



Financial Guidelines 2023

Linsell House Respite Service

Supporting People with Finances and Valuables

Care & Support Service, SCHH - Adult Social Care

Introduction

- 1.1 This localised guidance provides a Person-Centred framework that puts the individual at the centre of all procedures relating to their personal finances and valuables whilst staying at Respite.
- 1.2 This document reflects Central Bedfordshire Council's Financial Policies and Procedures.
- 1.3 This document recognises that wherever possible people accessing services should be encouraged to have responsibility for their own funds and valuables.
- 1.4 All people accessing Respite will have a thorough Risk Assessment outlining the level of support they require. Where it is recognised to be in the person's best interest to have staff to manage their finances, staff must follow the guidelines incorporated in this document.
- 1.5 Any financial irregularities must be reported to the Registered Manager and the Safeguarding Team immediately.
- 1.6 People's valuables must be recorded in the Valuables book on arrival, daily and on their departure. This must be countersigned by another member of staff or the person's representative.
- 1.7 Within the context of this document, valuables can include CDs, jewellery or items of sentimental value. All people have a capacity assessment in place regarding their ability to manage their own finances.

Supporting People

Transition

- 2.1 A Risk Assessment will be completed for all people accessing Respite. This will outline how individual personal finances will be managed while accessing the Service. People can request to manage their own finances, manage a percentage of their money and request that Linsell House holds the balance. Linsell House will support with the safe storage of valuables including monies for all people who lack capacity.
- 2.2 The Service will make available a lockable drawer in the person's room for their sole use in securing valuables including monies. Alternatively, people who request or lack capacity can have their valuables stored within the main safe or securely locked in the main office.

Arrival

- 2.3 On arrival to Respite, staff will confirm with the person or their representative the amount of money that they have. The staff and person (when possible) will sign the person's individual finance sheet. The money will then be locked in a tin specifically for this use and stored in the lockable drawer in the main office. The amount in this tin will also be recorded and signed by two staff in the "money held in drawer book" and on the person's individual financial sheet.

- 2.4 It is the responsibility of the Shift Leader to carry the keys to the money drawer and tin on them at all times and ensure the safe handover of the keys and correct monies to the next Shift Leader (Shift Leaders are clearly identified on the shift planner). After every shift, the monies held must be counted and verified by two staff.
- 2.5 Any financial transactions that take place must be clearly recorded on the person's financial sheet located in the respite unit; this must be completed and verified by two staff. The Shift Leader and countersigning staff member must also adjust the amount held in the "monies held in drawer" book to ensure a complete audit trail.
- 2.6 Staff supporting people in the community must provide a receipt for any goods purchased. Where this is not possible or the amount is less than £2.00, staff must sign a R1 receipt.

Discharge

- 2.7 When people are departing Linsell House, all money must be checked by two members of staff in front of the escort, driver or whoever is collecting their belongings. This must be recorded on the original documentation (individual's financial sheet) by both staff and the recipient must sign to say that they are now in receipt of the money.
- 2.8 All monies held by Linsell House for respite services may only be held for the duration of the person's stay. They must then be passed over to the person when they leave. Monies cannot be held for people on a long-term basis.

The Senior Care Coordinator or Registered Manager will carry out a monthly audit of all finances held within the Service.
- 2.9 ALL Linsell House staff must read and sign to say they have understood this document