



**APRIL COMPLETE CARE SOLUTIONS LTD  
(The “Company”)**

**Accepting of Gifts & Wills and legacies Policy**

**April Complete Care Solutions Ltd**

14 Hendre Road,  
Pencoed, Bridgend  
CF35 5NW  
Telephone 01656 863963

## **1. Gifts & Money**

All employees must make it clear as politely as possible to Individuals/family members that as care workers it is your job to help them and as such no personal gifts or money should exchange hands. However, as the relationship builds between them it is inevitable that on occasions like Christmas and Birthday gifts will be given.

April will make an exception on these occasions and small gifts maybe accepted providing a Manager has been made aware. Gifts would need to be items such as chocolates, biscuits, fruit, toiletries, flowers, plants or tokens.

Under no circumstances must care workers accept money. If it is found that they have, they could be subject to disciplinary procedures. In circumstances where the Individual is insistent about money being given as a gift, and it is seen to be getting upset or agitated in any way, the care worker must inform the Manager who will speak to the Individual/families about other alternatives regarding monetary gifts.

If an Individual repeatedly offers gifts or money to a care worker, the care worker must decline and make it perfectly clear that it is their job and that they get paid for the work that they do. If an Individual persists and the situation becomes difficult the care worker must speak to the Manager who will speak to the Individual on behalf of the Care Worker.

Further included in this policy is:-

- The selling or buying from catalogues
- Party planning
- Buying or selling private services
- Taking responsibility for looking after any valuable on behalf of the service user
- Taking responsibility for looking after another family member
- Taking responsibility for the care of a pet
- Personal use of the service users property, for example, the telephone
- Involvement in gambling syndicates (National Lottery, Football Pools)
- Incurring a liability on behalf of the client.

## **2. Wills and Bequests**

At any time if an Individual/family members ask advice regarding the drawing up a will, care workers should encourage them to get advice elsewhere

i.e. Solicitor or the citizens advice bureau, under no circumstances must a care worker assist with the drawing up of a will, act as a witness or executor to an estate.

If a care worker is informed of intent to make a bequest by an Individual or family member, apart from trying to dissuade the Individual, they should inform the Manager who will in turn inform the family of the Individual.

If an Individual asks a care worker to become an executor of their will, they must decline and explain that it is not the Company's policy for any staff members to become involved in the personal affairs of Individuals. Any such involvement could lead to disciplinary action.

If a care worker is bequeathed an amount of money, or a gift, it must be reported immediately to the Manager.

If care workers are in any doubt as to the Company's policies and procedures on accepting gifts, money or on wills and bequests please do not hesitate to discuss it with the Registered Manager.

This policy and its procedures are in place for the protection of April's Individuals and care workers alike, any breach of this policy will result in disciplinary action.

## **2. What to report**

You must use the form at Appendix A to report any gifts that you have been offered which are of greater value than the limits set out in the policy above. *This form is available in both paper and as an online document upon request.*

The form must be passed to your Manager who will maintain a record. The Manager will be responsible for ensuring the registers are up to date and available for review by auditors etc.

If you are uncertain about what to report, you should contact your Manager for advice.

**Declaration of Gift**  
(to be forwarded to: The Manager as appropriate)

<b>Details of person, gift received by or offered to:</b> Name, Job Title Office Location	
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<b><u>Details of Gift or Hospitality received or offered</u></b>

<b>Estimated value:</b>	
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<b>Date offered:</b>	
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<b>Details of person offering:</b> Name, Job Title Company/Organisation Connection to that person (i.e. existing supplier/service provider)	
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<b>Was the gift received or declined:</b>	
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<b><u>Any other relevant details</u></b> <i>(e.g. reason for acceptance, what has been done with gift etc).</i>

**Declared by:**

Name	Date	Signature

**Authorised by:**

Name	Date	Signature