

HC5(T) Refund claim form: travel costs to receive NHS treatment

Please read this page before filling in this form - it will help you make this claim correctly. Use a separate form for each person who has paid travel costs or has had travel costs paid for them. **Part 4** tells you where to send the completed form. Before you do this, you must sign and date the declaration.

The information on this form may be disclosed in confidence to other public bodies as appropriate for the purposes of checking entitlement and preventing or detecting fraud. False information may lead to prosecution or legal action.

What can you claim for?

You can claim help with the cost of travel if you are on a low income and have made an additional journey to receive NHS care following a referral by a doctor (GP or hospital doctor), optician or dentist. Treatment can be provided by a private hospital, you can still claim if the treatment was arranged by an NHS organisation or a local authority.

If you need help with travel costs and you are:

- under 16 – your parent(s) should fill in this form – it is their income that counts
- aged 16 or over – fill in the form yourself

You may also have to submit an HC1 claim form (see part 4).

How to claim for somebody else

If you are filling in this form for someone who is physically incapable of doing so, ask them to tell you what to fill in for them. They should then sign or make their mark in **Part 4A**.

If however, you are filling in the form for someone with learning difficulties or a condition that prevents them from managing their own affairs, you are responsible for making sure the information is correct. You should sign the form yourself in **Part 4B**.

Time limit for claiming

You must ensure that this claim form is received by the relevant office identified in **Part 4** within 3 months of the date that you paid any charges.

If you make the claim after 3 months, the NHS Business Services Authority has to decide if there is a good reason for it being late before it can be accepted. In this case, please send a written explanation with your claim to NHS Business Services Authority, Help with Health Costs, Bridge House, 152 Pilgrim Street, Newcastle upon Tyne NE1 6SN.

More refund information

More refund details can be found in leaflet HC11 "Help with Health Costs" available to download at: www.nhsbsa.nhs.uk/check.

If you have paid an NHS prescription charge you must use the prescription receipt form FP57 to claim a refund. Ask for that receipt form when you pay - you can't get one later. It tells you what to do.

If you have paid for other NHS charges you must use the claim form for the charge you have paid. There are separate forms for each type of charge (HC5(D) for dental charges, HC5(O) for optical costs and HC5(W) for wigs and fabric support charges).

The forms are available online at www.nhsbsa.nhs.uk/HC5. If you have any queries or need help filling in this form you can speak to an advisor on 0300 330 1343.

Part 1 - Patient's details

Please use this part of the form to tell us about the patient: this may be you or the person on whose behalf you are making the claim.

Surname

Other names

Title (Mr/Mrs/Miss/Ms/Other):

Date of birth

 / /

National Insurance No.

Address

 Postcode

Email address

Daytime phone number

This must be the number of the person signing at Part 4

Name of your local NHS Integrated Care Board:

Part 2 - Details of travel costs paid

Please send us any tickets or fuel receipts.

I wish to claim a refund of

 £

for **travel to receive treatment following a referral by a doctor, dentist or optician** – give the details below and send us any tickets or fuel receipts

Date(s) you attended

 / / / / / /

Amount you paid for that visit

 £ £ £ £

If someone had to travel with you as an escort fill in the amount they paid for their visit

 £ £ £ £

If you need space for details of other visits, list them on a separate piece of paper with the dates, amount paid and the patient's name and address, and attach it to this form. If you are not sure of any of the dates, ask the place of treatment.

Patient's treatment reference number

Department attended

I wish any refund to be paid into the following account:

Name(s) of account holder(s)

Full name of bank, building society or other account provider

Sort code of the bank, building society or other account provider.

Account number

If a building society account, the building society roll or reference number

Some building society accounts use a roll or reference number. If you are not sure if the account has a roll or reference number, ask the building society.

Incorrect account details will delay any refund you are entitled to.

Part 3 - Other information we need

Name of the doctor, dentist or optician who referred you:

Name, address and telephone number of the hospital or place of treatment in **full** please.

Name

Telephone number

Address

 Postcode

Part 4 - Reason for claim

Tick whichever box applied when the travel costs were paid and give the information we ask for.

- Group 1** I receive a War Pension payment or an Armed Forces Compensation Scheme payment and I am being treated for my accepted disablement. No.
Send this form to: Service Personnel and Veterans Agency, Norcross, Blackpool FY5 3WP.

- Group 2** My name was on an NHS certificate HC2 or HC3 No.
The person holding the certificate was:
Forename: Surname: Date of birth / /
 I am named on or entitled to an NHS Tax Credit Exemption Certificate. No.
(If you do not have a certificate, send in a copy of your award notice)
Send this form to: NHS Business Services Authority, Bridge House, 152 Pilgrim Street, Newcastle upon Tyne NE1 6SN.

Group 3

- I was getting one of the benefits/credits listed below (please tick which benefit/credit applies).
- I am the partner or a dependant child/young person under 20 years of age of someone who was getting one of these benefits/credits (please tick which benefit/credit applies).
Date of birth / / The person getting the benefit/credit was:
If this person was not the patient, please tell us either their date of birth or their National Insurance number:
Date of birth / / National Insurance number
- Universal Credit** and for the last complete assessment period before the travel costs were paid there were no earnings or net earnings of £435 or less (£935 if you had a child element or had limited capability for work). Check the limit at www.nhsbsa.nhs.uk/check-if-youre-eligible-help. If your treatment was during your first Universal Credit assessment period you qualify for a refund if, once your claim to Universal Credit is decided, you met the earnings conditions during that assessment period. You also qualify for a refund if you met the qualifying criteria during the Universal Credit assessment period during which the travel charge was incurred. Send this form to your local Jobcentre Plus office.
- Income Support** – send this form to your local Jobcentre Plus office
- Income-based Jobseeker's Allowance** – send this form to your local Jobcentre Plus office
- Income-related Employment and Support Allowance** – send this form to your local Jobcentre Plus office
- Pension Credit Guarantee Credit** – send this form to the Pension Centre who dealt with your claim

If you receive or are included in an award of any of the benefits listed in Group 3 you can claim a refund. If you get one of these benefits alongside another benefit you will still be able to claim. Contribution based benefits paid on their own do not count. Check your benefit/credit before you sign. For more information see www.nhsbsa.nhs.uk/check-if-youre-eligible-help.

Group 4

- I am not in groups 1 to 3, but wish to claim a refund of travel costs paid, because I am on a low income.
- I am aged 16, 17 or 18 and not in a family described in group 2 or 3, but wish to claim a refund of travel costs as I have a low income (you must make your own claim on an HC1 form based on your financial circumstances).

You will need to fill in an HC1 form to apply to the NHS Low Income Scheme. You can get a form by calling 0300 123 0849 or visiting www.nhsbsa.nhs.uk/healthcosts. Send this form with the HC1 form to NHS Business Services Authority, Bridge House, 152 Pilgrim Street, Newcastle upon Tyne NE1 6SN.

Declaration and signature

**Warning: False information may lead to civil or criminal action.
If you are signing for somebody else, you will be responsible for the information provided.**

I declare that the information given on this form and the supporting documents are correct and complete and I understand that if I knowingly provide false information, I may be liable to prosecution and/or civil proceedings.

I consent to the disclosure of relevant information on this form to and by HM Revenue and Customs, Local Authorities and the Department for Work and Pensions for the purpose of verification.

I also consent to the disclosure of information on this form to NHS Counter Fraud Authority for the purpose of the prevention, detection, investigation and prosecution of fraud and any other unlawful activity affecting the NHS.

How we use your information: The NHS Business Services Authority will use the information that you have provided to process your claim for a refund of necessary NHS costs. We match the information provided against any claims you make of being exempt from NHS charges. We will not transfer your personal data outside the United Kingdom or the European Economic Area. We manage the information you provide as required by Data Protection law. This includes the General Data Protection Regulations (GDPR). Your Personal data will be deleted from our systems and files no later than 24 months after the date of expiry of the certificate or assessment. Further details are available at www.nhsbsa.nhs.uk/yourinformation

Declaration and signature - continued

This is my claim for a refund of my travel costs listed in Part 2

4A Signature

Date / /

This is a claim on behalf of the person named in Part 1 for a refund of the travel costs listed in Part 2

4B Signature

Date / /

Name (in capitals)

Telephone number

Address

Postcode

Part 5 - For Official Use only by Jobcentre Plus Offices, the Pensions Centre and the NHS Business Services Authority

Step 1 I confirm that the person named on this form is included in an award of the benefit / credit, or is entitled to a certificate as indicated in Part 4, on the date(s) indicated in Part 2.

Step 2 I confirm that the patient named in Part 1 of this form is entitled to:

a full refund of necessary travel costs paid on or after / /

a refund of the difference between £ and the necessary travel costs paid in any one week on or after / /

The actual amount(s) paid is/are shown on the attached receipts

Signature

Date / /

Name (in capitals)

Office address stamp

Authorisation stamp

I confirm that this claim has been accepted outside the 3 months time limit (NHSBSA only).

Step 3 If treatment was received at an NHS hospital, please send this form to the hospital shown in Part 3. If treatment was received elsewhere (including at a private hospital), please send this form to the NHS Integrated Care Board (ICB) that covers the patients address in Part 1. Check to find the ICB's address at odsportal.digital.nhs.uk/Geographic/Search.

To:

For Official Use only by the NHS England payment services on behalf of the ICB.

Payment of £ made to patient named in Part 1 of this form on / /

Notes