

Handling Service Users Money Policy

Policy Management	
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Date of Last Review: <i>July 2025</i>	
Date of Next Review: <i>July 2026</i>	
Responsibility: <i>Manager, Bee-Able CIC</i>	Name: <i>Sharon Senior</i>
Signed:	Date:

1. Purpose

This policy ensures money belonging to service users is managed honestly, transparently, and in their best interests.

2. When We May Handle Money

In specific, agreed circumstances, staff may:

- ☒ Assist with shopping or small cash purchases
- ☒ Support with budgeting during sessions
- ☒ Handle petty cash for planned activities

This must be agreed as part of a person's support plan. It must be handled by the group coordinator or someone who is authorised to undertake this responsibility as assigned by the Manager.

3. Consent and Agreement

We must have:

- Written consent from the service user or legal representative
- Clear agreement on how much can be spent and on what



- A record in the support plan that money-handling is part of the service

4. Record Keeping

Staff must:

- Keep receipts for all purchases
- Log the date, time, item, and amount spent
- Sign all entries and have them countersigned by another staff member or parent/carer where possible
- Return change and receipts promptly

5. Safeguards

We will not:

- ✗ Coerce or influence spending
- ✗ Hold service users' personal funds without agreement
- ✗ Make personal purchases on a user's behalf without clear authorisation

6. Auditing

The Manager will regularly review records to ensure safe practice and prevent financial abuse.

7. Monitoring and Review

We will review our practices regularly and this policy every year to make sure it stays relevant and effective.