



## **FINANCIAL PROCEDURE**

### **Advice to volunteers taking payment for goods delivered to clients**

- The preferred method for clients to receive goods will be for direct delivery from the supermarket or by click and collect. This way, payment can be made directly to the supplier. There will, however, be many situations where this just isn't possible
- Please wear gloves, either your own or disposable rubber gloves for handling goods, credit cards or money. Please follow the safety guidelines detailed in the physical safety advice sheet
- Payment by BACS is the preferred method. Payment by credit card is possible, using the FDRGT mobile credit card machine, available from George Devine, tel: c. 292824
- Please be advised that it is not lawful to take the client's pin number or for someone to share their pin number, so, in other words, you must not take a client's card shopping, either for making the payment or making a cash withdrawal
- Some volunteers are happy to run a Tab system for their clients. This is entirely at your discretion
- Where appropriate, particularly with vulnerable and elderly clients, and only with the client's permission, it may be advisable to inform the client's next of kin of any financial transactions, to avoid relative(s) worrying about their relation being a victim of fraud, should they be looking at the client's bank statements etc. in the future
- Where cash is used, the client should place it on a plate or in a plastic container and give it to the volunteer this way, to avoid hand to hand contact
- It is advisable that the plate/credit card is placed on a window ledge or ground/doormat, so that the client and volunteer can maintain physical distancing of 2 metres
- Payment for goods, where payment has not already been made directly by the client to the supplier, should be made by whichever method, on your delivery of goods to the client and not before
- The volunteer should take a photo of the receipt on their mobile phone and forward it to their Street lead co-ordinator, who will maintain a copy of the transaction, along with the registered task. Where this is not possible, a hand written receipt must be obtained on a piece of paper, using the plate/ plastic container method detailed above. This should then be scanned and emailed or delivered in an envelope to the Street lead coordinator.