



Policy and Procedure # 510

Client Purchases with Employee Assistance

Approval: _____ Effective Date: _____

POLICY:

For the protection of the financial interests of EFI clients and to insure separate and accurate accounting of each client, employees shall abide by the following procedures.

PROCEDURE:

1. When making purchases for a client, the client should be present at the time of purchase.
 - a. Clients and assisting staff will sign the receipt. Where a signature is illegible, the employee will "witness" the signature, print the client's name and initial the receipt.
 - b. Each client will have a separate receipt when accompanied by another client who is also making a purchase.

2. If a client prefers not to be present during purchases they may ask for an exception to policy by;
 - a. Completing a written request including their reason for not wanting to be present and submit their request to the Residential Director.
 - b. Obtaining approval for the request by the Residential Director.
 - c. If the client wishes this exception to be permanent it must be included in the client's Individual Financial Plan (IFP).