

De-implementing low value care

Patient partner appreciation policy

According to the Strategy for Patient Oriented Research (SPOR)'s guiding principles, patient partners should be supported for their involvement in research. This support includes providing safe environments which promote honest interactions, cultural competence, training and education, as well as financial compensation. This compensation, or appreciation as we have termed it, is in recognition of the time and expertise that our patient partners dedicate to research projects.

Appreciation may be in the form of reimbursing patient partners' expenses or funds provided to them directly.

This policy has been developed specifically for patient partners in the Choosing Wisely Canada-Innovative Clinical Trial (iCT) and follows both Canadian Institutes for Health Research (CIHR) and Ottawa Hospital Research Institute (OHRI) requirements and regulations.

1. Expenses

Expenses that are necessary and reasonable will be covered, either by paying the costs directly or reimbursing the patient partner. Itemized receipts should be scanned or photographed and emailed to the study contact below within 2 weeks of the cost being incurred:

Stefanie Linklater

Patient Engagement Coordinator and Research Program Manager

slinklater@ohri.ca

Please note that it can take up to 8 weeks after receipts have been processed to receive reimbursement.

Expenses will cover:

1.1. Travel

- Travel to attend a study activity such as training or meetings will be paid for or reimbursed following the regulations below.
 - Airline ticket (economy class air travel by the most direct route) * Flights which cost greater than \$2000 must be booked through the OHRI travel agent.
 - Ground transportation such as taxis or public transit (to and from the airport, train or bus station, hotel or meeting venue)
 - Personal vehicle (\$0.55 cents per km) * *Please see OHRI travel policy for more details.*
 - Train (business class rail fare)
 - Parking

1.2. Overnight accommodation

- When traveling to participate in a study activity such as training or meetings, overnight accommodation (hotel, motel, bed & breakfast, lodge or other) will be reimbursed within reason (e.g. If the partner lives in the city where the activity is held, accommodations will not be covered).

- Hotel accommodations must be booked at a reasonable cost (maximum \$300 CAD/night; exceptions can be made with advance approval from the Research Program Manager).
- Where available, conference rates should be used in order to obtain the best price possible. Please ensure that rooms are booked before the cut-off date.

1.3. Meals and other refreshments

- Refreshments and lunch are usually provided for all day meetings and training activities.
- If the patient partner requires additional meals and refreshments (e.g. while travelling), the costs can be claimed (alcohol excluded) up to a daily maximum of \$90.00 CAD per day (\$20.00 breakfast; \$25.00 lunch; \$45.00 dinner).
- This is not stipend based and itemized receipts are required for all purchases. Without itemized receipts, reimbursement will not be issued.

1.4. Childcare or alternative care costs

- If the patient partner is a caregiver and needs to attend an activity such as training or meetings, the costs of providing alternate care will be reimbursed within reason.
- Advance approval from the Research Program Manager and documentation indicating the hourly/daily cost will be required.
- This reimbursement item will be reviewed on a case-by-case basis.

1.5. Personal assistants

- If the patient partner needs a personal assistant for attending an activity such as training or meetings, the costs will be reimbursed within reason.
- Advance approval from the Research Program Manager and documentation indicating the hourly/daily cost will be required.
- This reimbursement item will be reviewed on a case-by-case basis.

1.6. Learning and training

- If a study Principal Investigator approves a patient partner's attendance at a training event or conference, the registration fees and associated costs will be reimbursed.

2. Appreciation for Time

Patient partners will be offered honoraria in appreciation of their time working as a research partner. Please refer to the following sections for the appreciation scale and important considerations.

2.1. Appreciation Scale

- The honoraria offered will depend on the level of time and complexity of the engagement opportunity as well as the effort and skill level of the patient partner.
- Time spent on meeting preparation and travel time is included in the honoraria and will not be compensated separately.
- The honoraria will be in addition to any reimbursement of expenses incurred by patients when attending meetings (such as costs of traveling, accommodation).

- Training and orientation meetings are not eligible for honoraria however training should be provided free of charge for patient partners.

Activity	Appreciation	Description	Criteria
Annual Steering Committee Meeting	\$150 per year	This is the standard one-time honorarium offered for preparation and attendance at the annual Steering Committee Meeting	<ul style="list-style-type: none"> • Attendance (virtual or in-person) at the one steering committee meeting per year (this may require travel within Canada)
Patient Partnership Council (PPC) meetings	\$350 per year	This is the standard one-time honorarium offered for meeting attendance, document review and other assistance as required by the study team.	Attendance at a minimum of 70% PPC meetings
Document review			Review documents as needed
Provincial team meetings			Attend meetings as needed

2.2. Honoraria Processing

- For meeting attendance, honoraria will be processed within one month after the meeting.
- For all other honoraria, a cheque request will be processed at before the end of the fiscal year (March 31).
- To process any honoraria reimbursement, a SIN (Social Insurance Number) will be required as this is considered taxable income. Please see section 2.3 for more details.
- An unofficial Statement of Remuneration will be provided at the end of each calendar year for tax purposes. Please contact the Research Program Manager if you have questions concerning this.

2.3. Important Considerations

- Honoraria received as a result of your participation in this study, other than money received for reimbursement of study expense receipts, is considered a taxable benefit by the Canada Revenue Agency. In order to receive payment for your participation, it will be necessary to provide the investigator or their delegate with your Social Insurance Number. The Ottawa Hospital will then issue a T4A statement to you for any amount equal to or greater than \$500.00 in a calendar year and they will provide this information to the Canada Revenue Agency
- If the patient partners need assistance to determine if their financial situation is affected by the payment, they can contact the Patient Engagement Coordinator and/or the Research Program Manager.
- Patient partners have the right to decline the honoraria which will not affect their future participation in the study or reimbursement for other expenses incurred. The decision to accept or decline the offer will remain confidential.
- Patient partners also have the right to partially accept the honoraria based on their individual financial and tax implication situations.
- Patient partners should be aware that providing honoraria in appreciation of time is not mandatory, so this guidance may differ from other study teams that they participate in based on the resources available.

Any questions regarding this policy and/or other finance related issues can be directed to:

Stefanie Linklater
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