



**POLICY NUMBER: 19**

**POLICY TITLE:**

**A24GROUP POLICY ON LOCUM DOCTOR'S INVOLVEMENT IN WILLS AND ESTATES OF CLIENTS**

**WHO MUST ABIDE BY THIS POLICY?**

**All A24Group Locum Doctor's, regardless of whether they are permanent or temporary.**

**THE PURPOSE OF THIS POLICY:**

- **To provide locum doctor's with the rules on accepting bequests, gifts and gratuities from clients.**
- **To provide a mechanism which protects the client from financial loss or harm.**
- **To ensure that all locum doctors act in a manner that promotes openness, honesty and integrity.**

**POLICY CONTENT:**

**WHAT YOU MUST NOT DO**

<b>Company Policy</b>	<ul style="list-style-type: none"> <li>- It is both company policy and part of the Contracting Authority Policies that staff members must never accept any involvement as a party to the making of the clients will or in bequeathing any part of the client's estate.</li> <li>- Locum Doctors must not agree to draft the client's will or any part thereof.</li> <li>- Locum Doctors must not agree to act as a witness in the will or as an executor of the client's estate.</li> </ul> <p><i>Please note: Involvement in a clients will as described in this policy is seen as serious misconduct and locum doctors will be disciplined accordingly.</i></p>
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**WHAT YOU MUST DO**

<b>Honesty</b>	<ul style="list-style-type: none"> <li>- All locum doctors are required to act openly, honestly, responsibly and without criminal intent in respect of a client's will or estate.</li> </ul>
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**WHAT YOU MUST DO**

<p><b>Assistance allowed.</b></p>          <p><b>Appointment as executor.</b></p>	<ul style="list-style-type: none"><li>- Locum Doctor's are only allowed to assist the client:<ul style="list-style-type: none"><li>- where the client has no family, advocate or friends that will help to assist the client and where</li><li>- the assistance that the locum doctor is giving is to merely contact an advocate, solicitor or Citizens Bureau on the client's behalf. All locum doctors must report any knowledge of the client appointing them as an executor of the client's estate immediately by making a record in the client's file advising their immediate manager.</li><li>- There will however be situations where the locum doctor has had no prior knowledge. If this should occur, then the locum doctor should advise their immediate manager and make a choice as to whether the locum doctor will accept executorship or not.</li></ul></li></ul>
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**END OF POLICY**