

POLICY NUMBER: NDIS SER DEL 27

INTENT

The intent of this policy is to maximise each Participant's control of their money/finances and support Participants to access and spend their own money as they determine and to ensure that their property is used respectfully and appropriately.

DEFINITION

Money (also known as currency or cash): *anything that people use to buy goods and services or what people receive for selling their own things or services.*

Property: *a thing or things belonging to someone.*

POLICY STATEMENTS

Real Living Options Association Inc. will ensure that all financial transactions and procedures are implemented in a manner that meets the requirements of legislation. To safeguard all Participants and Staff, the procedures outlined in this policy must be strictly followed.

A Participant's money, or other property, is only to be used with the consent of the Participant and/or their Nominee/Representative and for the purposes intended by the Participant.

Staff must not give financial advice or information to Participants and/or their family other than that which is reasonably required under the Participants NDIS plan.

PROCEDURES

Money/Finances

Participants may at times require assistance with their money/finances e.g. paying bills, banking or shopping. When assisting a Participant to manage their money staff must abide by the following steps:

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PARTICIPANT MONEY AND PROPERTY

- Assistance with money/finances may only be provided if it is documented in the Participant's Support Plan and consent has been given by the Participant and/or their Representative/Nominee.
- If a participant requests assistance, and it is not documented in their Support Plan, Staff must contact the Support Manager or Support Facilitator to seek approval.
- Staff are at no time allowed access to a Participant's personal identification number (PIN) or use an automatic teller machine (ATM) on a Participant's behalf.
- In the event staff are required to obtain money on behalf of a Participant this must be done in a bank, where identification can be provided and a receipt obtained.
- Transaction receipts must be obtained and given to the Participant or their Representative/Nominee for any money received or spent.
- The Staff member must be sure to count the money in front of the Participant and/or their Representative/Nominee on receipt and upon return.
- Staff must record all financial transactions carried out for a Participant on a budget spreadsheet and in the Participant's progress report. Records must be documented clearly, accurately and immediately.
- When making purchases on behalf of a Participant, staff should take a photograph of the receipt for the purchase and include it with their session record.
- Staff must never accept money from a Participant or Representative/Nominee as a gift or loan.
- Staff must not give financial advice to Participants or act as a witness for any legal documents.

Property

- Staff must only use a Participants property with their permission and for the purpose it was designed.
- Staff are not to accept property given to them by a Participant without first seeking permission from an appropriate Supervisor.
- Property of any value given to staff by a Participant must be declared and approved by the Support Manager and/or General Manager.

DELEGATIONS

All Staff

- Must abide by this policy.

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RELATED DOCUMENTATION

Intake Support Plan Assessment.

Personal Support Plan and Health & Medical Information.

REFERENCES

NDIS Practice Standards and Quality Indicators.

AMENDMENTS/REVIEWS

Amended 02/03/2023.

Amended 02/07/2026.

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