



Money Handling Guide

My Care Match acknowledges that there may be instances where support workers need to assist clients with handling money. In these situations, it is essential to maintain transparency, honesty, and accountability while ensuring that professional boundaries are never compromised. Support workers must take all possible measures to minimize the risk of appearing to engage in compromising or unprofessional conduct.

Please note that under no circumstances are you to provide financial advice or assist your client in the management of their financial affairs.

Consent and Agreement

Support workers should only manage money if they have received explicit permission from the individual they are assisting or from their guardian. To ensure clarity and understanding, a written confirmation outlining the requirements should be shared among all parties involved.

Budgets and Plans

It can be a good idea to ask your client to provide a money handling guide or budget, this will help to ensure clear guidelines are set.

These budgets and plans might include:

- Guidelines and limitations on what money can be spent on
- Daily/Weekly spending limits
- Other persons who may need to be involved in larger purchases

Record Keeping

Clients and support workers should mutually agree on methods for tracking spending. We recommend that, at a minimum, receipts should be kept for every transaction.

Security of cash, cards and PIN numbers

Support workers should establish safe and secure procedures for handling the cash, cards, and PIN numbers of any client they assist with money management. Support workers should always accommodate the Client's preferred methods wherever possible.

Support Workers' Expenses

The reimbursement of additional expenses incurred by a support worker throughout the course of a shift should be discussed and agreed upon by both parties during the meet & greet or at the very start of the relationship.

Support workers should provide and/or pay for their own meal during the course of a shift, except in circumstances where they are unable to do so because of the nature of the shift.

Payment for these additional expenses must be managed by direct arrangement between the support worker and the client.

Gifts and Loans

Support workers should not give, ask for, or accept gifts, loans, or inducements from clients or their support networks. Doing so blurs professional boundaries and can influence decision-making and service provision.

Clients and support workers may decide to exchange small, tokenistic gifts, such as a card or box of chocolates as a "thank you" or for special events. These gifts should not exceed a value of \$20-\$30.

If you have any questions, please contact:
contact@mycarematch.com.au 0481 112 928.