RIGHT ACCORD
Private Duty-Home Health Care
3900 Clark Road Suite B5, Sarasota, FL 34233
941.366.0801 | www.rightaccordhealth.com

GUIDELINES FOR HANDLING CLIENTS MONEY

The greatest care must be taken when handling money belonging to clients. These guidelines are designed to ensure client's property and cash handled by Care Providers are properly accounted for and that Caregiver's are protected in the case of a complaint.

The Caregiver confirms that the Caregiver will NOT unlawfully handle money belonging to your client(s) unless required to do so by the Client's Representative and authorized by my supervisor. The Caregiver will also respectfully decline any valuable gifts offered by the client, unless authorized by the Client's Representative and my supervisor.

GUIDELINES – PROTECTION FOR THE CLIENT AND THE CAREGIVER

It is essential that client's money is kept separate from Caregiver's personal money at all times.

If it becomes necessary for you to help with purchasing items from a store, or handling the client's money for any other reason, you must call the office at the time **WITH** the client present. Keep meticulous records of the date, the amount, and the purpose of your dealings on your log sheet and we will keep a record of it here in the office also. Always be sure you are authorized by either an office personnel or family member in advance.

A client's shopping should not be paid for by the Caregiver using cash, or credit / debit card. Funds should be provided by the client PRIOR to shopping and receipts provided to the client.

Money belonging to a client should not be processed through a Caregiver's personal bank account.

Caregiver's should not sell or buy items from clients, nor act on behalf of a third person to buy or sell from a client.

Care Providers should not arrange for members of their families to undertake paid work for clients.

Caregiver's should not engage in personal financial transactions with or on behalf of clients, e.g. lending or borrowing money.

UPDATED: 01/2020

Caregiver’s should not be involved in assisting a client making a Will, make suggestions about the disposal of any property, act as executor or witness a client's Will. Clients should be advised to consult a solicitor on these issues.

Caregiver’s should not be a beneficiary of a client’s Will. If a Caregiver believes that they are a beneficiary, this must be reported in writing to the Administrator of Right Accord.

Client's money should not be kept in the Caregiver’s possession longer than necessary to do required shopping.

A shopping list should be made and till receipt(s) kept to return to the client.

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I acknowledge that I have received this guideline and I understand that it is my responsibility to read and comply with it.

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EMPLOYEE'S NAME (printed):

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EMPLOYEE'S SIGNATURE:

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DATE:

UPDATED: 01/2020