

Appendix 8 Halton Borough Council Service Closure Policy

Client Finance Checklist

General Issues	Action: Social Worker
Is the manager, owner or any other staff member the benefit appointee for any of the residents?	
Is the home holding any cash which belongs to any residents?	
Is the home holding any benefit or bank books which belong to any of the residents?	
Is the home holding any valuables on behalf of any resident?	
Does anyone connected with the home have access to any residents' savings accounts?	
Does anyone connected with the home manage the financial affairs for any of the residents?	
Residence Issues	Action: Social Worker
What date did the resident take enter the accommodations?	
Was the resident placed by Cheshire or Halton Social Services?	
Did the resident make his/her own arrangements?	
Is another local authority involved?	
Does the resident have protected status?	
Does the resident manage his or her own financial affairs?	
Are all the residents present in the home?	
Benefit and Finance Issues	Action: Finance Staff
Is the resident in receipt of benefits?	
Who holds the resident's benefit books?	
Does the resident have an appointee for benefit purposes?	
Does anyone have power of attorney on the resident's behalf?	
Does anyone else manage the resident's financial affairs?	

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Financial Assessment Issues	Action: Finance Staff
Has the resident had a Cheshire or Halton financial assessment?	
Does the resident pay another authority for the accommodation?	
Does the resident meet the cost of the accommodation from his or her own finances?	
Does a 'third party' make any payments towards the cost of the accommodation?	
Does the resident have any standing orders or direct debits in force to pay for the accommodation?	
Does the resident hold any outstanding invoices for services provided by the home?	
Does Halton hold any outstanding invoices for services provided by the home?	