Companions Errands Policy

PRN-164: Companions Errands Policy
Company Name: AI Auto-Tech Ltd
Trading/Business Name: CAREHOPES
Company Registration Number: 15556946
SIC Code: 88100 – Social Work Activities Without Accommodation for the Elderly and Disabled
Email: admin@carehopes.com
Version Number: V01 20260815
Date of Review: (August 2026)

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1. Policy Purpose

This policy governs how companions carry out **non-accompanied errands**, including shopping and other authorised tasks performed **without the client present**. It ensures:

- Financial safety
- Fraud prevention
- Transportation safety
- Clear expenditure management
- Protection of companions and clients
- Compliance with TC's Policy of Engagement

2. Policy Statement

CAREHOPES permits companions to carry out **non-accompanied errands** only in **pre-approved situations**, including:

- When the client **lacks capacity** to shop in person
- When it is **not feasible** for the client to accompany the companion
- When the client **chooses** to pay TC to carry out errand services
- When the client's wellbeing or safety requires non-accompanied errands

All errands must comply with this policy.

3. Financial & Expenditure Management

3.1 Companions must NEVER:

- Hold client cash

- Hold client debit or credit cards
- Use client bank accounts
- Use client digital wallets
- Receive money directly from clients

3.2 Client Payment Structure

Clients choosing non-accompanied errands must:

- Determine their **weekly or monthly spending limit**, OR
- For pay-as-you-go errands, determine the **estimated cost of goods**
- Add this amount to their **contract sum payable to TC**

TC will then:

- **Mobilise funds** to the companion before the errand, OR
- **Reimburse the companion** after the errand (with pre-approval)

3.3 Companion Reimbursement

If mobilisation was not possible:

- Companion **must obtain supervisor approval** before using personal money
- Companion must submit receipts immediately after shopping
- TC will reimburse the exact amount spent
- No reimbursement is made without receipts

4. Transportation Rules

4.1 Approved Transport

Companions performing errands must:

- Use **taxi services only**
- Shop in areas with **multiple shopping centres** where possible
- Obtain **pre-approval** if multiple taxi trips are required

4.2 Prohibited Transport

Companions must NOT:

- Travel in the client's vehicle
- Except where the vehicle is **fully insured** to cover passengers at all times

- This must be **confirmed and communicated** to companions
- Otherwise, the **Transportation Policy applies** (no travel in client vehicles)

5. Safeguarding & Risk Controls

- All errands must be authorised by TC management or supervisor
- Companions must report any concerns immediately
- Companions must not perform errands outside approved areas
- Companions must not handle controlled items or restricted goods
- All receipts must be submitted for audit
- TC may conduct random expenditure audits

6. Documentation Requirements

Companions must complete:

- Errand Request Form
- Pre-approval confirmation
- Receipt submission
- Expenditure reconciliation
- Supervisor sign-off

7. Policy Enforcement

Non-compliance may result in:

- Disciplinary action
- Removal from errand duties
- Contract termination (for clients or companions)

8. Review

This policy will be reviewed:

- Annually
- After any incident
- After legislative changes
- At the request of TC management