



HS10	Healthy and Safe Services	Financial Support Policy and Procedures
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<b>What this policy aims to do</b>	Ensure service users have as much control as possible over their own money and that staff are completely transparent in everything to do with people's financial affairs
<b>Who this policy applies to</b>	People who use any MASS service and all staff
<b>Who is responsible for carrying out this policy</b>	Managers responsible for the service delivery
<b>What words used in this policy mean</b>	'Property' is the term used to refer to any financial asset a person might own including cash, investments, land or buildings
<b>Legislation this policy is based on</b>	<a href="#">National Disability Service Standards</a> DHHS Human Services Standards
<b>Other relevant policies</b>	A2 Decision Making and Choice HS9 Guardians and Administrators

Version	Date	Author/Editor	Approved by	Notes
1.0	26/8/2016	Peter Lane		
1.1	31/5/2018	D Stephenson		Update format
1.2	17/6/2020	D Stephenson	S. Reeves	Annual Review. No change.

## Financial Support Policy

MASS will encourage adult clients to take as much responsibility as they can for managing their own money and will provide the support they need to act on their financial choices.

MASS staff will make sure adult clients make decisions about their own money as far as possible, as agreed in writing as part of each person's individual plan. All adult clients will have their own bank account/s, and will have their regular income paid into these account/s.

MASS staff will provide support and encouragement for people to improve their money management skills and will help to ensure money, financial information and belongings are kept secure.

If a person using MASS services does not directly manage their own money, MASS staff will respect the decisions of their legal guardian/administrator or will support people managing money as agreed in their individual plan, under strict guidelines.

MASS will never manage a person's finances. Where a person does not have capacity to manage their own finances and a person responsible is not nominated, an application will be made to VCAT to appoint an Administrator.

## Financial Support Procedures

### Individual financial management

- ☑ MASS staff will make sure adult service users can make decisions about their own money as far as possible, and will document this in the individual plan
- ☑ MASS staff will provide support and encouragement for people to improve their money management skills
- ☑ Adult clients will have their own bank account, and will have their regular income paid into their account
- ☑ MASS staff will support adult clients to develop a written agreement about how their money will be managed, and if they want support, what activities they want support with and who they want to give that support
- ☑ If necessary, MASS staff will provide a form for people (or their guardians/administrators) to sign authorising direct debits for fees or other service charges - or if the person prefers, they can make transfers from their account when payments are due
- ☑ Personal items will be bought using people's own money
- ☑ MASS staff will help make sure adult clients keep their money, financial information and belongings secure
- ☑ Wherever possible, MASS staff will not take responsibility for handling money belonging to service users
- ☑ MASS staff will encourage people not to keep large amounts of cash in their house. In supported accommodation, staff will encourage people to keep money in a locked drawer in their room, or a locked cash box (the person who owns the money should hold the key)
- ☑ If anyone opens a locked cash tin or drawer other than the person who owns the money, a witness is there to observe and record this access
- ☑ If asked, MASS staff will provide people with information about options for getting independent financial advice, help people understand information they've been given by banks or other financial institutions and attend appointments to provide support
- ☑ MASS staff will provide service users with information about payment options for paying bills, and support for payments and payment plans, if the person they support agrees
- ☑ MASS staff will not:
  - be co-signatories to bank accounts held by clients
  - provide any financial investment advice to clients
  - use money, bank accounts or other financial assets owned by clients for their own personal use, even if these are offered to them
  - lend money to or borrow money from clients
  - be involved in creating a will for a client
  - knowingly benefit from the will of a client.

- If MASS purchases an item on behalf of a service user, the date, item, amount, seller and full name of the staff person, position and signature will be recorded along with the receipt in a personal record for each person.