

# Guidelines for Home Visits

## Introduction

Many voluntary organisations, particularly those concerned with health issues, carry out home visits to their members or beneficiaries. These visits may be carried out by staff or volunteers. There are two main factors to consider here. One is the personal health and safety of the visitor, the other is good practice which should apply to all organisations carrying out

home visits. This leaflet has been compiled from good practice guides produced by several major organisations. We are assuming the visitors are volunteers reporting to a co-ordinator and the service users are referred to as clients. You may wish to modify these terms or add particular points of detail to suit your own organisation.

## Lone working

A volunteer may often be working alone when visiting, so a few common sense health and safety precautions need to be observed:

- Always tell someone where you are going, who you are meeting and when you expect to return. If going straight home, arrange to check in with your co-ordinator when you finish working.
- Record the name and contact details of people you are meeting. Ensure you have been given all the information about them and their home that you need.
- Prepare yourself for difficult meetings by finding out everything you need to know before arriving



and planning in your mind how you are going to deal with it

- Do not meet aggression with aggression.
  - Do not enter a building, particularly someone else's home, if you don't feel comfortable or safe. Ensure you know where the nearest exit is and if anything at all worries you during the visit, leave immediately. Trust your instincts.
  - If driving, ensure you belong to a national breakdown service, and that you know where you are going and how to get there
  - Carry a mobile phone in case you need to summon assistance and make sure it's always charged up for times when you get called out unexpectedly.

## Good practice

- A new volunteer should always be accompanied on their first few visits, to ensure they are familiar with the guidelines and happy about carrying them out. They should be told about all the little things they need to know, such as any "problem" clients or the fact that Mr X's sweet little poodle will bite if you try and stroke it!
- Always make an appointment to visit someone. Don't just "drop in" unless you have been specifically asked to do so. Surprising people can cause distress. Remember also that clients have a perfect right to refuse a visit, even if it has been pre-arranged. They might just not feel like talking to you that day!
- Carry some form of identification which should be shown on every visit. If it is lost, report this immediately to your co-ordinator.
- If someone else is visiting when you call, offer to call again at a more convenient time. If invited to stay, do not discuss the client's affairs or health in front of the other visitor.
- Respect the client's confidentiality. Do not discuss their personal affairs with others. If the wrong person overhears you discussing how poor Mrs Y is on her own all day and finds it difficult to get out of her chair, you could be inviting a burglar or con-artist to call.

# Guidelines for Home Visits

- Do not undertake moving or handling tasks while visiting. If you have not been properly trained, you may risk injuring yourself or the client, giving rise to a claim for negligence.
- For the same reason, do not administer medication or carry out personal care tasks when visiting.
- Cash gifts or offers of a loan should be politely refused. If you are offered large sums of money, discuss the matter with your co-ordinator immediately, to avoid the possibility of misunderstandings. If you are faced with embarrassing or persistent offers of cash, quote the organisation's official policy as the reason for refusal. Sometimes, however, a small thank-you gift of low value, such as flowers or confectionery may be accepted, as to turn this down might give offence.
- Visitors should not pay bills, collect pensions or carry out other monetary transactions on behalf of the client. If asked to buy some small items such as groceries, always get a receipt and keep your own record of the items bought and any cash returned to the client. Sometimes elderly people can forget that money was returned to them and this is how misunderstandings arise.
- You should not become involved in the financial or legal affairs of clients. Do not provide assistance or advice in drafting a will or any other legal document. Do not sign any legal paperwork as a witness or assist with filling in benefit forms, tax returns or loan agreements. Do not raise the client's expectations or hopes for possible receipt of benefits or any other financial support.

Remember the golden rule: you should not give advice on any subject you are not qualified in - if the client requires help with legal or financial matters, report this to your co-ordinator, so that appropriate professional assistance can be obtained. And never sign anything for someone else – you don't know what you're committing yourself to!

If you should accidentally damage any of the client's property during your visit, report this immediately to your co-ordinator. If however you lose or damage any of your own property while visiting, this is unlikely to be covered by the insurance of the organisation for which you are volunteering. Your own household contents policy may cover the loss of personal effects. As a general rule, carry as few personal belongings with you as possible when visiting.

The organisation should ensure that all volunteers are familiar with the above guidelines through training and induction. Regular reviews of the policy should take place to ensure it is being followed and improvements incorporated as necessary.

***The information for this factsheet was originally written by Derby CVS, from material from The Suzy Lamplugh Trust, Millennium Volunteers (DfEE), Derby City Council Social Services, Derbyshire Carers Association and Derby Meniere's Support Group, as is reproduced here with their kind permission.***

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