




Aurora Kilkenny

Persons Supported Personal Property, Finances & Possessions Policy

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Mission Statement

Enable people with complex needs to experience the same rights as every other citizen and as equal members of the community.

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1. Policy Statement

In line with Aurora Mission and Vision, this policy contains procedures in respect of Person supported finances and private property. These procedures and policies apply to all aspects of the service and designated centres within Aurora.

Aurora adopts a Human Rights-Based Approach underpinned by the FREDA principles (Fairness, Respect, Equality, Dignity and Autonomy) to ensure the person's rights are protected and promoted.

The Human Rights Based Approach guides all employees in ensuring people living in Aurora are supported to manage their finances and provide support and training to develop skills to manage their own finances.

2. Policy Scope

2.1. This policy applies to all employees in Aurora and any other persons required to support people living in Aurora regarding their personal belongings, property or finances.

2.2. The policy provides guidance for employees in relation to supporting people in managing their finances.

3. Policy Purpose and legal background

3.1 As per Health Act 2007 (Care and support of residents [person Supported] in designated centres for persons with disabilities) Regulation 2013, Schedule 5 outlines that all designated centres are required to develop and maintain a policy in respect to "Residents [Person Supported] personal property, personal finances and possessions".

3.2 Regulation 12 - Personal Possessions, outlines as follows: -

- (a) The person in charge shall ensure that, as far as reasonably practicable, each person supported has access to and retains control of personal property and possessions and, where necessary, support is provided to manage their financial affairs.
- (b) The person in charge shall ensure that, as far as reasonably practicable, persons supported can bring their own furniture and furnishings into the rooms they occupy.
- (c) The person in charge shall ensure that:
 - each person supported uses and retains control over his or her clothes:
 - each person supported is supported to manage his or her laundry in accordance with his or her needs and wishes:
 - where necessary, each person supported linen and clothes are laundered regularly and returned to that person supported:
 - each person supported has adequate space to store and maintain his or her clothes and personal property and possessions.

(d) The registered provider shall ensure that he or she, or any staff member, shall not pay money belonging to any person supported into an account held in a financial institution unless:

- the consent of the person supported has been obtained
- the account is in the name of the person supported to which the money belongs:
- the account is not used by the registered provider in connection with the carrying on or management of the designated centre.

3.3. The purpose of this Aurora policy is to set out the procedures to be followed by Aurora employees regarding the supports of the person supported private property, belongings and finances.

3.4. The Aurora policy outlines the steps and processes that shall be taken to ensure the interests of the person supported are protected and to give clear guidance to employees in the management of person supported' property in line with the Aurora Personal Plan Framework.

3.5. This document provides clear guidelines on the use of funds for the benefit of person supported, particularly where a person supported may require support with managing or make decisions regarding their finances.

3.6. The Personal Plan provides a framework where the person supported finances are documented and outlines the level of support a person requires to manage their money and financial planning in line the annual review and visioning document to ensure spending is in line with their roles and goals. All financial supports are guided by Aurora Theory of Practice "Social Role Valorisation".

4. Assessment of and competencies in making financial decisions.

4.1. Aurora ADM focused group have reviewed the Money Management Competency Assessment Form in line with the ADM legislation and do not believe it currently serves the people we support at this time. To this end, the competency assessment is removed from each person's file.

4.2. The focus group will with a view to supporting people in decision-making across all areas of their lives and implement a Quality Initiative that will outline the guidance and tools to use to support decision-making.

4.3. A person who the courts decided was not able to look after their own affairs before 26 April 2023 was made a ward of court. Decisions including financial decisions were made on their behalf by the court or a person appointed by the court known as the committee.

Since 26 April 2023, applications for adults to become a ward of court can no longer be made. The Assisted Decision-Making (Capacity) Act 2015 sets out a new system for helping people who are having difficulty because they have reduced or no capacity. There are various different types of Decision Support Arrangements which depend on the level of capacity at the time the decision has to be made. Over the next 2 years or so, adult wards of court will have their cases reviewed by the court and will move over to a new decision support arrangement, if necessary. An application can be made to court by the ward, the ward's committee or a close relative, friend or service provider to have the wardship discharged more quickly.

- 4.4. In relation to wards of court, directions shall be sought from the wards of court office and requests for funds directed to them.
- 4.5. In the case of a Court Appointed committee, the specifics of the actual authorization shall be confirmed. Aurora will request this confirmation in writing.

5. Financial services /Aurora Position Paper

- 5.1. People supported are encouraged and facilitated to use the financial services available in the community as far as possible. Aurora has commenced a working group "Person Supported bank accounts" in September 2021 to partner with financial institutions exploring options in implementing bank accounts for each person supported in line with regulations. A position paper [Appendix 38] on the outcomes of this exploration is available with the provider. Aurora will explore the options arising with final implementation of the Assisted Decision-Making Capacity Act in 2015
- 5.2. The use of bank accounts and cash cards should be evaluated and discussed with the person supported in an accessible format.
- 5.3. In the case of a person not meeting the criteria to operate a bank account, Aurora Finance Accountant is acting as an agent for the person's income and ensure all safeguards are in place to manage person's finances. The person supported has access to his/her finances through Aurora finance pathway.

- 5.4. The majority of the people supported by Aurora do not meet the current criteria set down by financial institutions to apply and sign for their own bank account. Financial Institutions are involved in working groups with stakeholders to address this in line with the Assisted Decision-Making Capacity Act 2015. It is unlikely that non formalized decision support arrangements in place will suffice to open a bank account and the formalised decision support arrangement of Decision-Making Representative, appointed by the court will be necessary. This decision is pending.
- 5.5. Bank statements are provided to the person supported regularly. The support team ensure bank statements are reviewed and communicated with person supported and filed within person supported finance folder.
This information is available to families during visits to the person's home, if they wish (please refer to Ways of Working "How to communicate person's finances with family members) [Appendix 30]

6. Definition of Person supported 's Private Property

- 6.1. A Person supported 's Private Property account is defined in Section 2 of the Health (Repayment Scheme) Act 2006 as:
"patient's private property account means so much of the money and personal property of-a person provided with in person supported services referred to in Section 53 of the Health Act 1970 (as amended by section 4 of the Health (Amendment) Act 2005), a person provided with institutional assistance under Section 54 of the Health Act 1953, a person in residence used wholly or partly as a setting to provide care for persons with physical or mental disability, or a person otherwise being cared for by, or on behalf of, the Executive due to a physical or mental disability or ill health, that is managed, on behalf of that person, by the Executive or by another person under an arrangement with the Executive whether before, on or after the commencement of Section 9."

6.2. The following clarifies the above definition of person supported 's private property and includes examples of personal items such as:



6.3. It is the responsibility of all Aurora employees to limit any loss or damage to a person supported property and personal items.

6.4. Proper records of person's private property should be retained. All items owned by the person supported must be recorded on the Asset List [Appendix 6]. All items should be stored in a secure area. Procedures around the receipt and storage of valuables must be followed in line with Aurora Finance Pathways and Documentation.

6.5. Property may also include monies or documents such as birth certificate, passport, pension books, Bank/Credit Union books and legal documents etc must be held in safe keeping on behalf of the person supported.

7. Person Supported Entitlements

7.1. Prior to admission Aurora ascertains the financial status of a person supported. This is part of the admission process.

7.2. Once a person is admitted to Aurora, he / she will be informed and supported to claim entitlement from one of the following sources: -



- 7.3. Assistance and support will be given to the person supported in completing all the necessary documentation in relation to securing their full entitlements.
- 7.4. Records must be kept of each Person Supported entitlements financial or otherwise which should not only detail what those entitlements are but also highlight dates for renewals or changes especially where benefits are not automatically increased and or renewed.
Due to the current system of Aurora managing person's moneys, records and statements of those entitlements are kept with Aurora finance department. An Entitlements, Income and Expenditure form [Appendix 2] will be completed when the person joins aurora services or for people who have been with Aurora for some time the form will be completed by the person supported and their PIC/Team Leader. These entitlements Income and expenditures should be reflected in the Person Supported Annual Spending Plan.
- 7.5. People supported can access those records and statements at any time and should also be outlined on the person's annual spending plan.
- 7.6. Entitlements received by a person supported is the property of the person and should be treated in such a manner.
- 7.7. The person supported has the right to use and have access to their personal money and property as they wish.

8. Person supported Charges and Refunds

8.1. Legislative Framework

"RSSMAC Regulations" or "the Regulations" means the health (Residential Support Services Maintenance and Accommodation Contributions) Regulations 2016 (S.I. No.467 of 2016) as amended by the health (Residential Support Services Maintenance and Accommodation Contributions) (Amendment) Regulations 2019 (S.I. No. 106 of 2019).

The legislative framework "RSSMAC Regulation" guide the Health Service Executive (HSE) and providers of residential support services on the HSE's behalf ("section 38 agencies"), to correctly determine the income related Standard RSSMACs required to be paid by people supported using a service. Providers must ensure that the operation of the RSSMAC framework is in accordance with the RSSMAC legislation and guidelines, and internal HSE National Financial Regulations and standards.

8.2. Charges

The regulations provide the statutory basis for the imposition of charges for persons in receipt of services whether or not such persons have full or limited eligibility. The regulations provide for different classes of person on whom charges can be levied and the maximum charge which can be imposed in respect of each class.

Aurora Long Stay Contributions are as follows:

Class A

Class B

Class C

- 8.3. All charges are included in the Provision of Service Documentation and are communicated to each person supported, which is evident on their individualised Easy Read documentation. [Appendix 32, 33, 34, 35].
- 8.4. Assessment of Ability to Pay Charges: The regulations provide for an Assessment Form to be completed by the person supported on the relevant charge. Assessment Forms should be filed on each Person Supported file.
- 8.5. Allowable Expenses: Charges may be reduced or waived in order to avoid undue financial hardship having regard to the person's financial circumstances. Expenses may be allowable when calculating the appropriate charge (as per list in Long Stay Contributions).
- 8.6. Documentary Evidence: Where expenses are being allowed as part of the assessment process, documentary evidence should be obtained and attached to the assessment file.
- 8.7. Appeals: In cases where the person supported or their family member as appropriate, are dissatisfied with the Authorised Officer's decision regarding the amount of the charge, they may appeal the decision to the relevant Appeals Officer. The person supported, should be advised of the appeals process on being notified of the charge.
- 8.8. Refunds of Charges for Home Visits: Aurora makes a refund of charges to the person supported. Where the person supported spends a night at home. This is called a "bed night" and each "bed night" is refunded at the daily rate charged to the person supported.
- 8.9. Full Guidelines on charges and refunds is available on:
<https://www.hse.ie/eng/services/news/newsfeatures/longstaycontributions/national-rssmacs-general-implementation-guidelines.pdf>

9. Patient Private Property Accounts (PPPA) Guidelines

- 9.1. The Health Service Executive (HSE) operates in excess of 15,000 Patients' Private Property Accounts (PPPA's) for clients at over 170 locations nationally. These accounts are generally held on behalf of people who live in long term residential care, primarily within the following services:
- Older People
 - Mental Health
 - Intellectual Disability
 - Physical and Sensory Disability
 - Acute Hospitals (long stay)
- 9.2. The purpose of this document is to set out the procedure to be followed by HSE employees, or agents, in the administration of clients' patients' private property.
- 9.3. The following Guidelines set out the steps that must be taken to ensure that the interests of the client are protected and gives clear guidance to HSE employees in the management of clients' property in the care of the HSE. This document provides clear guidance on the use of funds for the benefit of clients, particularly where a client may not have full capacity to manage, or to make decisions around the best use of their funds.
- 9.4. Aurora assumes the role of Trustee in the administration of the financial affairs of people supported living in Aurora:
- (a) A record of the person supported is held within the service.
 - (b) Funds held by aurora are safeguarded for their direct benefit and their benefit alone.
 - (c) Each Person Supported ability to derive benefit from any item or service that might potentially be purchased using their funds must be assessed in the context of the User's overall Care Plan.
 - (a) It is imperative that there is a clear audit trail distinguishing individual's transactions and funds.
 - (b) It should be noted that funds raised by Aurora from Charges correctly levied under relevant legislation are Aurora funds and cease to be the Person Supported funds once collected.
- 9.5. Support for Staff in Making Decisions:
- (a) Reference should be made to the Person supported Private Property Guidelines of the HSE and the Health (Charges for In-Person supported services) (Amendment) Regulations 2011).

- (b) Staff should consult with their PIC/Team Leaders in the first instance and the request should be certified by the PIC/Team Leader before presenting it to the Director of Finance.
- (c) The Director of Finance should give reference to 1 and 2 above and subsequently check the PPPA that adequate funds are available.

9.6. Appeals

Any appeal must be made in writing to the CEO.

Full guidelines available on:

<https://www.hse.ie/eng/services/list/4/olderpeople/pppaccounts/>

<https://www.hse.ie/eng/services/list/4/olderpeople/pppaccounts/patients-private-property-guidelines.pdf>

10.Roles and Responsibilities

10.1. There is a duty on all **Aurora Employees** to safeguard the person supported finances and their property. To ensure this an appropriate governance and management structure is in place:

- (a) Aurora persons supported personal property, finances & possessions policy and Finance Pathway [Appendix 31]
- (b) Aurora Provider Audits:
 - Annual Review
 - 6 Monthly Provider Unannounced Audits by Aurora Finance Department Auditor
- (c) PIC/Delegated person monthly review of person supported finances
- (d) Personal Planning Framework incorporating:
 - Person Supported Finance File
 - Entitlements, Income and Expenditure Form [Appendix 5]
 - Annual Spending Plan [Appendix 10]
 - Daily Day & Night Finance Checks [Appendix 6 & 7]
 - Person Supported Finance Error form [Appendix 16]
 - Clearly defined responsibilities of PIC/Team Leader, keyworkers and team members i.e. signing off on financial transactions etc.
 - Circle of support meeting minutes as required.

10.2. **Director of Finance / Finance Department:**

- To ensure and oversee effective governance and management regarding people supported finances. The Finance department supports the Director of Finance in effective governance & management of person's finances and provide supports to persons supported and their staff teams by:
 1. implement and monitor electronic system of managing persons supported finances such as Soldo Cards.
 2. support all people living in Aurora to access their finances
 3. complete a comprehensive review of persons supported quarterly bank statements before issue to Person Supported.
 4. complete 6 monthly or as required finance audits as part of provider audits

- Person Supported funds held in the PPPA [Patient Private Property Accounts] [Appendix 36] belong to the person supported and no other person. Aurora has an implied trustee relationship with its person supported in respect of those funds.
- If these funds are deposited into a deposit account any net interest earned on these funds belongs to the person supported.
- Aurora is committed to promoting the independence of the people supported to the greatest extent possible, consistent with the provision of safe and appropriate supports. In this context the person supported are encouraged and supported to make their own arrangements regarding safekeeping of their funds. However, where necessary Aurora offers the PPPA service.
- Aurora has a computerized system in place to ensure finances are properly recorded and transactions within the account held by it in safekeeping for person supported are open and transparent. Aurora Access to Private Patient Account Pathway explains how to support a person to access their PPPA moneys.
- The guidelines provided by the HSE are the main reference for guidance in relation to managing person supported' funds

10.3. **Wellness, Culture, Integration Managers (WCIM):** The WCI Managers, within their remit as registered PPIM for a designated centre attend annual reviews and visioning meetings as per the Aurora Personal Planning Framework and ensure oversight by monitoring the management of the person supported finances through governance meetings with the PIC/Team Leader. Ensure oversight of Person Supported spending by reviewing 6-month provider audits and annual reviews.

10.4. PIC/Team Leader

- (a) The PIC/Team Leader of the designated centre where the person supported resides ensures that all employees with responsibility for the day-to-day handling of the person supported' property and money are aware of this policy and their responsibilities, the relevant HIQA regulations Aurora policy and related Aurora Finance Pathways and to ensure:
- (i) The PIC/Team Leader has the responsibility to complete and/or oversee the following duties (as per Aurora Finance Pathway):
1. The PIC/Team Leader completes a monthly audit on the person supported finances ensuring spending is in line with the person supported roles and goals etc.
 2. The Entitlements, Income and Expenditure form [Appendix 2] is completed and the reflected of the current finance circumstances of the person.
 3. The Annual Spending plan [Appendix 10] is discussed and agreed at the annual review and visioning meeting and is reflective of the current roles and goals of the person supported, and signed by the PIC/Team Leader.
 4. The Cash Expenditure sheet [Appendix 17] is on file and completed as per policy:
 - a. All entries signed off by staff
 - b. Receipt attached for each entry
 - c. Closing balance agrees to wallet/purse
 - d. Delegated person signs off on daily day and night check form [Appendix 6 & 7]
 - e. The Assets list is in place and up to date and a visual check completed as items are purchased. [Appendix 8]
 - f. That spending is in line with identified roles and goals as outlined in the person supported annual review and visioning minutes and reviewed monthly.
 - g. Complete monthly finance audits on the person supported finances.
 - h. Ensure that quarterly finance statements from the finance department are cross referenced with the Entitlements, Income and Expenditure form to ensure charges are correct.
 - i. A Review and sign all finance related Risk Assessments
 - j. Ensure where there is a restriction to accessing finances that a restrictive practice risk assessment is in place, signed by the PIC/Team Lead and all members of the staff team
 - k. Have oversight and manage the Person Supported cash error forms as required and complete the following:
 - i. Inform the person support of any concerns.
 - ii. report any financial concerns to the WCI Manager.
 - iii. Inform the income officer/finance department.
 - iv. Complete an incident form.
 - v. Inform the safeguarding team as required.
 - vi. Notify HIQA as required.

10.5. Employees

(a) All Aurora employees, are required to make themselves familiar with the content of the Aurora Persons Supported Personal Property, Finances & Possessions Policy and related pathways and its implementation. This also applies to anyone who influences or is involved in decisions in relation to person supported funds.

(b) Those employees who are in direct support:

- Complete the Entitlements, Income and Expenditure Form [Appendix 2] and ensure it is reflective of the person supported current financial circumstances
- Develop an Annual Spending Plan in conjunction with the person as part of the person's annual review and visioning meeting (in line with Regulation 5, Health Act)
- Ensure the person supported is encouraged and supported to participate in management of their finances and is made aware of any decisions in relation to their finances.
- Discuss Person's Finances/quality of spending as part of Personal Plan annual and monthly reviews and ensure spending is in line with the persons Roles & Goals.
- Develop a Risk assessment regarding Person's Finances ensuring that it is read and signed by all members of the staff team and PIC/Team Leader.
- Ensure where there is a restriction to accessing finances that a restrictive practice risk assessment is in place, signed by the PIC/Team Lead and all members of the staff team
- Support the person to check their finances twice a day as part of handover documented on Person's Finances Day & Night Check Form [Appendix 6 & 7]
- Ensure all possessions are recorded on the Asset list, update following every purchase, and record when items are disposed of. [Appendix 8]
- Cash Transactions:
 1. All expenditure and income must be recorded on the expenditure sheet [Appendix 17]
 2. Where two or more staff are on duty two staff must sign the expenditure sheet. Where one staff is on duty, one signature is allowed.
 3. The PIC/Team Lead must review and sign the expenditure sheet throughout the month.
 4. Number each receipt and enter this number on the Person's expenditure sheet.
 5. If there is a discrepancy, check all documentation, monies and assets thoroughly, if discrepancy cannot be rectified, report to Line Manager immediately by completing a person supported cash error form. [Appendix 16].

- Soldo Cards:
 1. Number receipt to confirm purchase, add matching number to the Soldo Statement transaction.
 2. Attach receipts to the statement for crosschecking by PIC
 3. Print emails regarding extra funds request to advise monies lodged
 4. Complete morning balance check on card to ensure sufficient funds for the day [Appendix 21]
- If there is a discrepancy, check all documentation, monies and assets thoroughly, if discrepancy cannot be rectified, report to the PIC/Team Leader immediately by filling in the person supported finance error form. [Appendix 16].
- Person Supported finances may only be used to purchase items or services for that person. It is not permitted to use one person supported funds to purchase an item or service for another person supported.
- Ensure items purchased are recorded on the Asset List. [Appendix 8]
- Ensure all occasions when the person supported has availed of the Aurora Transport vehicles are recorded on the Person Supported Travel Expenses Form [Appendix 11] and submit to the finance department on a weekly basis. [one person supported only travel expenses to be recorded on each form].

11.Completion of the Person Supported Annual Financial Plan

11.1 In line with the Personal Planning Framework the PIC/Team leader or designated staff team support the person to develop an annual financial plan to ensure that sufficient finances are available to support the person throughout the following year to live a good quality of life in line with their roles and goals within their financial means.

(a) The annual financial plan will outline the following:

- a. Balance brought forward from previous year
- b. Annual expected income for coming year
- c. Expected expenditure for the coming year
 - i. Personal Items
 - ii. Discretionary Spending
 - iii. Holidays
 - iv. Social Activities

(b) Expected Closing balance for this year

11.2 The keyworker and support team with the person supported ensure the annual financial plan is reviewed and updated prior to and in preparation for the person supported annual review and visioning meeting.

11.3 The Annual Spending Plan is required to be reviewed, signed and dated by the Keyworker and the Person in Charge/Team Leader

12. Person Supported Expenses / Withdrawals of Money

- 12.1 As part of person-centred planning, it is essential that each support team provides intentional opportunities for each person supported to develop their skills in managing their own money, through the following:
- (a) Involve each person in counting and checking their personal money on a daily basis
 - (b) Encourage and support engagement in commercial settings such as shops and restaurants i.e., paying for their own items in order to support learning, development and independence.
 - (c) Explore role and skill development with each person through their annual review and visioning meeting, monthly reviews and focus on future planning meetings.

13. Soldo Cards

- 13.1
- (a) Soldo cards should be stored safely and securely similar to cash
 - (d) All expenditure on the soldo card should be documented in line with the Soldo card Responsibilities pathways. [Appendix 22 A & B]
 - (e) Every person supported has a Soldo card. This card works similar to a debit card and can be used in all shops and online.
 - (f) There is a facility to withdraw cash on the cards however cash is still available as per the Person Supported resource requirement form [Appendix 18] and pathway [Appendix 20]. Cash withdrawn from the SOLDO card at the ATM must be recorded on the cash expenditure sheet as income and identified as "Soldo ATM withdrawal".
 - (g) Cards are automatically topped up every Wednesday morning to approved level. If extra funds are required, please follow the person supported resource pathway. [Appendix 22]

14. Gifts of Cash & Non-Cash Gifts

- 14.1 When a person supported receives a gift or inheritance the following procedure must be followed:
- Gifts – cash or belongings.
 - On receipt of cash the amount must be recorded on the person supported Expenditure sheet as income and signed by two staff.
 - Expenditure sheet must be signed by the PIC/Team Lead.
 - The cash should be stored securely in the person supported home until it can be brought to the Finance Department for lodging in the person supported account.

- The cash amount must be recorded on the person supported expenditure form as expenditure, document it has been lodged to the finance department for lodging to the person supported account, this transaction must be signed by two staff and approved by the PIC/Team Lead.
- A receipt will be issued by the finance department. This receipt must be filed in the person supported finance folder.
- Vouchers for specific shops such as “Dunnes Stores” or “One for All” vouchers are considered cash and must be recorded in the expenditure form as income and when spent recorded as expenditure as above.
- All gifts received should be logged on the Person Supported Asset List.

15. Inheritances

- 15.1 All correspondence received by a person supported regarding an inheritance should be brought to the attention of the PIC/Team Lead, WCI Manager and the Director of Finance.
- 15.2 All correspondence must firstly be discussed with the Person Supported in a means that is appropriate to their communication preferences.
- 15.3 A copy of the correspondence must be placed on the Person Supported File
- 15.4 Documentation must be forwarded to the PIC/Team Lead, WCI Manager and the Director of Finance for review and to ensure that all necessary steps are taken to ensure that the inheritance is received and lodge into the person supported account and that all legal obligations are administered i.e., Revenue.

16. Person Supported Asset List [Appendix 8]

- 16.1 The personal property of each person supported in Aurora will be treated with due care and diligence at all times and information will be held on a Persons Asset List.
- 16.2 The staff team will ensure that the Asset List for each person supported will be held in hard copy format in their personal file and reviewed on a monthly basis as part of their Personal Plan monthly review. This Asset List will be accessible to person supported, support staff, designated family members and inspectorate personnel.
- 16.3 Personal property may be purchased by the person supported or gifted by a friend or family member. Items such as toiletries and food are not required to be added to the asset list. Items such as clothing, bedding, furniture, perfumes, jewellery, CD's etc must be added to the list. [number of items i.e. jumpers etc is sufficient].

16.4 To sustain the usefulness of the Persons Asset List, it is vital to maintain and update it; to this end Aurora has the following process in place:

- The PIC/Team Lead or designated person will review each person's Asset List on a monthly basis ensuring that it is up to date containing an accurate description of the property owned by the person supported and items disposed of.
- On the completion of each review and update the asset list must be signed and dated by the PIC/TL or designated person.

16.5 Where there is a concern in relation to a person's personal property the PIC/Team Leader, Director of Finance, WCI manager and Director of Services will be contacted in relation to any concerns about the lack of safe keeping or exclusive use of private property of any person supported in Aurora and it will be recorded as a formal complaint under Aurora Compliments, Comments and Complaints procedure and investigated by the designated complaints officer.

17.Procedure for checking and auditing person supported finance

17.1 Aurora Finance Pathway [Appendix 44] is a comprehensive system to safeguard person's finances and property and ensure good governance & management when supporting people in managing their finances and property.

17.2 It is the responsibility of all employees to protect people supported from financial abuse by adhering to this policy.

17.3 Financial audits shall be completed as per Aurora Finance pathway by:

- staff team through daily/nightly checks of person's finances
- PIC oversight on expenditure sheets monthly.
- PIC & staff team through monthly finance audits
- annual and monthly Personal Plan reviews
- PIC/Team Lead oversight by attendance at annual and monthly reviews.
- 6 monthly provider audits completed by the aurora finance team and reviewed by the PIC/Team Lead
- PIC attendance at weekly focus on future planning meetings.

18.Reporting of Irregularities

18.1 It is the responsibility of all employees to ensure the person's finances are correct at the end of each shift. Any anomalies must be reported immediately by completing the Person Supported finance Error Form [Appendix 16]. Error Forms must be signed by the PIC or Team Leader, or in his/her absence the relevant WCI Manager. All Error Forms must be sent to the Income Officer for review and approval from the Director of Finance.

- 18.2 Any member of staff who is aware of a confirmed or suspected irregularity or unaccounted cash errors that may indicate a misappropriation of funds or an instance of fraud should report this immediately to their PIC/Team Leader.
- 18.3 A copy of the Person Supported Error Form will be filed in the Finance Office and a copy filed in the person supported finance folder.
- 18.4 Anomalies include as follows:
- A missing receipt.
 - A hand written receipt [other than previously approved].
 - Cash available not in accordance with the Person supported Expenditure sheet.
 - Spending outside the norm for the person supported
 - Items purchased not available in the house, appear to be lost or stolen.
- 18.5 When the PIC/Team Leader cannot identify and resolve the error in relation to the missing funds/item, an incident form and safeguarding internal notification must be completed. An investigation process may be instigated. And Garda Siochanna and HIQA to be notified as part of the safeguarding process.
- 18.6 An audit of the person supported finances may be completed by the finance team.
- 18.7 Aurora may commission an audit of person supported finances by an independent external agency / organization as part of the external finance audit of the company. As part of this external audit the external agency will provide confirmation that the funds have been audited and if any discrepancies have been found.

19. Person supported Funds versus Aurora Funds - Who should pay for what?

- 19.1 As we support people within their homes and within community settings, we need to consider what our support role looks like. Having meals together both at home and out and about with the people we support is normative and encouraged. Aurora must ensure that how we support people is transparent and provides value for money.
- 19.2 It is incumbent on all employees who are involved in meal planning and shopping to do so from a balanced nutritional perspective, inclusive of dietary requirements and in a most person-centred and also cost-effective manner.

Outlined below are some scenarios to clarify purchases and responsibilities for payment:

Coffee Shop Visits	If a person supported is going to the coffee shop for coffee and cake, they pay for this refreshment themselves. It is expected the staff member will also order a drink and accompany them during their refreshments. Aurora will cover the cost for a drink to the value of €3.00 but if the employee wishes to have food also then they pay for this themselves.
Community Refreshments	If a person is supported to purchase additional items whilst out e.g., take away drinks, minerals, ice-creams they will pay for this themselves and if staff wish to purchase also, they pay for this themselves.
Meals Out	If a person supported is going to a restaurant/cafe for a meal, they pay for this themselves. We expect the employee to also order a drink/food and accompany them during their refreshments. Aurora will cover the cost for a food/drink to the value of €8.00 but if the staff member wishes to have food/drink that costs more than this they pay the balance themselves.
Cinema/Concert Visit	Going to the Cinema the person supported will be supported to pay for their own entrance ticket and snacks. Aurora will pay for the staff members entrance tickets only. If the staff members wish to have snacks, then they pay for these themselves.
House Meals	Aurora provides a budget for house groceries (in line with the dietary needs of the people supported), this budget facilitates the purchases of meals that can be shared collectively between the people supported and employees Aurora do not provide the budget for specific staff dietary requirements. Employees must not cook separate or different meals for themselves – they are welcome to the meal on offer or they provide their own food.
Take Away Meals	<p>The person may choose to have a take away meal and will pay for this themselves. Aurora do not pay for take-aways but employees can purchase their own if they wish or alternatively eat something from the house groceries at the same time.</p> <p>Aurora Operations team and Finance department actively review all receipts and quality of spend to ensure that Aurora and the supported person's expenditure is in line with the above narrative.</p> <p>All takeaways and eating out must be in line with people's dietary and nutritional requirements. Disproportionate amount of take-aways or meals out is not considered in line with support people's health and financial well-being.</p>

	All employees should consider what is the normal, proportionate practices of other citizens with regard to a person’s financial means, social and health needs.
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<p style="text-align: center;">Other Items</p> <p>With regard to “who pays for what” other items people may want or need please see lists.</p>	Person Supported Own Monies
	<ul style="list-style-type: none"> ➤ Sweets and treats ➤ Toiletries incl. sun cream ➤ Transport for social activities – Taxis or through T & T in Aurora vehicles ➤ Social Activities – entry costs etc ➤ Magazines, newspapers, books, DVD’s, cd’s ➤ Mass cards, church donations ➤ Photographs, canvas, frames, pictures for personalisation ➤ Arts, crafts, hobbies - items ➤ Furniture over and above standard bedroom furniture ➤ Bed linen, towels etc ➤ Clothes ➤ Take away meals ➤ Meals Out ➤ Clothes alterations ➤ GMS levies up to €40 per month ➤ Dental & Doctor Consultations ➤ Celebrations (incl. of cakes, gifts etc) ➤ Holidays – Refer to holiday policy
	Aurora House Float/Funds
	<ul style="list-style-type: none"> ➤ House Groceries ➤ Household items ➤ Entry costs to social activities for staff only ➤ Employee snack/meal entitlements as above 12.1 & 12.3 ➤ Furniture for communal areas ➤ Standard bedroom furniture

Appendices.

All Appendices are available on the Aurora Q Drive.

Service Provision Documentation

Appendix 1 - Part 1 Service Provision Agreement

Appendix 2 - Part 2 001- Ways of working - Provision of Service -

Appendix 3 - Part 3 Service Provision easy read version -

Appendix 4 - Part 4 Acknowledgement of Review for Contract of Service Provision

Person Supported Finances

Appendix 5 - Entitlements Income and Expenditure Form

Appendix 6 - Person Supported Finances Daily Check Sheet - Day (monthly)

Appendix 7 - Person Supported Finances Daily Check Sheet- Night (monthly)

Appendix 8 - Persons Asset List

Appendix 9 - Person Supported Monthly Finance Audit (House Audit)

Appendix 10 - Person Supported Annual Spending Plan

Appendix 11 - Person Supported Travel Expenses Form

Appendix 12 - Designated Centre Holiday Planning Form

Appendix 13 - Person Supported Holiday Planning Form

Appendix 14 - Person Supported Holiday Resource Form

Appendix 15 - Person Supported Finance Folder Index

Appendix 16 - Person Supported Finance Error Form

Appendix 17 - Person Supported Cash Expenditure sheet

Appendix 18 - Person Supported Resource Requirement Form

Appendix 19 - Person Supported Resource Pathway

Appendix 20 - Person Supported Finances Pathway

Appendix 21 - Person Supported Soldo Daily Balance Check

Appendix 22A - Soldo Card Responsibilities Pathway Person Supported August 23

Appendix 22B – Guidance for Soldo Cash Withdrawals and Rent

Designated Centre Finances

Appendix 23 - Soldo Daily Balance Check 10.10.2023

Appendix 24 - Soldo Card Responsibilities Pathway 10.10.2023

Appendix 25 - Designated Centre Resource Requirement Form January 10.10.2023

Appendix 26 - Financial Procedures when Supporting people within the Community 10.10.2023

Appendix 27 - Designated Centre IT Requirement Form June 10.10.2023

Appendix 28 - House Finance Index 10.10.2023

Appendix 29 - Designated Centre Resource Requirements Pathway