

## Claiming Research Participant Travel Costs

**IT IS THE RESPONSIBILITY OF ALL USERS OF THIS SOP TO ENSURE THAT THE CORRECT VERSION IS BEING USED**

All staff should regularly check the R&D Unit's website and/or Q-Pulse for information relating to the implementation of new or revised versions. Staff must ensure that they are adequately trained in the new procedure and must make sure that all copies of superseded versions are promptly withdrawn from use unless notified otherwise by the SOP Controller.

The definitive versions of all R&D Unit SOPs appear online. If you are reading this in printed form check that the version number and date below is the most recent one as shown on the R&D Unit website: [www.northyorksresearch.nhs.uk/sops.html](http://www.northyorksresearch.nhs.uk/sops.html) and/or Q-Pulse

SOP Reference:	R&D/S31
Version Number:	1.0
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Implementation date of current version:	24 <sup>th</sup> September 2018

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This SOP will normally be reviewed at least every 3 years unless changes to the legislation require otherwise

### Version History Log

This area should detail the version history for this document. It should detail the key elements of the changes to the versions.

<b>Version</b>	<b>Date Implemented</b>	<b>Details of significant changes</b>
1.0	24 <sup>th</sup> September 2018	

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**Contents**

	<b><u>Page No</u></b>
<b>Version</b>	<b>2</b>
<b>1 Introduction, Background and Purpose</b>	<b>1</b>
<b>2 Who Should Use This SOP</b>	<b>1</b>
<b>3 When this SOP Should be Used</b>	<b>1</b>
<b>4 Procedure(s)</b>	<b>1</b>
<b>5 Related SOPs and Documents</b>	<b>2</b>

## 1 Introduction, Background and Purpose

The purpose of this Standard Operating Procedure (SOP) is to describe the procedure to use for research participants to claim travel expenses incurred during a research study.

## 2 Who Should Use This SOP

This SOP is aimed at the following people:

- Staff working in research teams on either sponsored or hosted studies (Research Nurses and Clinical Trials Support staff).
- York Foundation Trust R&D Unit staff.

## 3 When this SOP Should be Used

At any point during a research study when a research participant is able to claim money for travel costs incurred during study visits.

## 4 Procedure(s)

- There are three forms available to use for this purpose (R&D/F122, R&D/F123 and R&D/F124). The Research Nurse/CTA will complete the relevant form with the research participant at the study visit.
- Original receipts are required and these need to be handed into the finance office/cashiers office in order for the claim to be made.
- Every form is required to be signed by the research participant.
- Every form is required to be signed by the Head of R&D, or the Research Adviser in his/her absence.
- The R&D Unit study reference is required on every form.
- The budget code is required on every form – if this is not known ask the Unit Administrator.
- Once the form has been completed and signed, take a photocopy of the form and all the original receipts.
- If using form R&D/F122 the Research Nurse/CTA can then take the participant to the cashiers office to claim the money, and give a copy of the form and receipts to the Unit Administrator.
- If using forms R&D/F123 or R&D/F124 the Research Nurse/CTA can give the original form and receipts and a copy of the form and receipts to the Unit Administrator. Who will pass the claim form onto the finance office.

## 5 Related SOPs and Documents

R&D/F122	Refund of Research participant Travel Costs – Cashiers office
R&D/F123	Refund of Research participant Travel Costs – Cheque
R&D/F124	Refund of Research participant Travel Costs – Direct bank transfer

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