

SD10

Client Financial & Resource Management

Thrive Care Group Subsidiaries



This policy is part of Thrive Care Group's (Thrive) comprehensive policy suite, designed to guide and govern operations across all subsidiaries. It establishes a unified framework that ensures consistent standards, accountability, and alignment with Thrive core values and strategic objectives. The policy applies to all employees, contractors, and stakeholders within Thrive and its subsidiaries, supporting seamless governance and compliance throughout the organisation.

SD10 Client Financial & Resource Management

Policy Statement

1. Thrive is committed to protecting each client's money, personal belongings and other resources when workers have access to them. Thrive will maintain clear, efficient and accountable processes to manage and safeguard client finances and resources
2. Thrive will ensure team members understand their responsibilities, act with integrity, and comply with relevant legislation, standards and internal procedures when handling client finances and resources.

Procedures

1. Management and Protection of Client Finances & Resources

Team members will:

- a. Document the removal of client money or valuables from the home in the client's notes, including the reason for removal.
- b. Where a team member is required to handle client money, for any reason, they will provide detailed explanations of this in the appointment note. The explanation must record the amount of money handles, the rational as to why the handling was required, and any monies that were returned to the client once the handling process was completed.
- c. Clients are required to retain receipts to evidence of cash handling, and document this where appropriate.
- d. Label client personal belongings with the client's name during outings or supported holidays to support identification and recovery.
- e. Encourage the client to keep money or small valuables in a locked container within the home environment.

2. Process Development

- a. Thrive will review the finance and resource management processes through the Client Advisory Committee to identify risk factors and implement mitigation strategies

3. Consent & Purpose

Team members will:

- a. Remove or use client money or resources only with the client's express consent and for the intended purpose.
- b. Record the reason the resource was taken and the client's decision-making process in the client's file.
- c. Provide information about product or service pricing, payment methods, and potential risks, but do not make purchasing decisions or recommendations on behalf of the client.
- d. Consult the client's parent or guardian regarding financial and resource management decisions where the client has limited decision-making capacity and record their decisions in the client's file.

Related Business Procedures

- a. OM6 – Incident Management Policy
- b. OM8 – Information Management Policy
- c. HR1 – Code of Conduct Policy
- d. HR7 – Disciplinary & Grievance Policy

Responsible Persons

1. The Chief Executive Officer must:
 - a. Manage and monitor compliance with this policy.
 - b. Support team member competence and compliance with this policy.
2. Management must:
 - a. Manage and monitor compliance with this policy.
 - b. Ensure team members receive appropriate training, supervision and debriefing to comply with this policy.
3. All Thrive team members must comply with this policy.

Definitions

1. **Client:** Any individual who receives support or care from Thrive or accesses the services provided by Thrive.
2. **Client Advisory Committee:** A group established by Thrive to provide advice and feedback on service delivery, safety, quality and risk.
3. **Guardian:** A legally appointed person authorized to make decisions on behalf of a client. Guardianship is governed by the Guardianship Act 1987 (NSW).
4. **Resource:** Any item belonging to the client, including money, personal possessions or valuables.
5. **Team Member:** All Thrive employees, volunteers and subcontractors.
6. **Thrive:** Thrive Care Group Pty Ltd ABN 68 637 232 752, together with each of its subsidiaries.

References

1. Aged Care Act 2024 (Cth) and its associated regulations
2. National Disability Insurance Scheme (NDIS) Practice Standards and their associated regulations

Version Control

Version 1 31 August 2025 New policy creation



Thrive Care Group

Visit: thrivecaregroup.com.au

Email: hello@thrivecaregroup.com.au