Pre-approval of Expenses Process

**Pre-approval of Expenses Process**

A process to approve expenses before taking part in a research activity.

By ‘research activity’ we mean attendance at any research related meeting or training event that the Public Involvement and Engagement Team has agreed to support.

You'll complete a pre-approval form and send it to us **at least five working days before** every activity you attend, telling us what expenses you think you'll need to claim.

The Team will check the form and if necessary suggest any changes before **approving the expenses that can be claimed** for that research activity.

Once approved, the Team will **book and pay for any travel and subsistence that can be arranged in advance**, for example hotel accommodation and train travel.

After the research activity has taken place you will send an **expense claim form** to us, with any relevant receipts attached.

The Team will **check your expenses claim against what was agreed to** in the pre-approval form, before sending it on to our finance department for payment.

**Why are we asking you to fill out the form?**

- To help us identify what your needs are before a research activity. We can then book and pay for travel and accommodation directly, so that you are not out of pocket.

- By pre-approving expenses, we can ensure your expenses claim is processed as quickly as possible after the research activity has taken place.

- The Public Involvement and Engagement Team need a process in place to ensure that your expenses are authorised appropriately, in line with our Guidelines.

- The Public Involvement and Engagement Team can use the information to budget for each research activity, especially when there is more than one person involved.

If you would like further information or have any questions about the process, please contact the Public Involvement and Engagement Team on 029 2023 0457 or by email research-involvement@wales.nhs.uk