

Supporting People with their Financial Affairs and Access to their Home Procedure

1. Purpose

The purpose of this procedure is to guide work practice and staff responsibilities when supporting a customer to manage their personal financial affairs and access to their home.

2. Scope

This procedure applies across Avivo.

3. Procedure

Avivo is committed to people living as valued citizens, making their own decisions, developing their own abilities and growing in their relationships. We believe people have the right to make decisions that achieves and maximises their independence. If we think a person is likely to cause themselves harm we will seek an alternative body or person to make decisions on their behalf. In providing support to people we respect that they trust us with private and personal information and access to their home.

This procedure and staffs adherence to Avivo's Code of Conduct is to protect the privacy, decision making, dignity of risk and safety of customers and staff in the following areas:

- Personal finances
- Access to the home

Personal Finances

- The way the person likes to be supported and any specific actions required by staff to assist them with their financial affairs will be documented in the person's profile and/or support plan.
- If the person needs support to manage their finances, strategies will be developed to maximise their control, choice and independence. These strategies will be detailed in the persons support plan.
- In circumstances where a person needs support to deposit or withdraw money, strategies will be put into place to safeguard account information. Wherever possible the person is supported to enter all their own private details and staff do not retain this information.
- The person maintains an accurate record of deposits and withdrawals with their financial institution. If the person is unable to monitor their own account(s) an appropriate person, such as a family member or a public trustee must monitor the accounts on behalf of the person.
- If staff shop or pay an account for a customer or the customer is not present, a receipt with any change must be provided to the customer and the customer must sign the docket book stub to verify accuracy.

Access to the Home

- If the person can't open the door to staff, Avivo will negotiate with them a safe and secure method to provide access. The way to gain access will be communicated to staff to ensure the persons safety and security is maintained.
- If the person does not open the door for support staff on a scheduled visit and cannot be raised, support staff will take reasonable steps to ensure the person is not at risk or harmed by:
 - Looking around the property to see if there is any sign of the person at home
 - Phoning the person's home number or mobile to see if they respond
 - Phone the office to report the situation
 - Wait at the home of the person for instructions on how to proceed from the Office, Coordinator or Advisor

4. Related Documents

- Privacy and Confidentiality Policy – OP-POL-74
- Guardianship & Administration Procedure – OP-PRO531
- Employee Code of Conduct

5. Definitions

None.