

SESLHD GUIDELINE COVER SHEET



| | |
|--|--|
| NAME OF DOCUMENT | Guideline for claiming Out of Pocket Expenses for Community members, and Community/Consumer Committee members (Contingent Workers) |
| TYPE OF DOCUMENT | GUIDELINE |
| DOCUMENT NUMBER | SESLHDGL/041 |
| DATE OF PUBLICATION | December 2021 |
| RISK RATING | Low |
| LEVEL OF EVIDENCE | National Safety and Quality Health Standards: Standard 2 – Partnering with Consumers |
| REVIEW DATE | December 2026 |
| FORMER REFERENCE(S) | Nil |
| EXECUTIVE SPONSOR or EXECUTIVE CLINICAL SPONSOR | Director, Strategy, Innovation and Improvement |
| AUTHOR | Executive Officer, Planning Population Health and Equity |
| POSITION RESPONSIBLE FOR DOCUMENT | Planning and Partnerships Lead Chloe.robinson3@health.nsw.gov.au |
| FUNCTIONAL GROUP(S) | Finance Community Partnerships |
| KEY TERMS | Community, Committee, Reimbursable, Out of Pocket Expenses |
| SUMMARY | The guideline outlines the reasonable reimbursable out of pocket expenses incurred by consumers as Community members and Community/Consumer Committee members for providing valuable input into the development and evaluation of SESLHD services. |

THIS DOCUMENT IS A GUIDE FOR BEST PRACTICE
This Guideline is intellectual property of South Eastern Sydney Local Health District.
Guideline content cannot be duplicated.

Feedback about this document can be sent to SESLHD-Policy@health.nsw.gov.au

**Guideline for claiming Out Of Pocket Expenses for consumers as
Community members and Community/Consumer Committee members
(Contingent Workers)**

Section 1 – Background 3
Section 2 – Purpose 4
Section 3 – Scope of the Guideline 5
Section 4 – Claims..... 6
Section 5 – Contacts 7
Appendix 1 – Online Supplier Vendor Creation Form (nsw.gov.au) 9

Section 1 – Background

South Eastern Sydney Local Health District (SESLHD) believes that community members play a vital role in shaping and improving the services and programs we deliver and telling us what matters to them to help us meet their needs.

We are keen to strengthen the community and local consumer voice in the planning, delivery and evaluation of our services. We also believe in finding better ways to empower consumers and community members to protect, maintain and improve their own health and wellbeing.

The role of the SESLHD Strategy Innovation & Improvement Directorate, Planning and Partnerships team is to lead, coordinate and support the efforts of the organisation to deliver its commitment to giving a stronger voice to its local community in the services we deliver.

To demonstrate this commitment, we have formed a Board Strategic Community Partnerships Committee to strengthen our collaborative approach with local community members and other service providers.

One of the key factors to ensuring community members and community/consumer committee members are not burdened financially for their ongoing contribution is the reimbursement of acceptable out of pocket expenses.¹

¹ Consumer Representatives – Working with Consumers in NSW Health, Guidelines for Secretariat, https://www1.health.nsw.gov.au/pds/Pages/doc.aspx?dn=GL2005_043 & Out of Pocket Expenses Policy Directive https://www1.health.nsw.gov.au/pds/Pages/doc.aspx?dn=PD2019_015

Section 2 – Purpose

Covering the cost for consumer/community members to participate in committees and meetings, where possible paying for their participation, recognises the specialised expert involvement of people who are making a valuable contribution to the health and wellbeing of our community.

This guideline sets out the organisation’s commitment to supporting the participation of individuals who volunteer their time as community and consumer committee members.

For the purposes of this guideline, the definition of:

- **Community member:** is an invited person from the community who provides support to our organisation on a “special occasion” such as to attend a focus group discussion, a meeting or planned forum or other similar occasion.
- **Community/consumer committee member:** is a community member who is part of a Committee, Council, working/steering group or other recognised South Eastern Sydney Local Health District group.

Section 3 – Scope of the Guideline

Definition of Out of Pocket Expenses

- **Out-of-pocket expenses** (or out-of-pocket costs) are direct outlays of cash which may be later reimbursed
- The services rendered and other in-kind expenses are not considered out-of-pocket expenses, nor are depreciation of capital goods or depletion
- South Eastern Sydney Local Health District will reimburse out-of-pocket expenses incurred by the community member (with prior approval)

The following items are acceptable to claim as out of pocket expenses:

- Work-related car and travel expenses:
 - expenses for car/motorcycles (according to the Australian Taxation Office rules)
 - public transport fares
 - bridge and road tolls
 - parking fees
 - taxi fares
- Phone calls, photocopying, postage, printing, faxes and pre-approved charges for internet access

In addition to the above stated out of pocket expenses, it may be appropriate to pay additional costs incurred by the community member, including the cost of participation. This may include things like vouchers for food or entertainment or other appropriate incentives/costs. This will be determined based on the needs and assets of the community member in full consultation and approval by SESLHD senior management.

Guidelines for approval of Out of Pocket Expenses

For out of pocket expenses to be approved by the committee secretariat or appropriately delegated SESLHD staff member, the following rules apply:

- I. The cost of the item must have a direct business relationship with the community member's role
- II. Spending money on minor gifts is not acceptable without prior approval by the committee secretariat or appropriately delegated SESLHD staff member
- III. All receipts are to be retained as evidence for reimbursement
- IV. If a personal credit card is used for out of pocket expenses, a receipt is still required. The community member cannot claim the administrative bank fees required to maintain the credit card

Information is available on the ATO website <https://www.ato.gov.au/>

Section 4 – Claims

How to claim your out of pocket expenses

1. Approval prior to paying for the out of pocket expense is required by the Committee Secretariat or appropriately delegated SESLHD staff member
2. The Committee Secretariat will complete an Online Supplier Vendor Creation Form (Section 7 of this document) upon commencement in order to be paid
3. All receipts / log book need to be attached to your claim form ([Requisition Form](#))²
4. The Committee Secretariat will process your payment as soon as the requisition is received

When possible out of pocket expenses (e.g. parking) may be reimbursed via petty cash or validation of ticket. The approval process will still need to be followed.

All forms will be provided by the Committee Secretariat who will provide assistance in completion of the paper work.

How to claim for car/motorcycles

To calculate your deduction you multiply the number of business kilometres the car travelled to and from the relevant meeting by the current rate per kilometre for that income year.

You can claim a maximum of 5,000 business kilometres per car, per year.

You do not need written evidence, but you need to be able to show how you worked out your business kilometres. Keeping a log book for kilometres travelled is the preferred method for recording this. (Your logbook should be kept for five years).

The rate applicable for 2020-21 income year is 0.72c per kilometre however is subject to change. Rates can be checked on the ATO website [Car expenses | Australian Taxation Office \(ato.gov.au\)](#)

Example

Joanne travels 30 kilometres each way to attend the St George Hospital Consumer Advisory Committee meeting therefore she can claim a reimbursement of \$43.20 each time she attends a meeting (60kms x 0.72c).

² Invoice Scanning Payment Requisition Form for Oracle R12

Section 5 – Contacts

Planning and Partnerships Project Coordinator

Based at: The Sutherland Hospital

Email: SESLHD-PlanningandPartnerships@health.nsw.gov.au

Section 6 – Documentation, References, Revision and Approval History

Documentation

1. [NSW Health Policy Directive PD2019_015 - Out of Pocket Expenses](#)
2. Work related car expenses – Australian Taxation Office
3. National Safety and Quality Health Standard 2 – Partnering with Consumers

Revision and Approval History

| Date | Revision No. | Author and Approval |
|----------------|--------------|---|
| September 2015 | 0 | Susan Busuttill, Executive Officer, Directorate Planning Population Health and Equity Reviewed by Nellon Matthews, Manager Trust Treasury and Taxation, South Eastern Sydney Local Health District |
| December 2015 | 0 | Draft for Comment |
| 31 March 2016 | 0 | Received by Executive Services |
| April 2016 | 0 | Approved by DET at April meeting with minor amendment. Change made to document and returned to Executive Services for publishing. |
| July 2020 | 1 | Minor Review. Executive Sponsor updated from Director Planning, Population Health and Equity to Director Strategy Innovation and Improvement. Approved by Executive Sponsor. |
| December 2021 | 2 | Minor Review. Content updated to Planning and Partnerships team, links updated and content reviewed. Approved by Executive Sponsor. |

Appendix 1 – Online Supplier Vendor Creation Form
(nsw.gov.au)

