

Companion Finances

POLICY

Cascadia lifesharing homes are committed to ensuring that companions receiving support are provided with the type and amount of assistance they require to secure, budget, and monitor their personal financial resources safely and effectively.

Individual assistance will be based on personal support needs and tailored to ensure that the companion maintains and acquires as much autonomy as is possible in managing his or her personal finances.

Cascadia homes are accountable for ensuring there are ongoing monitoring and record keeping when assisting and supporting companions who require assistance.

PROCEDURE

A Cascadia home shall only provide personal financial management service:

- With the consent of the companion;
- When the companion's family, guardian or attorney cannot practically provide such service; and
- When the companion is unable or unwilling to manage his or her own financial affairs responsibly.

Such personal financial management services shall be so rendered by Cascadia home coworkers as to enable the companion to maintain or regain as much control over his or her financial affairs as is feasible and appropriate. Such arrangements shall be specified as part of the individual service plan (ISP) process reviewed at least annually in the context of updating individual service agreements.

SECURITY

1. All companion's cash requiring safekeeping shall be kept in a secure place in their home.
2. Any missing cash or documentation must be immediately reported to the home leader and an incident report filed.

BANKING TRANSACTIONS

1. Companion bankbooks shall be updated when the transaction takes place, or at a quarterly minimum.
2. All credits and debits shall be recorded on the personal finance record. This record provides accountability for clients spending money held for them in their homes by the staff.

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3. Direct deposit of client income is the preferred method of deposit. If direct deposit cannot be arranged, the home leader or designate, will ensure deposit of the cheque as soon as possible following receipt of the cheque.

EXPENDITURES

1. Cash withdrawals are to be made for personal spending choices.
2. Significant expenditures in excess of \$100 are the sole responsibility of the home leader in consultation with the companion and, if deemed necessary, the respective (non CS) support family or other individuals.

Responsibility of: Home Leaders
Monitored by: Homes Supervisor