of their usual term-time accommodation whilst on placement.

Accommodation costs will only apply to the periods when students are allocated to a placement by their education provider. As a test of reasonableness, accommodation can be considered if a student is required to travel for more than one hour from their 'base.' 'Google Maps route planner' should be used to calculate travel time. Where possible, a start time should be provided for more accurate calculation.

It is recognized that student travel to some allocated placements in more rural settings of Wales can involve journeys using officially designated 'unclassified local access roads.' Unclassified local access roads are deemed to be public roads, often in rural or less populated areas, that are not assigned a specific classification by a national or local authority (Department of Transport 2012).

Where an education provider can demonstrate these routes are essential to attend an allocated placement, HEIW will consider requests for accommodation on a case-by-case basis where the journey is under an hour. Any of these regular, known routes should be identified by the education provider, and be agreed by HEIW at the beginning of each academic year.

Temporary accommodation sourced by education providers or booked directly by students should meet minimum safety standards. Minimum standards are deemed to relate to personal safety, religious or cultural requirements. Where there may be safety concerns raised, HEIW will consider those circumstances through the panel.

Placement accommodation costs will be reimbursed for the whole of the placement period, whichever allocated shift pattern a student follows.

Accommodation costs do not apply if a student's temporary placement accommodation is their parental, family, or own home.

Students may claim the cost of one weekly return journey between their temporary placement accommodation and their usual term-time residence.

Education providers can book and pay accommodation costs on behalf of a student and reclaim direct from HEIW.

5.2 Accommodation rates

Accommodation costs can be claimed up to £65 per night [2]**.** If it is not possible to source accommodation at this rate, education providers should submit requests for additional costs at the earliest opportunity to the HEIW Education Commissioning Panel for review: heiw.edcommissioning@wales.nhs.uk The Panel will respond as soon as possible to additional funding requests to enable education providers to secure best-rate accommodation.

Education providers are required to consider prudent accommodation options wherever possible, including sourcing suitable block bookings and shared student accommodation, for relevant periods of allocated practice-based learning.

Wherever possible, requests for accommodation costs above £65 should be submitted to the Panel to allow 8 weeks' notification of a placement for a student in line with HEIW education contract standards.

6. Claims procedures and responsibilities

6.1 Student responsibilities

A claim form should be submitted to the student's education provider with all required receipts and evidence associated with travel and accommodation. Students should be advised to make a photocopy of their claim and all supporting evidence, as they will need to refer to this should any disputes arise.

Claims must be submitted within 3 months of the last day of placement. If a student submits a claim outside of the time limit, it should be returned to them and will not be reimbursed without clear mitigation.

6.2 Education provider administrator responsibilities

Relevant evidence of the costs of travel and accommodation rates and bookings must always be supplied to support claims. Education providers should not process claims where evidence has not been provided. This information should be submitted on an invoice, receipt or letter headed paper. If for some reason a student cannot obtain the required supporting evidence, the claim cannot be considered.

For accommodation claims, these must provide as much information as possible to support travel and accommodation claims. Education providers should use the suggested Template in **Appendix 1**.

Once a claim form has been submitted by a student it must be checked in full by the education provider administrator to ensure the claim is accurate, in accordance with the practice placement experience undertaken, and submitted on the latest version of the education provider's form. Once checked and verified, the claim should then be certified by reading, signing, and dating the declaration.
If any changes are made to a student's claim by the education provider Administrator, the student should be made aware of this, prior to their claim form being processed.

[2] This figure is matched to NHS staff rates and will be reviewed annually.

The education provider must notify students of timescales for submitting practice placement expense claim forms to manage their expectations of when their claim will be assessed and paid.

6.3 HEIW Education Commissioning panel

A HEIW Education Commissioning Panel: heiw.edcommissioning@wales.nhs.uk meets regularly to review claims that fall outside the usual expense claim processes as set out in this guidance. The Panel will endeavor to respond as soon as practicable to expense claim submissions. When the Panel is prevented from meeting or decisions delayed for any other reason, the relevant HEI will be informed. Expedition to the panel should be requested for urgent cases.

7. Summary

As organisations invested in the quality of student education and professional development, HEIW, education providers and placement providers commit to do everything possible to support effective conditions for practice-based learning that:

- Recognise students' safety and well-being as critical to their participation in the delivery of effective and compassionate care.
- Provide opportunities that improve students' understanding of local population health needs across regions of Wales.
- Encourage climate smart education and training that reduces carbon footprints as far as possible and improves sustainable practices.
- Makes prudent use of public money.

Appendix 1.

SAS NUMBER	UNIVERSITY STUDENT NUMBER/IDENTIFIER	FIRST NAME	SURNAME	COURSE	COHORT	TYPE	DESCRIPTION OF WHAT PAYMENT RELATES TO	POST CODE OF PLACEMENT	POST CODE OF BASE (HEI)	PLACEMENT START DATE	PLACEMENT END DATE	NO OF NIGHTS CLAIMED	PRICE PER NIGHT	TOTAL PAID	PANEL AGREEMENT	NOTES
If international quote "International" in this cell rather than SAS number.	Quoted on monitoring returns					E.G. ACCOMODATION / TRAVEL	E.G ACCOMODATION PROVIDER OR MODE OF TRANSPORT (public transport/own car etc)								provide date of panel	E.G. IF CLAIM IS FOR MORE THAN 1 INDIVIDUAL PLEASE LIST NAMES HERE