



Delivering Quality Healthcare

Policy Title	Gifts, Wills and Bequests Policy: 32	Date Implemented or Date of Last Review	10/05/2020
CQC KLOE Reference	Well Led	Date of Next Review	09/05/2021

1. INTRODUCTION

1.1. There may be occasions where clients or relatives of clients wish to offer gifts to temporary workers. This policy sets out KOPE-MEDICS's position about action to be taken by temporary workers who are offered gifts, or bequests in wills.

2. RESPONSIBILITIES

2.1. This policy forms part of the contract of employment of each employee. The policy is intended to protect temporary workers from being placed in compromising situations and is intended to protect clients from the potential of financial abuse by others.

2.2. Any breach of this policy by temporary workers may result in disciplinary action.

2.3. If any temporary worker is unclear about any part of this policy they should discuss it with the Manager.

2.4. This policy applies equally to all temporary workers and to members of their immediate family.

3. GIFTS

3.1. If temporary workers are ever offered gifts by clients or their relatives for the care and services provided, at all times temporary workers should very clearly and politely inform clients that their job is to care for clients and they are not able to receive gifts for services given.

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- 3.2. There are, however, some occasions (such as Christmas, birthdays etc.) where a client may feel that a gift is appropriate as part of the caring relationship that exists between Domiciliary Carer and client.
- 3.3. On these occasions, the temporary worker should inform management who should make a reasoned judgement at the time.
- 3.4. Should a client or their relatives repeatedly offer gifts, these must be politely and firmly declined, and the Manager informed. The Manager of KOPE-MEDICS is available to offer advice and support in these cases.

4. WILLS AND BEQUESTS

- 4.1. If a client seeks advice about making a will, they should be encouraged to do so through a solicitor or through the Citizens' Advice Bureau.
- 4.2. The Manager may make arrangements for a solicitor to visit the Agency at the request of a client but should never recommend any solicitor in preference to another.
- 4.3. Under no circumstances should a temporary worker be involved in the drawing up of a will, or act as a witness or as executor of an estate.
- 4.4. Under no circumstances should a temporary worker seek a legacy for the Agency from any client who is about to make, or change, their will.
- 4.5. If a client asks a temporary worker about making a bequest to the agency, the client should be referred to the Manager who will deal with the matter.
- 4.6. Where it becomes known that a client intends to make a personal bequest to temporary workers, or appoint them as executors, then the Manager should be informed.
- 4.7. Temporary workers should explain that the agency's policy will not allow for temporary workers to become involved in client's affairs, and such involvement may lead to disciplinary action. Temporary workers have the right to be released from any involvement as executor if they do not wish to be involved.

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- 4.8. In the event of a temporary worker being left a sum of money or a specific gift item from the estate of a client, they should report this to the Manager as soon as possible.
- 4.9. No temporary worker should become involved in making funeral arrangements or disposing of the estate before the necessary legal advice has been sought. This policy does not apply to donations.

5. DONATIONS

- 5.1. This policy does not apply to donations.
- 5.2. Any person who wishes to make a donation of any kind to the Agency should be encouraged to contact the Manager who should:
 - 5.2.1. Establish the nature of the donation.
 - 5.2.2. Make arrangements for the donation to be handed over.
 - 5.2.3. Issue a receipt and a formal letter of gratitude and acknowledgement.

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