

Finance Policy

Purpose

This policy is intended to set out the values and principles underpinning SOS Homecare's approach to client finances.

Gifts and Gratuities

SOS Homecare undertakes to reimburse employees adequately for the services that they provide to the Company standards. The receipt by any employee of any gifts or gratuities from service users, service providers or any source related to their employment is strictly forbidden. The lending, borrowing, buying or selling between the service user and care worker is also strictly forbidden. This includes:

- Acceptance of gifts or cash **except** at Christmas when staff are permitted to receive a gift not exceeding the value of £5 - the Line Manager must be informed immediately.
- Borrowing or lending money or property
- Selling or buying from catalogues
- Party planning
- Buying or selling private services
- Taking responsibility for looking after any valuable on behalf of the service user
- Taking responsibility for looking after another family member
- Taking responsibility for the care of a pet
- Personal use of the service users property, for example, the telephone, store club cards
- Involvement in gambling syndicates (National Lottery, Football Pools)
- Incurring a liability on behalf of the client.

Any employee involved in any of these practices will be subject to the company disciplinary procedure, which may lead to dismissal. Where gifts are offered, they should be refused explaining that it is against Company policy. If the care worker is pressurised into accepting gifts he or she must immediately inform the Branch Manager.

Signatories to Legal Documents

Employees of SOS Homecare are not permitted to act as Executor or Witness to a service user's Will. The handling of service user's finances as an appointee, agent, receiver or attorney is not part of the role of SOS Homecare employees. Where clients experience difficulties in managing their financial affairs and discuss this with the employee, this matter should be immediately referred to the Branch Manager who will inform the Local Authority.

Where the service user is privately funded, they must be advised to consult a Solicitor to discuss financial affairs. If the service user is no longer able to make informed decisions the matter is referred by the Branch Manager to the Local Authority who will appoint a Receiver.

Shopping / Laundry Services

Any financial transaction undertaken on behalf of the service user must be recorded appropriately in the finance book/sheet, or on EveryLIFE PASS care notes. The employee must sign for money received, spent and change given.

Personal Bank Cards

Employees of SOS Homecare are only permitted to use the service user's personal bank cards to pay via contactless payment only or to enable the service user to use the cards themselves.

PIN Numbers

Employees of SOS Homecare are not permitted to have access to a service user's PIN number for bank cards. If the employee happens to be told, or otherwise discover the PIN number then they must report this immediately to the Branch Manager and the service user will be assisted to change the PIN number to safeguard both the service user and the employee.

Pre-payment Cards

Service Users may have pre-payment cards (i.e. cards which have a small amount of money loaded onto them by either the Local Authority or the client's NOK). It is acceptable for staff to know the PIN for these cards.

Service Users who cannot access the cash point or bank and/or have no NOK to assist.

The Branch Manager must be informed of this immediately and arrangements must be made with the Local Authority and the social worker. Office Team will add outcome of discussion with local authority to the care plan.

Storage of money on behalf of a Service User

Service Users should be informed that any monies held in their property should be stored in a secure location, in a cash box with the service user being aware of where the tin is. The management of the tin will be outlined within the care plan, i.e. whether the service user can hold the key themselves or whether the staff members retain the key due to concerns around safeguarding. Any monies kept in the property which would be considered excessive, the service user should be advised to bank the excess monies and this should be reported to the office.

Holding Monies on behalf of a Service User

SOS Homecare will not hold money for clients. Alternative methods must be used.

Training

All new staff must be instructed on the Company's Finance Policy as part of their induction process. Existing staff should be encouraged to update their knowledge by regularly reviewing their Carers Handbook.

Review

This policy will be reviewed every year.