

Expert Patient common role – criteria for use

Step 1 - check your engagement meets this criteria

Description of services:	An individual with lived experience of a particular health or other condition who will be part of a focus group or other interactive process to help support research or teaching Not to be used for medical actor
Maximum value of engagement to use common role:	£1000 if fee is higher, HMRC CEST tool must be used to complete a specific employment assessment

Step 2 – carefully check all responses on the Pre-NESA Questionnaire (PNQ) for your engagement match all of the responses in the assessment below (this is essential to ensure the University adheres to HMRC employment status regulations)

If responses on your PNQ do not match any of the responses in the assessment below, you must use the HMRC CEST tool (see step 3b of the [NESA webpage](#)).

Who are you?	Hirer
Does the worker provide their services through a limited company, partnership or unincorporated association?	Yes
Has the worker already started working for your organisation?	No
Will the worker be an office holder?	No
Do you have the right to reject a substitute?	No
Would the worker have to pay their substitute?	Yes

Control

Does your organisation have the right to move the worker from the task they originally agreed to do?	No, that would require a new contract or formal working arrangement
Does your organisation have the right to decide how the work is done?	No, the worker solely decides
Does your organisation have the right to decide the worker's working hours?	No, your organisation and the worker agrees
Does your organisation have the right to decide where the worker does the work?	No, the task sets the location

Financial risk

Will the worker have to buy equipment before your organisation pays them?	No
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Will the worker have to fund any vehicle costs before your organisation pays them?	No
Will the worker have to buy materials before your organisation pays them?	No
Will the worker have to fund any other costs before your organisation pays them?	No
How will the worker be paid for this work?	A fixed price for the project
If your organisation was not happy with the work, would the worker have to put it right?	No, the work is time-specific or for a single event

Worker's Involvement

Will you provide the worker with paid-for corporate benefits?	No
Will the worker have any management responsibilities for your organisation?	No
How would the worker introduce themselves to your consumers or suppliers?	This would not happen

Worker's Contract

Does your organisation know who will be doing this work?	Yes
Does this contract stop the worker from doing similar work for other organisations?	No
Is the worker required to ask permission to work for other organisations?	No
Are there any ownership rights relating to this contract?	No

Has the worker had a previous contract with your organisation? (see PNQ 2.6) Yes or No

Is the current contract the first in a series of contracts agreed with your organisation? No

Does the current contract allow for it to be extended? No

Will this work take up the majority of the worker's available working time? (see PNQ 2.6) No

Has the worker done any self-employed work of a similar nature for other clients in the last 12 months? (see PNQ 2.6) Yes or No
