

The Paraplegic and Quadriplegic Association of SA Inc.



Client Finances Policy

Statement

The Paraplegic and Quadriplegic Association of South Australia Incorporated (the Association) is committed to upholding the highest standards of ethical respectful and safe service practices and procedures which meets legislative requirements.

Approved by: 	Date: 20/5/2014
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The Paraplegic and Quadriplegic Association of SA Inc. is incorporated under the *Association Incorporation Act 1985* (SA) and conduct its business through operating Divisions, namely PARAQUAD SA and HOMECARE PLUS.

SCOPE

This policy applies to all Association employees, volunteers and clients.

DEFINITIONS

An advocate is someone who:

- ◆ Acts on the client's instructions
- ◆ Supports and encourages the client
- ◆ Works solely on the client's behalf, and
- ◆ Speaks on the client's behalf to promote their ideas and interests.

An advocate may be a relative, carer, friend, neighbour or someone from an Advocacy service.

Client – any person who uses the professional services of the Association.

Must – indicates a mandatory action required by law, industrial instrument or the Association's policy or procedure.

Should - indicates a recommended action that should be followed unless there are sound grounds for taking a different course of action.

Worker – is a person who carries out work in any capacity for a person conducting a business or undertaking including work as an employee, contractor or subcontractor, an employee of a contractor or sub-contractor, an employee of a labour hire company, an outworker, apprentice or trainee, or a student gaining work experience.

RESPONSIBILITIES

It is the responsibility of the Association to communicate the contents of this policy to all employees, volunteers and clients on a regular basis.

POLICY

Service management will ensure flexibility to respond to the individual needs of the client, whilst not placing our workers in a professionally compromised position.

PROCEDURES

A Staff member or Employee must never, under any circumstances, do any of the following:

- Borrow money from a Client
- Borrow personal items from a Client
- Loan money to a Client
- Loan personal items to a Client
- Ask a Client to act as Guarantor for them
- Act as Guarantor for a Client
- Give advice on financial matters.

Disregard of any of the above will lead to disciplinary action and possible termination of employment.

If a Client is experiencing financial difficulties, the Support Worker/Volunteer will advise their Supervisor/Coordinator who will then take appropriate action. If a Client asks a Support Worker/Volunteer to carry out any financial transactions, for example going to the bank, the Support Worker/Volunteer must first check with the Client to see if there is a third, independent person, a family member or a friend who could assist them.

If there is no independent person available to assist the Client, the Support Worker/Volunteer will then:

- ◆ Contact their Supervisor/Coordinator to discuss the situation and follow the directions given to them.

There are some Clients who require Support Workers to assist with their banking, bill paying, shopping etc. as part of their normal routine in accordance with their Support Plan. In these cases, the Support Worker must adhere to the following procedure:

1. Ensure that all financial transactions are recorded in a Cash book. If there is no Cash book available in the Client's home, the Office must be contacted to organise one. It may be that the Support Worker will need to purchase one when next doing the shopping for the Client.
2. Ensure that there are receipts for all bank transactions.
3. When paying bills or doing shopping, Support Worker must ensure that tax receipts are obtained and kept.
4. Once a receipt is obtained, it is to be signed and dated legibly by the Support Worker and put into the Cash book to cross reference the noted expenditure.
5. Make note of the expenditure or transaction in the Cash book kept at the Client's home and also in the Support Worker's diary or record book.
6. If there is even the slightest concern, contact the HOMECARE PLUS Office and discuss with a Client Service Officer, Team Leader or Manager.

RELATED LEGISLATION

- ◆ Equal Opportunity Act 1984
- ◆ Disability Discrimination Act 1992
- ◆ Disability Service Standard 1 – Rights
- ◆ Disability Service Standard 6 – Service Management

SUPPORTING PQA DOCUMENTATION

- ◆ Code of Ethical Behaviour
- ◆ Advocacy Policy and Procedure
- ◆ Confidentiality Policy and Procedure
- ◆ Discipline and Termination of Employment Policy and Procedures

BREACHES OF THIS POLICY

A **breach** of this policy is grounds for disciplinary action, up to and including termination of employment. Ignorance of these procedures will not generally be accepted as an excuse for non-compliance. Only in extreme circumstances and where such ignorance can be demonstrated to have occurred through no fault of the individual concerned will the Association accept such an argument.

DISTRIBUTION AND REVIEW

The Association will ensure all persons engaged to provide services either paid or unpaid will be aware of this policy and will have easy access to it in an appropriate format. All policies are to be reviewed on a bi-annual basis or when legislation or Government Policy determines.