

Document name:	Service User Property Policy (including money) (1025)
Document type:	Policy
What does this policy replace?	Patients' Property Policy
Staff group to whom it applies:	All staff who deal with service user property
Distribution:	The whole of the Trust
How to access:	Intranet
Issue date:	Version 5 October 2023
Next review:	October 2026
Approved by:	Executive Management Team 19 October 2023
Developed by:	Head of Financial Accounting
Director leads:	Director of Finance / Chief Operating Officer
Contact for advice:	Head of Financial Accounting / Matrons

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1. Introduction

Admission to hospital can be a stressful time for service users and their families and they should expect a safe and secure environment and the assurance that their belongings are secure during their stay.

Keeping belongings safe from loss or damage can be a challenge for NHS organisations, due to the movement of service users during their stay, their reluctance to hand over property for safekeeping and the number of service users living in our property.

This policy outlines the responsibilities of the Trust and should be read in conjunction with the two accompanying procedures, operational and finance as appropriate.

2. Purpose and scope of the policy

The aim of the policy is to have clear guidance on the Trust's approach and management of service user property and monies to ensure that property is recorded, stored and returned in accordance with standing financial instructions and best practice.

3. Definitions

3.1. The following key terms are used throughout this document:-

Property: for the purposes of the policy, property includes money and any other personal property.

Valuables: for the purposes of this policy, valuables include any item of value (including, but not limited to, monetary value) For example, cash, credit/debit cards, portable electronic devices and jewellery.

Deposited property: this is the property which SWYPFT takes into its care for safekeeping, either following an explicit agreement with the service user or because they are incapacitated or otherwise unable to look after it.

Undeposited property: this is property which service users retain with them on SWYPFT premises. This includes any items placed by service users in the personal safe in their room.

Controlled items: this is property that service users may bring to the ward

but are only allowed controlled access to. This can vary per service/ward and each ward will have an up to date list.

4. Principles

Each ward needs to have an operational procedure for managing service user property (both deposited and un-deposited) and it is the responsibility of the ward manager to ensure this is in place and communicated to all staff. This procedure will follow the principles stated in Service User Property – operational procedure

Each ward should display a disclaimer notice as per this policy to limit the Trust's liability.

Service users and their relatives/ carers should be given clear and comprehensive information on their rights and responsibilities with respect to property taken onto SWYPFT premises. The information given should reflect the circumstances of their admission, whether it is an emergency or planned admission.

The staff member responsible for the admission needs to highlight the ward disclaimer poster [Appendix D] and inform the service user or their relative/carer that the Trust and its staff cannot accept any liability for loss or damage to personal property unless it is formally deposited with the Trust and a receipt obtained.

The service user and their relative/carer needs to be informed that large amounts of money (>£50) should not be given direct to the service user whilst in our care without discussing it with Ward staff. In these instances the family should be encouraged to deposit the monies with the Patients Bank.

Where service users decide to keep property with them, they should be informed again that the Trust will not accept liability for loss of or damage to it, and asked to sign a service user property disclaimer form (undeposited property book) to acknowledge that the property is held at their own risk.

The Mental Capacity Act 2005 (MCA) applies to decisions about service users' property. When a service user needs to make a decision, staff should always start from the assumption that the service user has capacity to make it, and should make every effort to help them make the decision themselves.

For any financial matters staff must refer to the Service User Property – Finance procedure.

5. Duties

All members of staff are required to uphold security arrangements. This includes complying with all policies and procedures relating to the protection of service users' property. All members of staff are also required to comply with financial procedures and ensure propriety in all their activities.

There are more specific duties which apply to certain staff roles or categories:

The **Chief Executive** has overall responsibility for provision of a safe and secure environment for service users and their property whilst on SWYPFT premises. This includes having suitable arrangements in place to inform service users or their guardians before or at admission that SWYPFT will not accept responsibility or liability for service user property brought onto Trust premises unless it is handed in for safe custody. The arrangements should also include the response in the event of loss or damage to service users' property.

The **Director of Finance** is responsible for providing the high level service user policy and the finance procedure.

The **Chief Operating Officer** has responsibility for the operational procedure relating to service user property to ensure that this policy and procedures have been implemented and is adhered to within their directorate.

Director of Operations each of these has responsibility to ensure that this policy has been implemented and is adhered to within their services.

Ward Managers have responsibility for informing staff, on appointment, of their responsibilities and duties for the administration of service users' property. The ward managers are also responsible for ensuring that this policy, or local policy where applicable, and the relevant procedures are implemented in the department, ward or unit. This includes monitoring and auditing compliance.

Healthcare professionals are responsible for ensuring that all service users' property is appropriately documented in a timely way. They are also responsible for making service users' and their representatives aware of the Trust's policies and procedures with regard to service users' property.

The **Local Security Management Specialist (LSMS)** takes forward security management work locally in accordance with national standards. They work with key colleagues to promote the secure management of service users' property and effectively respond to incidents and security breaches relating to service users' property.

The role of the **Local Counter Fraud Specialist (LCFS)** includes tackling fraud in relation to service user's monies. This includes pre-emptive checks of systems and investigation of suspected frauds.

Ward Clerks should ensure that the correct information and material is available. This will include disclaimer notices and service user forms. Ward clerks will also liaise with general office staff / Patient bank staff about property held by the Trust in safe custody.

General Office Staff / Patient Bank Staff ensure safe custody of

service users' property following the Trust's procedure. They will also manage day to day transactions of service users' monies, ensuring accurate record keeping.

The **Patient Affairs Officer** provides advice to all Trust staff on service users' monies. They have responsibility to maintain the Trojan Service User Monies system and ensure that all transactions are accurately recorded on a timely basis.

The **Customer Services team** ensures that people get the help and support they need to voice their comments, compliments, concerns and complaints.

Security staff assists with crime prevention and security training for all staff. They take the initial lead in investigation and detection of crime and security incidents within the Trust.

6. Equality Impact Assessment

This policy has no differential impact on equality, as identified by the Equality Impact Assessment Team as included in the "Policy for the development, approval and dissemination of policy and procedural document". Please see Appendix C.

7. Dissemination and implementation arrangements

Once approved, the integrated governance manager will be responsible for ensuring the updated version is added to the document store on the intranet and is included in the staff brief.

The integrated governance manager is responsible for ensuring the document being replaced is removed from the document store and that an electronic copy, clearly marked with version details, is retained as a corporate record.

If local teams download and keep a paper version of procedural documents, the manager must identify someone within the team who is responsible for updating the paper version when a policy change is communicated via the staff brief.

Implementation of the policy will be cascaded from the directors, assistant directors through their service delivery groups and by the heads of service through their defined leadership and management structures.

Advice can be sought from the Head of Financial Accounting (for finance queries) and Matrons (for operational matters).

8. Process for monitoring compliance and effectiveness

Service Users' monies are audited on a regular basis by the Trust's internal auditors. They review the Trust's policy in comparison with published national guidance; and the consistency and effectiveness of the procedures as implemented across the Trust; and report on their findings. The Trust endeavours to implement agreed recommendations on a timely basis.

The appropriate display of disclaimers, adherence to relevant local procedures and general compliance with this policy will be incorporated into existing clinical review and quality assurance practices.

Where deficiencies are identified, the Trust will investigate the reasons for the deficiencies and develop appropriate recommendations with action plans for implementation of any changes.

9. Review and revision arrangements

The policy will be reviewed by the agreed review date, in line with the Trust "Policy for the development, approval and dissemination of policy and procedural documents", or earlier if required. Responsibility for initiating a review and taking the new policy to the Executive Management Team for Approval lies with the lead director.

The Integrated Governance Manager is responsible for placing the new version of the policy in the electronic document store, for ensuring the document being replaced is removed from the document store and that an electronic and paper copy, clearly marked with version details, are retained as a corporate record.

10. References and associated documents

- Service Users property Financial Procedures
- Service Users property Operational Procedures

11. Appendices

Appendix A: Equality Impact Assessment (EIA)

Appendix B: Checklist for the review and approval of policy document

Appendix C: Version Control sheet

Appendix D: Ward Disclaimer Notice

Equality Impact Assessment template to be completed for all policies, procedures and strategies

Date of EIA: August 2023

Review Date: September 2026

Completed By: Head of Financial Accounting

	QUESTIONS	ANSWERS AND ACTIONS															
1	What is being assessed? Prompt: what is the function of this document (new or revised)	Service User property policy (review of existing policy)															
2	Description of the document Prompt: What is the aim of this document	The aim of the policy is to provide guidance on the management of Service User's Property whilst in residential care.															
3	Lead contact person for the Equality Impact Assessment	Head of Financial Accounting															
4	Who else is involved in undertaking this Equality Impact Assessment	Deputy Director of Finance															
5	Sources of information used to identify barriers etc Prompts: service delivery equality data – refer to equality dashboards (BI Reporting - Home (sharepoint.com)) satisfaction surveys, complaints, local demographics, national or local research & statistics, anecdotal. Contact InvolvingPeople@swyt.nhs.uk for insight What does your research tell you about the impact your proposal will have on the following equality groups?	Equalities data – BI equalities reporting National and local data sets															
5a	Disability Groups: Prompt: Learning Disabilities or Difficulties, Physical, Visual, Hearing disabilities and people with long term conditions such Diabetes, Cancer, Stroke, Heart Disease etc. Accessible information standard	Disability groups <table border="1"> <thead> <tr> <th></th><th>Not Disabled</th><th>Disabled</th></tr> </thead> <tbody> <tr> <td>England % av.</td><td>47.2</td><td>13.2</td></tr> <tr> <td>Kirklees</td><td></td><td></td></tr> <tr> <td>% average</td><td>82.6</td><td>17.4</td></tr> <tr> <td>Barnsley</td><td></td><td></td></tr> </tbody> </table>		Not Disabled	Disabled	England % av.	47.2	13.2	Kirklees			% average	82.6	17.4	Barnsley		
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Kirklees																	
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Barnsley																	

% average	78	22
Calderdale		
% average	81.7	18.3
Wakefield		
% average	79.9	20.1

Taken from Census 2021 for each area

The policy recognises that some families and carers may have different communication needs. In these cases plans for communication should fully consider these needs. Knowing how to enable or enhance communications family members is essential to facilitating a process, focusing on the needs of individuals and their families and being personally thoughtful and respectful. All communication and information should be provided in line with [Accessible Information standards](#).

Animations showing what happens when you are detained includes property allowed onto wards.

[Forensics involvement \(sharepoint.com\)](#)

Claims data for the last 3 years

	22-23	21-22	20-21
Total	33	24	18
LD Wards	3	1	1
%	9%	4%	6%

Finance claims data 2023

The Trust does not record claims by disability, the only assessment we currently have is the type of ward that the service user is on. Based on the above around 6% of claims are from service users on a learning disability ward.

QUESTIONS

ANSWERS AND ACTIONS

5b

Gender:

Prompt: Female & Male issues should be considered

There is no impact from this policy on gender.

Gender	Male	Female
England % av.	49.2	50.8
Kirklees	49.4	50.6
Barnsley	49.1	50.9
Calderdale	48.9	51.1
Wakefield	49	51

. Taken from Census 2021 data

Claims data for the last 3 years

	22-23	21-22	20-21
Total	33	24	18
Male	15	12	11
%	45%	50%	61%
Female	18	12	3
%	55%	50%	17%
Unknown	0	0	4

		<table><tr><td>%</td><td>0%</td><td>0%</td><td>22%</td></tr></table> <p>Finance claims data 2023</p> <p>Based on the data the % of claims is quite even between male and female claimants.</p>	%	0%	0%	22%																																																																																	
%	0%	0%	22%																																																																																				
5c	<p>Age:</p> <p>Prompt: Older people & Young People issues should be considered</p>	<table><tr><td></td><td></td><td>Under 18</td><td>18-39</td><td>40-59</td><td>60-79</td></tr><tr><td rowspan="2">England</td><td>Number</td><td>11774609</td><td>16161002</td><td>14897132</td><td>10858911</td></tr><tr><td>Percentage</td><td>20.8%</td><td>28.6%</td><td>26.4%</td><td>19.2%</td></tr><tr><td rowspan="2">Barnsley</td><td>Number</td><td>50068</td><td>65448</td><td>65850</td><td>51606</td></tr><tr><td>Percentage</td><td>20.5%</td><td>26.8%</td><td>26.9%</td><td>21.1%</td></tr><tr><td rowspan="2">Calderdale</td><td>Number</td><td>45122</td><td>51990</td><td>57280</td><td>42548</td></tr><tr><td>Percentage</td><td>21.8%</td><td>25.2%</td><td>27.7%</td><td>20.6%</td></tr><tr><td rowspan="2">Kirklees</td><td>Number</td><td>98029</td><td>119116</td><td>114735</td><td>81845</td></tr><tr><td>Percentage</td><td>22.6%</td><td>27.5%</td><td>26.5%</td><td>18.9%</td></tr><tr><td rowspan="2">Wakefield</td><td>Number</td><td>73625</td><td>96756</td><td>94822</td><td>71717</td></tr><tr><td>Percentage</td><td>20.8%</td><td>27.4%</td><td>26.8%</td><td>20.3%</td></tr></table> <p>Taken from Census 2021</p> <p>Claims data for the last 3 years</p> <table><tr><td></td><td>22-23</td><td>21-22</td><td>20-21</td></tr><tr><td>Total</td><td>33</td><td>24</td><td>18</td></tr><tr><td>Adult</td><td>33</td><td>23</td><td>17</td></tr><tr><td>%</td><td>100%</td><td>96%</td><td>95%</td></tr><tr><td>Older Peoples</td><td>0</td><td>1</td><td>1</td></tr><tr><td>%</td><td>0%</td><td>4%</td><td>5%</td></tr></table> <p>Finance claims data 2023</p> <p>The age of the claimant is not recorded however the ward is and the data from the last 3 years shows minimal claims from older peoples wards. Most claims are from inpatient areas rather than community teams which have service users under 18. The majority are from adult wards.</p> <p>Ward staff are available to help individuals complete the claim form and any property forms on admission and should make any necessary adjustments and adaptations to support individual needs.</p>			Under 18	18-39	40-59	60-79	England	Number	11774609	16161002	14897132	10858911	Percentage	20.8%	28.6%	26.4%	19.2%	Barnsley	Number	50068	65448	65850	51606	Percentage	20.5%	26.8%	26.9%	21.1%	Calderdale	Number	45122	51990	57280	42548	Percentage	21.8%	25.2%	27.7%	20.6%	Kirklees	Number	98029	119116	114735	81845	Percentage	22.6%	27.5%	26.5%	18.9%	Wakefield	Number	73625	96756	94822	71717	Percentage	20.8%	27.4%	26.8%	20.3%		22-23	21-22	20-21	Total	33	24	18	Adult	33	23	17	%	100%	96%	95%	Older Peoples	0	1	1	%	0%	4%	5%
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5d	<p>Sexual Orientation:</p> <p>Prompt: Heterosexual, Bisexual, Gay, Lesbian groups are included in this Category</p>	<p>The Trust will improve on the recording of sexual orientation in line with the 'Sexual Orientation Monitoring standard' so the Trust can ensure that services and workforce adequately represent the population they serve. The 2020/21 census may contain further baseline information which can be used to support the Trust understanding further as this is an area that remains mainly unknown.</p>																																																																																					

There is no impact on this policy on sexual orientation.

	Straight/ Heterosexual	Gay/ Lesbian	Bisexual	Pansexual
Barnsley	182948	2990	1817	290
%	91.6%	1.5%	0.9%	0.1%
Calderdale	149815	2811	1968	395
%	89.9%	1.7%	1.2%	0.2%
Kirklees	311501	4340	3697	504
%	90.0%	1.3%	1.1%	0.2%
Wakefield	261615	4321	2968	504
%	91%	1.5%	1.0%	0.2%

	Asexual	Queer	Other	Not Given
Barnsley	69	14	23	11638
%	0%	0%	0%	6.9%
Calderdale	71	62	22	11488
%	0%	0%	0%	6.9%
Kirklees	147	58	61	25742
%	0%	0%	0%	7.4%
Wakefield	126	29	30	17945
%	0%	0%	0%	6.2%

Taken from Census 2021 data

The claims data does not include information on sexuality.

5e

Religion & Belief:

Prompt: Main faith groups and people with no belief or philosophical belief issues should be considered

Faith and spiritual care and support is an important component of person-centred care provided. The Trust have a spirit in mind service who play a central role in engaging faith and spiritual leaders in the communities we serve and involving them in the work of the Trust. Understanding religion and belief plays an important role in service delivery and as such the analysis of complaints which relate to religion and belief are reviewed and shared with Care Groups and services. There is further work to do to ensure this analysis support all people and enables learning from complaints.

There is no impact from the policy on religion or belief.

	Christian	Buddhist	Hindu	Jewish	Muslim	Sikh	Other	No religion	Not answered
England									
Number	26,167,899	262,433	1,020,533	269,283	3,801,186	420,383	332,410	20,715,664	3,400,548
Percentage	46.3%	0.5%	1.8%	0.5%	6.7%	0.9%	0.6%	36.7%	6.0%
Barnsley									
Number	125,502	435	416	62	1404	256	862	102,906	12,728
Percentage	51.3%	0.2%	0.2%	0%	0.6%	0.1%	0.4%	42.1%	5.2%
Calderdale									
Number	85,677	630	1173	153	19,650	387	1045	86,787	11,129
Percentage	41.5%	0.3%	0.6%	0.1%	9.5%	0.2%	0.5%	42%	5.4%
Kirklees									
Number	170,577	996	1723	187	80,046	3476	1663	150,599	23,949
Percentage	39.4%	0.2%	0.4%	0%	18.5%	0.8%	0.4%	34.8%	5.5%
Wakefield									
Number	173,070	797	1270	127	11,279	501	1405	145,950	18,972
Percentage	49%	0.2%	0.4%	0%	3.2%	0.1%	0.4%	41.3%	5.4%

Taken from 2021 Census data

		The claims data does not include information on religion and belief.																																																																																																
5f	<p>Marriage and Civil Partnership</p> <p>Prompt: Single, Married, Co-habiting, Widowed, Civil Partnership status are included in this category</p>	<p>There is no impact on marriage or civil partnership from this policy.</p> <table><tr><td></td><td>Married or in a registered civil partnership</td><td>Single - never married and never registered in a civil partnership</td><td>Divorced</td><td>Widowed</td><td>Separated</td></tr><tr><td>England</td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>Number</td><td>20,561,642</td><td>17,450,122</td><td>4,171,639</td><td>2,790,036</td><td>1,033,518</td></tr><tr><td>% average</td><td>44.7%</td><td>37.9%</td><td>9.1%</td><td>6.1%</td><td>2.2%</td></tr><tr><td>Barnsley</td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>Number</td><td>87,177</td><td>73,099</td><td>21,183</td><td>13,531</td><td>4,799</td></tr><tr><td>% average</td><td>43.6%</td><td>36.6%</td><td>10.6%</td><td>6.8%</td><td>2.4%</td></tr><tr><td>Calderdale</td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>Number</td><td>73,651</td><td>60,324</td><td>17,611</td><td>10,794</td><td>4,254</td></tr><tr><td>% average</td><td>44.2%</td><td>36.2%</td><td>10.6%</td><td>6.5%</td><td>2.6%</td></tr><tr><td>Kirklees</td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>Number</td><td>159,426</td><td>125,290</td><td>32,022</td><td>21,509</td><td>8,027</td></tr><tr><td>% average</td><td>46%</td><td>36.2%</td><td>9.2%</td><td>6.2%</td><td>2.3%</td></tr><tr><td>Wakefield</td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>Number</td><td>127,965</td><td>103,484</td><td>30,105</td><td>19,017</td><td>6,966</td></tr><tr><td>% average</td><td>44.5%</td><td>36%</td><td>10.5%</td><td>6.6%</td><td>2.4%</td></tr></table> <p>Taken from 2021 Census data</p> <p>The claims data does not include information on marriage and civil partnership.</p>		Married or in a registered civil partnership	Single - never married and never registered in a civil partnership	Divorced	Widowed	Separated	England						Number	20,561,642	17,450,122	4,171,639	2,790,036	1,033,518	% average	44.7%	37.9%	9.1%	6.1%	2.2%	Barnsley						Number	87,177	73,099	21,183	13,531	4,799	% average	43.6%	36.6%	10.6%	6.8%	2.4%	Calderdale						Number	73,651	60,324	17,611	10,794	4,254	% average	44.2%	36.2%	10.6%	6.5%	2.6%	Kirklees						Number	159,426	125,290	32,022	21,509	8,027	% average	46%	36.2%	9.2%	6.2%	2.3%	Wakefield						Number	127,965	103,484	30,105	19,017	6,966	% average	44.5%	36%	10.5%	6.6%	2.4%
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5g	<p>Pregnancy and Maternity</p> <p>Prompt: Currently pregnant or have been pregnant in the last 12 months should be considered</p>	<p>There is no impact on pregnancy and maternity from this policy.</p> <table><tr><td></td><td></td><td>Live births</td><td>Total fertility rate (TFR)</td></tr><tr><td rowspan="3">England</td><td>2019</td><td>610,505</td><td>1.66</td></tr><tr><td>2020</td><td>585,195</td><td>1.59</td></tr><tr><td>2021</td><td>595,948</td><td>1.55</td></tr><tr><td rowspan="3">Barnsley</td><td>2019</td><td>2,685</td><td>1.76</td></tr><tr><td>2020</td><td>2,504</td><td>1.64</td></tr><tr><td>2021</td><td>2,521</td><td>1.63</td></tr><tr><td rowspan="3">Calderdale</td><td>2019</td><td>2,163</td><td>1.72</td></tr><tr><td>2020</td><td>2,100</td><td>1.69</td></tr><tr><td>2021</td><td>2,143</td><td>1.71</td></tr><tr><td rowspan="3">Kirklees</td><td>2019</td><td>4,899</td><td>1.78</td></tr><tr><td>2020</td><td>4,733</td><td>1.72</td></tr><tr><td>2021</td><td>4,826</td><td>1.72</td></tr><tr><td rowspan="3">Wakefield</td><td>2019</td><td>3,928</td><td>1.78</td></tr><tr><td>2020</td><td>3,844</td><td>1.72</td></tr><tr><td>2021</td><td>3857</td><td>1.68</td></tr></table> <p>The Total Fertility Rate (TFR) is the average number of live children that a group of women would have if they experienced the age-specific fertility rates of the calendar year in question throughout their childbearing lifespan. The national TFRs have been calculated using mid-year population estimates by single year of age. The sub-national TFRs have been calculated using mid-year population estimates by single year age group</p> <p>Taken from: Births in England and Wales: summary tables - Office for National Statistics (ons.gov.uk)</p>			Live births	Total fertility rate (TFR)	England	2019	610,505	1.66	2020	585,195	1.59	2021	595,948	1.55	Barnsley	2019	2,685	1.76	2020	2,504	1.64	2021	2,521	1.63	Calderdale	2019	2,163	1.72	2020	2,100	1.69	2021	2,143	1.71	Kirklees	2019	4,899	1.78	2020	4,733	1.72	2021	4,826	1.72	Wakefield	2019	3,928	1.78	2020	3,844	1.72	2021	3857	1.68																																										
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		The claims data does not include information on pregnancy and maternity.																																																	
5h	<p>Gender Re-assignment</p> <p>Prompt: Transgender issues should be considered</p>	<p>There is no impact on gender re-assignment from this policy.</p> <table><tr><td></td><td colspan="2">Gender identity the same as sex registered at birth</td><td colspan="2">Gender identity different from sex registered at birth</td><td colspan="2">Not answered</td></tr><tr><td></td><td>Number</td><td>Percentage</td><td>Number</td><td>Percentage</td><td>Number</td><td>Percentage</td></tr><tr><td>England</td><td>43,002,331</td><td>93.47 %</td><td>251,844</td><td>0.55%</td><td>2,752,783</td><td>5.98%</td></tr><tr><td>Barnsley</td><td>189640</td><td>94.92 %</td><td>803</td><td>0.74%</td><td>9389</td><td>4.70%</td></tr><tr><td>Calderdale</td><td>156893</td><td>94.16 %</td><td>829</td><td>0.89%</td><td>8966</td><td>5.38%</td></tr><tr><td>Kirklees</td><td>323432</td><td>93.40 %</td><td>1,725</td><td>0.9%</td><td>21214</td><td>6.13%</td></tr><tr><td>Wakefield</td><td>271795</td><td>94.52 %</td><td>1,280</td><td>0.81%</td><td>14539</td><td>5.06%</td></tr></table> <p><i>Taken from Census 2021 data</i></p> <p>NB: Percentages are calculated from the total usual resident population aged 16 years and over.</p> <p>According to information shared by Stonewall there is no accurate data available on the number of individuals identifying as Trans across communities.</p> <p>SWYPFT has made additions to data collection through incident reporting to capture specifics of sexuality and identify to better inform the insights in respect to our patient populations.</p> <p>Estimates offered by stonewall is suggestive of 1% of the population may identify as Trans of non-binary The truth about trans (stonewall.org.uk)</p> <p>Based on Trust Wide Populations this would suggest anything up to 12.500 individuals who may identify as Trans, non-binary, or face challenges in transitioning and being accepted as Trans.</p> <p>The claims data does not include information on gender re-assignment.</p>		Gender identity the same as sex registered at birth		Gender identity different from sex registered at birth		Not answered			Number	Percentage	Number	Percentage	Number	Percentage	England	43,002,331	93.47 %	251,844	0.55%	2,752,783	5.98%	Barnsley	189640	94.92 %	803	0.74%	9389	4.70%	Calderdale	156893	94.16 %	829	0.89%	8966	5.38%	Kirklees	323432	93.40 %	1,725	0.9%	21214	6.13%	Wakefield	271795	94.52 %	1,280	0.81%	14539	5.06%
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5I	<p>Carers</p> <p>Prompt: Caring responsibilities paid or unpaid, hours this is done should be considered</p>	<p>It is not anticipated there will be any negative impact on service users or their carers from this policy.</p> <table><tr><td></td><td></td><td colspan="2">Provider of unpaid Care</td></tr><tr><td></td><td></td><td>Yes</td><td>No</td></tr><tr><td rowspan="2">England</td><td>Number</td><td>4678265</td><td>48734833</td></tr><tr><td>Percentage</td><td>8.3%</td><td>86.3%</td></tr><tr><td rowspan="2">Barnsley</td><td>Number</td><td>24732</td><td>206377</td></tr><tr><td>Percentage</td><td>10.1%</td><td>84.4%</td></tr><tr><td rowspan="2">Calderdale</td><td>Number</td><td>17977</td><td>206631</td></tr><tr><td>Percentage</td><td>8.7%</td><td>85.8%</td></tr><tr><td rowspan="2">Kirklees</td><td>Number</td><td>37034</td><td>371038</td></tr><tr><td>Percentage</td><td>8.5%</td><td>85.6%</td></tr><tr><td rowspan="2">Wakefield</td><td>Number</td><td>31731</td><td>301565</td></tr><tr><td>Percentage</td><td>6.1%</td><td>85.3%</td></tr></table>			Provider of unpaid Care				Yes	No	England	Number	4678265	48734833	Percentage	8.3%	86.3%	Barnsley	Number	24732	206377	Percentage	10.1%	84.4%	Calderdale	Number	17977	206631	Percentage	8.7%	85.8%	Kirklees	Number	37034	371038	Percentage	8.5%	85.6%	Wakefield	Number	31731	301565	Percentage	6.1%	85.3%						
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		<div>Taken from Census 2011 data</div> <div>NB: Missing values account for 'N/A' or 'not answered'</div> <div>The claims data does not include information on carers.</div> <div>The Trust has implemented carers passports, this document helps identify individuals with caring responsibilities.</div> <div>Carers passport (sharepoint.com)</div>																																																												
5j	<div>Race</div> <div>Prompt: Indigenous population and BME Groups such as Black African and Caribbean, Mixed Heritage, South Asian, Chinese, Irish, new Migrant, Asylum & Refugee, Gypsy & Travelling communities.)</div>	<div>Ward staff should provide information in different languages and formats, the Trust's interpretation service should be able to assist if this is not available.</div> <table><thead><tr><th></th><th>White</th><th>Asian</th><th>Black</th><th>Mixed</th><th>Chinese & Other</th></tr></thead><tbody><tr><td>England % av.</td><td>81%</td><td>9.6%</td><td>4.2%</td><td>3%</td><td>2.2%</td></tr><tr><td>Kirklees</td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>% average</td><td>73.6%</td><td>19.4%</td><td>2.3%</td><td>3.1%</td><td>1.5%</td></tr><tr><td>Barnsley</td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>% average</td><td>96.9%</td><td>0.9%</td><td>0.7%</td><td>0.9%</td><td>0.5%</td></tr><tr><td>Calderdale</td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>% average</td><td>86.1%</td><td>10.5%</td><td>0.7%</td><td>1.9%</td><td>0.8%</td></tr><tr><td>Wakefield</td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>% average</td><td>93%</td><td>3.6%</td><td>1.3%</td><td>1.4%</td><td>0.7%</td></tr></tbody></table> <div>Taken from Census 2021 for each area</div> <div>The claims data does not include information on race.</div>		White	Asian	Black	Mixed	Chinese & Other	England % av.	81%	9.6%	4.2%	3%	2.2%	Kirklees						% average	73.6%	19.4%	2.3%	3.1%	1.5%	Barnsley						% average	96.9%	0.9%	0.7%	0.9%	0.5%	Calderdale						% average	86.1%	10.5%	0.7%	1.9%	0.8%	Wakefield						% average	93%	3.6%	1.3%	1.4%	0.7%
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Action Plan

EIAs are now reviewed using a grading approach which is in line with our Equality Delivery System (EDS). This rates the quality of the EIA. This means that the team can review the EIA and make recommendations only. The rating and suggested standards are set out below:

- **Under-developed** – red – **No data. No strands** of equality
- **Developing** – amber – **Some census data plus workforce. Two strands** of equality addressed
- **Achieving** – green – **Some census data plus workforce. Five strands** of equality addressed
- **Excelling** – purple – **All the data and all the strands** addressed

Potential themes for actions: Geographical location, built environment, timing, costs of the service, make up of your workforce, stereotypes and assumptions, equality monitoring, community relations/cohesion, same sex wards and care, specific issues/barriers.

Who will benefit from this action? (tick all that apply)		Action 1: This is what we are going to do	Lead/s	By when	Update -outcome	RAG
Age	X	We will continue to review incidents as they occur, these are logged and reported quarterly to Audit Committee. Trends will be identified over incidents based on the information we receive on the form. The form is being reviewed and updated, consideration will be given to capture more information and data as it is acknowledged that we have limited data on protected characteristics.	Susan Baines	31/03/25		
Disability						
Gender reassignment						
Marriage and civil partnership						
Race						
Religion or belief						
Sex	X					
Sexual Orientation						
Pregnancy maternity						
Carers						

Who will benefit from this action? (tick all that apply)		Action 2: This is what we are going to do	Lead/s	By when	Update -outcome	RAG
Age	X	The operational lead will review the policy and identify any areas that need improving and develop an action plan.	Operational Lead (TBC)	31/03/25		
Disability	X					
Gender reassignment	X					
Marriage and civil partnership	X					
Race	X					
Religion or belief	X					
Sex	X					
Sexual Orientation	X					
Pregnancy maternity	X					
Carers	X					

Who will benefit from this action? (tick all that apply)		Action 3: This is what we are going to do	Lead/s	By when	Update -outcome	RAG
Age	<input type="checkbox"/>					
Disability	<input type="checkbox"/>					
Gender reassignment	<input type="checkbox"/>					
Marriage and civil partnership	<input type="checkbox"/>					
Race	<input type="checkbox"/>					
Religion or belief	<input type="checkbox"/>					
Sex	<input type="checkbox"/>					
Sexual Orientation	<input type="checkbox"/>					
Pregnancy maternity	<input type="checkbox"/>					
Carers	<input type="checkbox"/>					

Involvement & Insight: New or Previous (please include any evidence of activity undertaken in the box below)

Standard form for claims available via the intranet. This is being reviewed and updated.

<https://swyt.sharepoint.com/sites/Intranet/finance-procurement/Pages/Forms.aspx>

7 Methods of Monitoring progress on Actions

12 monthly review of this policy

Audit of data which is available via Trust reports

Review of feedback from various sources such as compliment and complaints.

8 Publishing the Equality Impact Assessment

Intranet/Internet as an appendix to SUP policy

The Equality Impact Assessment will be shared on the Trust website.

- This EIA will be shared with InvolvingPeople@swyt.nhs.uk who will publish as they see fit.

The EIA has been graded as **Underdeveloped** by Aboo Bhana Equality and Involvement Manager, as both the involvement/consultations section and the action plan are incomplete.

9 Signing off Equality Impact Assessment:



Service Manager

Once approved, you must forward a copy of this Assessment/Action Plan by email to:
InvolvingPeople@swyt.nhs.uk

Please note that the EIA is a public document and will be published on the web.

Failing to complete an EIA could expose the Trust to future legal challenge.

Appendix B - Checklist for the review and approval of policy document

	Title of document being reviewed:	Yes/No/ Unsure	Comments
1.	Title		
	Is the title clear and unambiguous?	Yes	
	Is it clear whether the document is a guideline, policy, protocol or standard?	Yes	
	Is it clear in the introduction whether this document replaces or supersedes a previous document?	Yes	
2.	Rationale		
	Are reasons for development of the document stated?	Yes	
3.	Development Process		
	Is the method described in brief?	Yes	
	Are people involved in the development identified?	Yes	
	Do you feel a reasonable attempt has been made to ensure relevant expertise has been used?	Yes	
	Is there evidence of consultation with stakeholders and users?	Yes	
	Is there evidence that a trauma-informed 'lens' has been applied? e.g. through use of language etc.	Yes	
4.	Content		
	Is the objective of the document clear?	Yes	
	Is the target population clear and unambiguous?	Yes	
	Are the intended outcomes described?	Yes	
	Are the statements clear and unambiguous?	Yes	
5.	Evidence Base		
	Is the type of evidence to support the document identified explicitly?	Yes	
	Are key references cited?	Yes	
	Are the references cited in full?	Yes	
	Are supporting documents referenced?	Yes	
6.	Approval		
	Does the document identify which	Yes	

	committee/group will approve it?		
	If appropriate have the joint People Directorate Human Resources/staff side committee (or equivalent) approved the document?	Yes	N/A
7.	Dissemination and Implementation		
	Is there an outline/plan to identify how this will be done?	Yes	
	Does the plan include the necessary training/support to ensure compliance?	Yes	
8.	Document Control		
	Does the document identify where it will be held?	Yes	
	Have archiving arrangements for superseded documents been addressed?	Yes	
9.	Process to Monitor Compliance and Effectiveness		
	Are there measurable standards or KPIs to support the monitoring of compliance with and effectiveness of the document?	Yes	
	Is there a plan to review or audit compliance with the document?	Yes	
10.	Review Date		
	Is the review date identified?	Yes	
	Is the frequency of review identified? If so is it acceptable?	Yes	
11.	Overall Responsibility for the Document		
	Is it clear who will be responsible implementation and review of the document?	Yes	

Appendix C - Version control sheet for policy document

Version	Date	Author	Status	Comment / changes
1	July 2013	Head of Financial Accounting	Final	Final version approved by EMT
2	March 2015	Head of Financial Accounting	Final	Changes made to update to current NHS Protect guidance
3	March 2017	Head of Financial Accounting	Final	Changes made to comply with Trust policy on policies. Minor changes to practice, emphasis on Ward Manager responsibility for ensuring having a policy in place.
4	December 2019	Head of Financial Accounting	Final	Changes made to update names, job titles and to add a section on Universal Credit
5	October 2023	Head of Financial Accounting	Final	Policy amended to remove procedural processes into separate Financial and Operational procedures and leave an overarching high-level policy.

Private Property

Please note that the South West Yorkshire Partnership NHS Foundation Trust accepts no responsibility for the loss of or damage to personal property of any kind, including money, unless it is handed in for safekeeping and an official receipt is obtained from the ward staff, the patient affairs officer or a cashier.

This applies for all property, in whatever way the loss or damage may occur