Check Up on Client Policy

Policy Title: PRN-014: Check Up on Client 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
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1. Introduction

The Check Up on Client Service is a structured welfare assessment designed to ensure the safety, wellbeing, and environmental stability of clients who require periodic monitoring. This service is **task-based, not time-based**, and focuses on delivering essential checks that support client independence, health, and safeguarding.

This policy outlines the standards, procedures, documentation requirements, and escalation protocols for companions delivering check-up services.

2. Purpose of the Policy

The purpose of this policy is to:

- define the structure of the check-up service
- ensure consistent welfare monitoring
- establish environmental safety assessment standards
- support medication adherence review
- outline GP appointment coordination procedures
- ensure safeguarding compliance
- standardise documentation and reporting
- protect clients from neglect, risk, or deterioration

3. Scope

This policy applies to:

- companions
- volunteers

- staff assigned to check-up duties
- supervisors overseeing welfare monitoring

4. Definitions

4.1. Check-Up Service

A structured welfare assessment consisting of predefined tasks designed to evaluate client wellbeing and environmental safety.

4.2. Task-Based Service

A service where completion is determined by fulfilling required tasks, not by the duration of time spent.

4.3. Welfare Checklist

A structured list of wellbeing indicators assessed during each visit.

4.4. Environmental Safety Assessment

A review of the client's living conditions to identify hazards, neglect, or safeguarding concerns.

5. Roles & Responsibilities

5.1. Companion Responsibilities

Companions must:

- complete all required tasks
- conduct welfare and environmental assessments
- document findings accurately
- escalate concerns immediately
- maintain professional boundaries
- ensure client dignity and respect
- avoid performing personal care or medical tasks

5.2. Supervisor Responsibilities

Supervisors must:

- review submitted reports
- respond to escalations
- ensure companions are trained

- ensure safeguarding protocols are followed

6. Arrival Confirmation

Upon arrival, companions must:

- confirm arrival through TC's official system
- notify the client's family or designated contact (if required)
- introduce themselves professionally
- begin the welfare assessment immediately

Failure to confirm arrival is a procedural breach.

7. Welfare Checklist

Companions must assess and document:

7.1. Mood & Emotional State

- signs of distress
- anxiety
- confusion
- withdrawal
- agitation

7.2. Hydration & Nutrition

- access to clean drinking water
- recent food intake
- signs of dehydration
- signs of malnutrition

7.3. Mobility & Physical Condition

- ability to move safely
- recent falls
- pain or discomfort
- changes in gait or balance

7.4. Hygiene

- personal hygiene indicators

- clothing condition
- signs of neglect

7.5. Medication Adherence

- check medication schedules
- confirm adherence
- identify missed doses
- report concerns
- **never administer medication**

8. Medication Adherence Review

Companions must:

- visually check medication blister packs or organisers
- confirm whether doses have been taken
- report missed doses immediately
- remind clients of medication schedules
- avoid touching or handling medication
- avoid making medical decisions

Medication errors must be escalated to TC immediately.

9. GP Appointment Coordination

Companions may:

- remind clients of upcoming GP appointments
- assist with digital booking
- help organise transportation
- ensure appointment details are documented

Companions must **not**:

- make medical decisions
- cancel appointments without client consent
- provide medical advice

10. Environmental Safety Assessment

Companions must assess:

10.1. Hygiene & Cleanliness

- general cleanliness
- kitchen hygiene
- bathroom hygiene
- presence of pests

10.2. Clutter & Trip Hazards

- loose items on the floor
- obstructed walkways
- unstable furniture
- unsafe rugs

10.3. Water Supply

- access to clean water
- functioning taps
- signs of leaks

10.4. Heating & Ventilation

- adequate heating
- safe heating sources
- ventilation issues

10.5. Signs of Neglect

- spoiled food
- unpaid bills
- lack of basic supplies
- isolation indicators

10.6. Safeguarding Risks

- signs of abuse
- unexplained injuries
- unsafe visitors

- financial exploitation indicators

Any safeguarding risk must be escalated immediately.

11. Digital Family Video Call Setup

Companions may:

- set up video calls
- use approved platforms (Google Meet, Teams, Zoom)
- ensure privacy
- ensure data protection
- assist clients in connecting with family

Companions must **not**:

- record calls
- store call data
- use unapproved platforms

12. Structured Reporting Requirements

Companions must submit:

- welfare report
- environmental safety report
- medication adherence notes
- GP coordination notes
- escalation alerts (if applicable)

Reports must be:

- factual
- objective
- submitted immediately after the visit
- free from personal opinion

13. Escalation Procedures

Companions must escalate:

13.1. Safeguarding Concerns

- abuse
- neglect
- exploitation
- unsafe visitors
- environmental hazards

13.2. Medical Emergencies

- severe pain
- collapse
- breathing difficulties
- confusion or delirium

13.3. Environmental Risks

- fire hazards
- water leaks
- heating failure
- infestations

Escalations must be made to:

- TC Safeguarding Team
- emergency services (if required)
- client's designated contact

14. Professional Boundaries

Companions must not:

- perform personal care
- administer medication
- handle client finances
- share personal contact details
- engage in romantic or intimate behaviour
- accept expensive gifts
- share personal problems

Boundary breaches constitute **gross misconduct**.

15. Legal & Regulatory Compliance

This policy aligns with:

- UK safeguarding legislation
- Data Protection Act 2018
- UK GDPR
- TC confidentiality policies
- TC digital security policies

Companions must comply with all legal and organisational requirements.

16. Disciplinary Consequences

Non-compliance may result in:

- retraining
- formal warnings
- suspension
- removal from check-up assignments
- termination
- safeguarding escalation
- legal referral

17. Amendments

TC may update this policy to reflect:

- legal changes
- safeguarding updates
- operational improvements
- governance decisions

Updates will be communicated through official TC channels.

18. Contact Information

For check-up service enquiries, contact:

CAREHOPES (TC) Email: admin@carehopes.com Governance & Safeguarding Team