

Harrow Shared Lives Scheme Policy & Procedure No. 36

Management of People's Money, Valuables and Financial Affairs

The Harrow Shared Lives Scheme (HSLs) aims to encourage and enable you to be in control of your own life. This includes looking after your money and managing your financial affairs and you have the right to keep these matters private. However people in Shared Lives (SL) arrangements may sometimes need support with this from their SL Carer and/or they may bring money or valuables to their SL Carer's home. In order to protect them from financial abuse or the mishandling of their money and to protect their SL Carers from allegations of misconduct, it is important that appropriate procedures are followed and records are kept.

How would this happen?

Before starting any SL arrangements, SL Carers will receive information and training so that they understand how to support you in doing as much as possible for yourself and how to safeguard you and themselves if you require support with budgeting, saving, shopping or other financial matters.

Your SL Carer will not be able to support you with your finances unless this has been explicitly agreed in your Service User Plan. The kinds of support could include things like: -

- accessing information about your money;
- completing welfare benefits forms or replying to correspondence about this;
- recognising different coins or notes or understanding the value of money
- saving for something special;
- learning how to budget;
- reminding you to pay your regular bills;
- helping you to shop.

If you bring money with you when you visit your SL Carers and you ask them to look after it for you, they will keep a written record of the amount, what it is for (when applicable) and also the date and amount when they give it back to you. They will also keep receipts and/or records of what the money was spent on if it has been agreed they should spend it on your behalf and/or when this is required as part of your Service User Plan.

If you ask your SL Carers to look after any valuable items for you, they will keep a record of the date you brought them, what the items are and when they are returned to you.

Your SL Carer and workers in the service will not be able to act as your agent for claiming welfare benefits or managing your finances. In the event that you are deemed via a Mental Capacity Act Assessment to be unable to manage your finances an Enduring Power of Attorney will be applied for on your behalf.

Carers will be expected to file receipts of any expenditure of £10 and over. In cases where service users do not provide receipts for example for activities where they are on their own, Carers need to complete the **Financial Agreement Form** to be countersigned by the Scheme Manager and worker.

Any expenditure over £50 will need to be agreed in advance with the SL worker and the reason for request given. Carers and Service Users will then sign the request form, which will be authorised by the Scheme worker and Manager. Service users are responsible for paying respite fees to respite Carers as appropriate. They are also responsible for paying weekly Service User contributions to Long Term Carers.

SL Carers will always keep their own money separate from yours. If they pay any of your money in to an account, this has to be an account in your own name.

If your SL Worker is involved in carrying money or valuables to and from you and/or your family and/or your SL Carers, a receipt will be signed at each handover point and then kept on your office file. You and/or your family and/or your SL Carer will be given a copy of the receipt(s) too.

SL Carers and workers and volunteers in this service must not: -

- enter in to personal financial transactions with you;
- accept money or gifts from you or your family (except for small token presents on birthdays or Christmas or similar festivals);
- borrow money from you;
- use your telephone or other things in your room/mobile phone;
- influence you in what you spend your money on when they or their families could benefit from it;

- be involved in drawing up or witnessing your will.

In the event that service users are temporarily unable to access their funds for whatever reason the SLS carer will in the first instance contact the service user's Care Manager/Social Worker to report this issue and to seek a temporary solution to the problem.

If they are unable to get hold of the Care Manager they should immediately contact their SLS worker assigned to support them. The SLS worker will immediately inform the Registered Manager to pass on the details and circumstances of what has happened and a decision will be made in the best interests of the service user.

See these other policies and procedures and documents for further information on:

- Making choices and decisions
- Confidentiality
- Health and safety
- Safeguarding against abuse and neglect.
- Safe friendships and relationships
- Service User Plan
- Individual planning, monitoring and review
- Record keeping
- Standards of conduct and practice
- Complaints and concerns
- Whistleblowing
- Training and development
- Financial Agreement Form
- Placement Agreement