

Financial Procedure 2025

Community Services – Reablement

Care & Support Service - Adult Social Care

Introduction

If there are concerns about a person's ability to manage their own finances, the coordinator will use the Mental Capacity Tool on PCS to assess whether the person can handle their own money or requires assistance.

If the capacity assessment and risk assessment show that a person cannot manage their finances, an appointee will be assigned to do so on their behalf.

General

- When supporting a person with their money, staff will record transactions on a financial transactions record sheet.

If staff are required to support a person with their money:

- Money received should be checked, including any money received in sealed envelopes.
- Use the transaction record sheet to record any activities i.e. the person's full name, address and date clearly and the amount of money received.
- Both the person and the member of staff should sign against the activities/transactions recorded, including for receipt of money received.
- When shopping for people, staff must NOT use their own personal reward cards.
- Under no circumstances take a person's bank card and PIN number.

After transactions ...

- Any loose change must be checked with the person and documented in the transaction record.
- All signed records & till receipts must be given to the person.
- The amount of change given must be entered into transaction record.
- When using a transaction record, the form should be left with the person. The support worker should take a photograph of the completed document using their work mobile phone. The image must be uploaded to PCS in the scanned document section as soon as possible and then deleted from the mobile phone.

No cash/cheques should change hands without a receipt being issued. This applies to all parties concerned and at each stage of the transaction.

- Staff are under strict instructions to keep their money separate from that of the persons.
- Staff should not treat people's money as their own or vice versa.
- Staff should not open any bank accounts etc. jointly with people in receipt of services.
- Staff must not borrow from or lend money to people under any circumstances.

Reablement Cash Transaction Record

To be completed when supporting a person with cash transactions.

Name of Worker:	
Name of Person:	
Address of Person:	

Total Cash Given:	£
Change Returned:	£

	Item Description	Quantity Purchased	Price
1			£
2			£
3			£
4			£
5			£
6			£
		Total Cost	

Signed (Worker):		Date:
Signed (Person):		Date:

This document should be kept in the persons care and support folder in their home

Reablement Worker should take a photograph of this form for their records