

	<p align="center">Management of Client Monies by Home Based Support Workers Procedure</p>	<p align="center">Procedure Number <i>CHC-PSW-0001</i></p>	<p align="center">Version Nos: 6</p>
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1. Purpose

This Procedure is performed to ensure that there is a documented process that provides guidance with regard to the handling of clients money by West Coast District Health Board (WCDHB) Home Based Support workers.

2. Application

This Procedure applies to all Home Based Support workers employed by WCDHB

3. Definitions

For the purposes of this Procedure:

“Monies” is taken to mean cash, cheques, bankcard or bankbook.

4. Responsibilities

WCDHB *Home Based Support workers* shall:

- only handle client monies as per this Procedure when required by the client care plan;
- sign the agreement form before handling client monies;
- place receipts and bank receipt data in a notebook in the client’s house.

The *Client* shall:

- sign the agreement form;
- instruct the homecare worker as to the handling of their monies;
- inform the Home Based Support Service Fieldworker if any dishonest practice is suspected.

The *Home Based Support Service Fieldworker* shall:

- over see the application of this Procedure;
- ensure that the agreement forms are signed, filed and reviewed;
- undertake audit of the client’s receipt notebook;
- advise the Supervising Social Worker of any claims of dishonest practices or breaches of this Procedure.

5. Resources Required

None

6. Process

1.00 Introduction

- 1.01 WCDHB Home Based Support workers shall only handle client monies in a manner that complies with this Procedure and as detailed in the client care plan, up to a maximum value of \$50.

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1.02 WCDHB Home Based Support workers who handle client monies outside this Procedure or the client care plan may be subject to disciplinary action as detailed in the WCDHB Discipline, Suspension and Dismissal Procedure and/or investigation by the police.

2.00 Agreement Form

2.01 A agreement form will be signed by the client and/or their representative and the WCDHB Home Based Support worker.

2.02 By signing the agreement form the Home Based Support worker is acknowledging their acceptance of responsibility with regard to the correct handling of client monies.

2.03 A copy of this agreement form will be:

- kept by the client;
- retained in the client's file;
- retained by the Home Based Support worker concerned.

2.04 The agreement form is not transferable to another Home Based Support worker. If the Home Based Support Worker changes a new agreement form must be established.

2.05 A client can revoke the agreement form at any time.

2.06 The agreement form will be reviewed every annually or as circumstances require to ensure that it is still valid and is fully representative of the situation.

2.07 Any changes required will be made and documented in:

- the client notes; and
- signed and dated on the agreement form.

3.00 Handling Of Client Monies

3.01 At no time is the Home Based Support worker to handle their client's monies without the express agreement of the client.

3.02 The Home Based Support worker is not to take responsibility for their client's chequebook bankbook or bank card (including PIN number). These are to remain in the possession of the client.

3.03 Whenever possible, the client is to be present when the Home Based Support worker is undertaking any task involving monies for the client.

4.00 Auditing Process

4.01 All receipts (from purchases), and bank receipt data shall be kept in a notebook, as well as the amount of any change from any purchases.

4.02 The notebook is to remain in the client's house/place of residence.

- 4.03 The notebook will be signed and dated each time by the Home Based Support worker and the clients (or their representative).
- 4.04 The Home Based Services Fieldworker will undertake a regular programme of checking the notebooks to ensure the Procedure is being complied with, and when there is a change of homecare worker.

5.00 Dishonest Practice

- 5.01 If at any time the client or their representative has an issue or question about dishonest practice by the Home Based Support worker, they are to immediately contact the Home Based Services Fieldworker.
- 5.02 The Home Based Services Fieldworker shall report the complaint of alleged dishonest practice to the Supervising Social Worker, in accordance with the WCDHB Discipline, Suspension and Dismissal Policy and Procedure.
- 5.03 If after investigation there appears to be dishonest practice, the matter shall be referred to the Police.

7. Precautions And Considerations

- ➔ A agreement form is to be signed by the client, their representative and the WCDHB Home Based Support Worker.
- ➔ All receipts and bank receipt data are to be kept in a notebook in the client's house.

8. References

There are no specific references associated with this Procedure

9. Related Documents

WCDHB Client Agreement Form for Home Based Support Workers To Handle Client Monies
 WCDHB Discipline, Suspension, and Dismissal Procedure

Revision History	Version:	6
	Developed By:	Supervising Social Worker
	Authorised By:	General Manager - Hospitals
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