



Balance & Bloom
OCCUPATIONAL THERAPY

Policy Manual

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Advocacy, Accessibility, Diversity & Inclusion Policy

1. Purpose

This policy establishes Balance & Bloom Occupational Therapy's commitment to providing accessible, inclusive and respectful occupational therapy services that recognise the individual needs, rights, preferences, culture and circumstances of each client.

2. Inclusion and Diversity

Balance & Bloom Occupational Therapy recognises and respects diversity, including differences relating to:

- Disability.
- Age.
- Culture.
- Aboriginal and Torres Strait Islander identity.
- Language.
- Communication.
- Gender.
- Sexual orientation.
- Religion and beliefs.
- Family circumstances.
- Socioeconomic circumstances.
- Individual abilities and support needs.

Services will be provided without discrimination and with consideration of each client's individual circumstances.

3. Accessibility

Balance & Bloom Occupational Therapy will take reasonable steps to reduce barriers to accessing and participating in occupational therapy.

This may include consideration of:

- Physical accessibility.
- Mobility requirements.
- Sensory needs.
- Communication requirements.
- Cognitive accessibility.
- Appointment times.
- Environmental factors.
- Information formats.
- Additional processing time.
- Communication supports or interpreters.
- Assistive technology.
- Telehealth where appropriate.

4. Reasonable Adjustments

Where a client experiences a barrier to accessing or participating in services, Balance & Bloom Occupational Therapy will consider reasonable adjustments.

Adjustments may include:

- Modifying the physical environment.
- Changing the appointment time.
- Providing additional time.
- Allowing breaks.
- Modifying assessment or intervention approaches.
- Providing information in an alternative format.
- Using visual supports.
- Involving a support person.
- Changing communication methods.

5. Advocacy

Balance & Bloom Occupational Therapy will support clients to understand and express their rights, preferences and choices.

This may include supporting a client to:

- Understand their options.
- Express their preferences.
- Prepare for meetings.
- Understand assessment findings and recommendations.
- Identify questions they wish to ask.
- Access appropriate services.
- Access an independent advocate.
- Participate in decisions affecting them.

Balance & Bloom Occupational Therapy will not make decisions on behalf of a client who is able to make their own decisions.

6. Families, Carers and Support Networks

Where appropriate and with relevant consent, Balance & Bloom Occupational Therapy may work collaboratively with:

- Parents.
- Carers.
- Support workers.
- Teachers.
- Employers.
- Support coordinators.
- Other health professionals.
- Other relevant members of the client's support network.

The client's rights, preferences and confidentiality will remain central to this collaboration.

7. Cultural Responsiveness

Balance & Bloom Occupational Therapy recognises that culture may influence communication, family relationships, decision-making, disability, health and participation.

The practitioner will:

- Respect cultural identity and preferences.
- Avoid assumptions or stereotypes.
- Consider culturally appropriate communication.
- Support access to interpreters or other appropriate supports where required.

- Respect Aboriginal and Torres Strait Islander connections to culture, family, community and Country.

8. Children and Young People

Children and young people will be supported to participate in decisions affecting them in a manner appropriate to their age, development and capacity.

Their communication, preferences and individual needs will be considered alongside the involvement of parents or legally authorised decision-makers.

9. Discrimination

Balance & Bloom Occupational Therapy does not tolerate discrimination, harassment, abuse or exclusion.

Concerns relating to discrimination will be managed in accordance with the Complaints & Feedback Policy and, where relevant, the Safeguarding, Abuse, Neglect & Exploitation Policy.

10. Policy Review

This policy will be reviewed at least annually, or earlier where required due to legislative, regulatory, professional or operational changes.

Effective Date: 01/11/2026

Next Review Date: 01/11/2027

Assessment & Clinical Reasoning Policy

1. Purpose

Balance & Bloom Occupational Therapy provides occupational therapy assessments that are relevant to the client's goals, circumstances, occupational needs and referral question.

2. Assessment Principles

Assessments will be:

- Person-centred.
- Evidence-informed.
- Appropriate to the referral goals and needs.
- Within scope.
- Culturally responsive.
- Developmentally appropriate.
- Sensitive to communication needs.

3. Assessment Methods

Assessment may include:

- Clinical interview.
- Observation.
- Standardised and non-standardised assessments.
- Task analysis.
- Self-report.
- Carer/family report.
- Collateral information.
- Review of existing records.
- Consultation with other professionals.

4. Clinical Reasoning

Clinical reasoning will consider:

- Client goals.
- Strengths.
- Functional abilities.
- Limitations.
- Environment.
- Occupational demands.
- Safety.
- Context.
- Available evidence.

5. Self-Report and Collateral Information

Self-report will be considered alongside observation and other available information where appropriate.

Where there are discrepancies, the practitioner will document relevant clinical reasoning rather than assuming one information source is automatically more accurate.

6. Assessment Limitations

Where assessment findings may be affected by various factors including fatigue, unfamiliar environments and time limitations, these will be considered when interpreting results.

7. Policy Review

This policy will be reviewed at least annually, or earlier where required due to legislative, regulatory, professional or operational changes.

Effective Date: 01/11/2026

Next Review Date: 01/11/2027

Assistive Technology & Equipment Policy

1. Purpose

Balance & Bloom Occupational Therapy is committed to recommending and prescribing assistive technology that is appropriate, safe, functional and aligned with the client's goals.

2. Assessment

Assessment will consider:

- Client needs.
- Functional goals.
- Environment.
- Physical capacity.
- Cognitive capacity.
- Sensory needs.
- Safety.
- Carer/support capacity.
- Equipment suitability.
- Cost and value.
- Availability.

3. Trials

Where appropriate, equipment must be trialled before recommendation or purchase.

Trials may identify:

- Fit.
- Usability.
- Safety.
- Function.
- Client acceptance.
- Environmental suitability.

4. Recommendations

Recommendations will identify:

- The equipment.
- Intended purpose.
- Functional need.
- Relevant specifications.
- Safety considerations.
- Training requirements.
- Maintenance requirements.
- Alternatives considered where relevant.

5. Supplier Relationships

The practitioner will maintain professional independence and will not recommend equipment solely because of supplier relationships or financial incentives.

6. Training

Where equipment requires training, appropriate instruction will be provided or arranged.

7. Review

Equipment recommendations may require review where:

- Client circumstances change.
- Equipment becomes unsuitable.
- Equipment is no longer safe.
- The client's goals or needs change.
- More appropriate equipment becomes available.

8. Policy Review

This policy will be reviewed at least annually, or earlier where required due to legislative, regulatory, professional or operational changes.

Effective Date: 01/11/2026

Next Review Date: 01/11/2027

Child Safe Practice Policy

1. Purpose

This policy establishes Balance & Bloom Occupational Therapy's commitment to creating a safe, respectful and inclusive environment for children and young people accessing occupational therapy services.

Balance & Bloom recognises that children have the right to be safe, listened to, respected and supported to participate in decisions affecting them.

The policy aligns with the principles of the NSW Child Safe Standards, which provide a framework for preventing, identifying and responding to harm and promoting child-safe practices.

2. Child Safety

Balance & Bloom Occupational Therapy is committed to:

- Prioritising the safety and wellbeing of children.
- Listening to children and taking their views seriously.
- Supporting children to participate in decisions affecting them.
- Maintaining appropriate professional boundaries.
- Recognising and responding to concerns about abuse, neglect or exploitation.
- Providing child-friendly opportunities to raise concerns.
- Maintaining safe physical and online environments.
- Continually reviewing and improving child-safe practices.

3. Participation of Children

Children and young people will be supported to:

- Express their views.
- Ask questions.
- Make choices.
- Participate in therapy decisions.
- Communicate discomfort or concerns.
- Provide feedback.
- Raise complaints.

Children may communicate through speech, gestures, behaviour, facial expressions, drawings, augmentative and alternative communication or other individual communication methods.

Their views will be considered in a manner appropriate to their age, development and capacity.

4. Child-Centred Practice

Occupational therapy will be adapted to the individual child, including consideration of:

- Developmental level.
- Communication style.
- Sensory needs.
- Cognitive abilities.
- Emotional state.
- Culture.
- Strengths.
- Interests.
- Preferences.

Where a child becomes distressed or indicates that they do not wish to continue an activity, the practitioner will consider whether the activity should be modified, paused or discontinued.

5. Professional Boundaries

Balance & Bloom Occupational Therapy will maintain appropriate professional boundaries when working with children.

The practitioner will:

- Maintain professional relationships.
- Use physical contact only where clinically appropriate.
- Explain physical contact where reasonably practicable.
- Respect the child's privacy and dignity.
- Avoid unnecessary isolation.
- Maintain appropriate communication outside appointments.
- Avoid personal social media contact with children.
- Maintain clear professional boundaries.

6. Physical and Online Environments

Balance & Bloom Occupational Therapy will consider risks within physical and online environments, including:

- Privacy.
- Visibility.
- Environmental hazards.
- Access to unsafe equipment.
- Opportunities for inappropriate isolation.
- Digital communication.
- Online privacy.
- Access to confidential information.

Risks will be managed in accordance with the Risk Management & Work Health and Safety Policy and relevant digital and privacy policies.

The NSW Child Safe Standards specifically require physical and online environments to minimise opportunities for abuse to occur.

7. Children Experiencing Increased Vulnerability

Balance & Bloom Occupational Therapy recognises that some children may experience increased vulnerability, including children who:

- Have disability.
- Have communication difficulties.
- Communicate non-verbally.
- Have cognitive disability.
- Have complex support needs.
- Rely on others for personal care.
- Have experienced trauma.
- Have difficulty reporting concerns.
- Require support from multiple adults.

Additional consideration will be given to ensuring these children can communicate their views, access information and raise concerns.

8. Recognising Concerns

The practitioner will remain alert to indicators of:

- Physical abuse.
- Sexual abuse.
- Emotional or psychological abuse.
- Neglect.
- Exploitation.
- Family violence.
- Grooming.
- Bullying.
- Inappropriate conduct by an adult.
- Other circumstances that may place a child at risk.

Concerns will be taken seriously and managed appropriately.

9. Responding to a Disclosure

Where a child discloses information indicating possible harm or abuse, the practitioner will:

- Remain calm.
- Listen carefully.
- Take the child seriously.
- Avoid leading or investigative questioning.
- Avoid promising confidentiality.
- Document the disclosure accurately and objectively.
- Take appropriate protective or reporting action.
- Seek advice from the relevant authority where required.

The practitioner will not undertake their own investigation into allegations of abuse.

10. Child Protection and Mandatory Reporting

Where the practitioner has a mandatory reporting obligation, the applicable requirements will be followed.

Where there is an immediate risk of serious harm, emergency services will be contacted.

Child safety concerns will also be managed in accordance with the Safeguarding, Abuse, Neglect & Exploitation Policy.

11. Parents and Carers

Parents and carers will generally be involved in children's occupational therapy services, subject to:

- Consent requirements.
- The child's age and maturity.
- The child's views.
- Privacy considerations.
- Clinical considerations.
- Legal requirements.
- Child safety considerations.

The involvement of a parent or carer will not prevent a child from being listened to or raising a concern.

12. Child-Friendly Complaints

Children will be supported to understand that they can raise concerns or make a complaint.

Complaints information will be adapted to the child's age, developmental level, communication style and accessibility requirements.

Children will not be disadvantaged because they make a complaint, disagree with a recommendation, express discomfort or provide negative feedback.

The NSW Child Safe Standards require child-focused complaints processes and that children's concerns are taken seriously.

13. Working With Children Check

Balance & Bloom Occupational Therapy will maintain a valid Working With Children Check where required under NSW legislation, and a valid Working With Vulnerable People check where required under ACT legislation. .

As a sole practitioner, responsibility for maintaining the required clearance rests with the practitioner.

The status and expiry date of the Working With Children Check/Working With Vulnerable People check will be monitored.

14. Child Safe Education

The practitioner will maintain appropriate knowledge and skills relating to:

- Child protection.
- Recognising indicators of abuse and neglect.
- Mandatory reporting.
- Responding to disclosures.
- Professional boundaries.
- Child safe practice.
- Trauma-informed practice.
- Disability-related vulnerability.
- Relevant legislative and regulatory changes.

15. Continuous Improvement

Balance & Bloom Occupational Therapy will regularly review child-safe practice.

The NSW Child Safe Standards require organisations to continuously review and improve child-safe practices.

16. Policy Review

This policy will be reviewed at least annually, or earlier where required due to legislative, regulatory, professional or operational changes.

Effective Date: 01/11/2026

Next Review Date: 01/11/2027

Client Rights & Responsibilities Policy

1. Purpose

Balance & Bloom Occupational Therapy recognises that every client has the right to receive safe, respectful, accessible and person-centred occupational therapy services.

2. Scope

This policy applies to all clients receiving services from Balance & Bloom Occupational Therapy, including children, young people, adults, older people, NDIS participants and private clients.

3. Client Rights

Clients have the right to:

- Be treated with dignity and respect.
- Receive safe and appropriate services.
- Participate in decisions about their care.
- Have their preferences and goals considered.
- Receive information in a way they can understand.
- Ask questions.
- Decline or withdraw from services.
- Have their privacy protected.
- Access their information.
- Provide feedback.
- Make a complaint without fear of disadvantage.
- Use an advocate or support person.
- Be free from abuse, neglect, exploitation, discrimination and violence.
- Receive services that respect their culture, identity, values and beliefs.

These principles align with the NDIS focus on dignity, respect, choice, control, safety and quality, which applies to people receiving NDIS services from registered and unregistered providers.

4. Client Responsibilities

Clients are expected to:

- Provide accurate information relevant to their care.
- Communicate changes that may affect service delivery.
- Treat the practitioner respectfully.
- Provide a reasonably safe environment for home visits.
- Participate in assessment and intervention as they are able.
- Respect agreed appointment arrangements and cancellation terms.
- Meet agreed payment obligations.

5. Advocacy

Clients may choose an advocate, support person or other representative to assist them.

Balance & Bloom Occupational Therapy will support clients to:

- Identify an advocate.
- Communicate their preferences.
- Participate in decisions.
- Raise concerns.
- Make complaints.

The practitioner will not make decisions on behalf of a client merely because the client has an advocate.

6. Dignity of Risk

Balance & Bloom Occupational Therapy recognises that people have the right to make informed choices, including choices involving reasonable risk.

The practitioner will:

- Identify relevant risks.
- Provide appropriate information.
- Discuss safer alternatives.
- Support informed decision-making.
- Respect client autonomy where appropriate.

Safety will not automatically be used as a reason to restrict a person's choices or independence.

7. Complaints

Clients will be informed of their right to provide feedback or make a complaint.

Making a complaint will not result in adverse treatment or withdrawal of services solely because a complaint has been made.

8. Policy Review

This policy will be reviewed at least annually, or earlier where required due to legislative, regulatory, professional or operational changes.

Effective Date: 01/11/2026

Next Review Date: 01/11/2027

Clinical Documentation, Records & Report Writing Policy

1. Purpose

Balance & Bloom Occupational Therapy will maintain accurate, timely, objective and secure clinical records.

2. Clinical Records

Records may include:

- Referral information.
- Consent.
- Assessment findings.
- Clinical observations and reasoning.
- Progress notes.
- Reports.
- Communication records.
- Incident information.
- Discharge information.

3. Documentation Standards

Records should be:

- Accurate.
- Objective.
- Relevant.
- Timely.
- Clear.
- Respectful.
- Clinically defensible.

4. Corrections

Clinical records will not be deleted or altered in a way that obscures the original entry.

Corrections will be made transparently in accordance with the record system being used.

5. Reports

Reports will:

- Address the referral goal and needs.
- Clearly identify the assessment methods used.
- Present relevant findings.
- Explain functional impact.
- Identify limitations.
- Provide recommendations supported by the assessment.
- Avoid misleading or unsupported conclusions.

6. Reports for NDIS Purposes

Where reports are prepared for NDIS purposes, recommendations will be linked to functional needs and occupational impact rather than simply stating that funding is required.

7. Record Retention

Records will be retained securely for the period required by applicable legislation, professional obligations, funding arrangements and insurance requirements.

8. Access

Clients may request access to their personal and health information in accordance with applicable privacy law.

9. Policy Review

This policy will be reviewed at least annually, or earlier where required due to legislative, regulatory, professional or operational changes.

Effective Date: 01/11/2026

Next Review Date: 01/11/2027

Complaints & Feedback Policy

1. Purpose

Balance & Bloom Occupational Therapy welcomes feedback and complaints as an opportunity to improve service quality and client experience.

2. Scope

This policy applies to all feedback and complaints relating to Balance & Bloom's Occupational Therapy services.

3. Our Commitment

Balance & Bloom Occupational Therapy will:

- Take complaints seriously.
- Make complaints accessible.
- Treat people respectfully.
- Respond fairly.
- Maintain confidentiality.
- Avoid victimisation.
- Keep appropriate records.
- Use complaints to improve services.

All NDIS providers, including unregistered providers, are expected to effectively manage complaints.

4. Who Can Make a Complaint?

A complaint may be made by:

- A client.
- Parent or guardian.
- Family member.
- Carer.
- Advocate.
- Support coordinator.
- Other professional.
- Representative.
- Any other person with a legitimate concern.

5. How Complaints Can Be Made

Complaints may be made:

- In person.
- By telephone.
- By email.
- In writing.
- Through an advocate or support person.
- Anonymously, where practicable.

6. Managing Complaints

Balance & Bloom will:

1. Acknowledge the complaint.
2. Determine whether immediate action is required.
3. Clarify the concerns.

4. Review relevant information.
5. Consider the complainant's desired outcome.
6. Respond fairly.
7. Document actions and outcomes.
8. Identify any required improvements.

7. External Complaints

Clients may contact the NDIS Quality and Safeguards Commission regarding NDIS-related services.

The NDIS Commission can receive complaints about both registered and unregistered NDIS providers.

8. Victimisation

A person will not be threatened, disadvantaged or refused services simply because they have made a genuine complaint or provided negative feedback.

9. Review

Complaints will be reviewed periodically to identify recurring or systemic issues.

10. Policy Review

This policy will be reviewed at least annually, or earlier where required due to legislative, regulatory, professional or operational changes.

Effective Date: 01/11/2026

Next Review Date: 01/11/2027

Consent, Capacity & Decision-Making Policy

1. Purpose

Balance & Bloom Occupational Therapy recognises informed consent as fundamental to ethical occupational therapy practice.

2. Scope

This policy applies to assessment, intervention, information sharing, photography, telehealth, reports, referrals and other activities undertaken as part of occupational therapy services.

3. Consent

Consent must be:

- Voluntary.
- Informed.
- Relevant to the activity.
- Given by a person with appropriate decision-making capacity or an authorised decision-maker where applicable.
- Capable of being withdrawn.

4. Information Provided

Clients will receive appropriate information about:

- The proposed service.
- The purpose of assessment or intervention.
- What participation will involve.
- Relevant risks and benefits.
- Alternatives where relevant.
- Fees.
- Information sharing.
- Reports and recommendations.
- Their right to decline or withdraw.

5. Supporting Decision-Making

Balance & Bloom Occupational Therapy will support people to make their own decisions wherever possible.

This may include the use of visual information, providing extra time and engaging supports including interpreters and support personnel.

The presence of a disability, diagnosis, age or communication difficulty will not, by itself, be treated as evidence that a person lacks capacity.

6. Children and Young People

For children and young people, consent will be managed having regard to:

- Age.
- Development.
- Understanding.
- Capacity.
- Parent or guardian responsibilities.
- Applicable legislation.
- The child's or young person's views and preferences.

Children and young people will be involved in decisions affecting them to the extent appropriate to their development and capacity.

7. Withdrawal of Consent

A client may withdraw consent at any time.

Where consent is withdrawn, the practitioner will:

1. Stop the relevant activity where practicable.
2. Discuss any implications.
3. Consider alternatives.
4. Document the decision.

8. Information Sharing

Information will only be shared with other people or organisations where:

- The client has provided appropriate consent;
- disclosure is required or authorised by law; or
- disclosure is otherwise permitted under applicable privacy legislation.

9. Substitute Decision-Making

Where a person is unable to make a particular decision, Balance & Bloom Occupational Therapy will seek to identify the appropriate legally authorised decision-maker.

The practitioner will continue to involve the client as much as possible.

10. Policy Review

This policy will be reviewed at least annually, or earlier where required due to legislative, regulatory, professional or operational changes.

Effective Date: 01/11/2026

Next Review Date: 01/11/2027

Digital Technology, Artificial Intelligence & Telehealth Policy

1. Purpose

Balance & Bloom Occupational Therapy may use digital technologies to support administration, communication, clinical service delivery and business operations.

2. Appropriate Use

Technology will be used in a manner that:

- Protects privacy and supports client safety.
- Maintains professional standards.
- Remains within scope.

3. Artificial Intelligence

AI tools may be used for appropriate administrative or drafting purposes where privacy and confidentiality can be maintained.

Client-identifying information will not be entered into publicly available AI systems unless the system and use have been appropriately assessed and authorised.

AI-generated content will be reviewed by the practitioner before being used clinically or provided to a client.

The practitioner remains responsible for the accuracy of all information provided.

4. Telehealth

Telehealth may be used where clinically appropriate.

The practitioner will consider:

- Client preference.
- Privacy.
- Communication.
- Safety.
- Clinical suitability.

Telehealth will not be used where it creates an unacceptable clinical risk.

5. Digital Communication

Electronic communication may include:

- Email.
- SMS.
- Telephone.
- Secure client platforms.
- Video conferencing.

Clients will be informed about appropriate communication channels.

6. Policy Review

This policy will be reviewed at least annually, or earlier where required due to legislative, regulatory, professional or operational changes.

Effective Date: 01/11/2026

Next Review Date: 01/11/2027

Fees, Billing, Cancellation & Non-Attendance Policy

1. Purpose

This policy establishes transparent and consistent arrangements for fees, billing, cancellations and non-attendance with Balance & Bloom Occupational Therapy.

2. Fees

Clients will be informed of applicable fees before services commence wherever practicable.

Fees may include:

- Assessment and intervention.
- Report writing.
- Travel.
- Non-face-to-face work.
- Other agreed professional services.

3. NDIS Services

For NDIS participants, fees will be charged in accordance with applicable NDIS pricing requirements and the participant's funding arrangements where relevant.

As an unregistered provider, Balance & Bloom Occupational Therapy will only provide NDIS services through funding arrangements that permit use of an unregistered provider. Self-managed and plan-managed participants can generally choose unregistered providers, subject to applicable restrictions.

4. Cancellation

Cancellation of any scheduled appointment requires 48 hours' notice. Cancellation requirements will be outlined in the client service agreement. Where a cancellation fee applies, it will be charged consistently with the agreed terms and any applicable funding requirements.

5. Non-Attendance

Where a client does not attend an appointment without appropriate notice, the applicable cancellation/non-attendance fee may apply.

6. Financial Hardship

Where appropriate, clients experiencing financial difficulty may discuss alternative arrangements with Balance & Bloom Occupational Therapy. This must be discussed prior to engaging with services.

7. Outstanding Accounts

Where an account remains unpaid, Balance & Bloom Occupational Therapy will:

- Contact the client.
- Provide reminders.
- Discuss payment arrangements.
- Suspend non-essential services where appropriate.
- Take reasonable debt recovery action, with any debt recovery costs being borne by the client.

8. Policy Review

This policy will be reviewed at least annually, or earlier where required due to legislative, regulatory, professional or operational changes.

Effective Date: 01/11/2026

Next Review Date: 01/11/2027

Governance Policy

1. Purpose

Balance & Bloom Occupational Therapy is committed to maintaining effective governance and clinical governance systems that support the delivery of safe, ethical, person-centred, evidence-informed, and high-quality occupational therapy services.

As a sole practitioner, the Practice Owner is responsible for the governance, clinical, operational, legal and regulatory requirements of Balance & Bloom Occupational Therapy.

This policy outlines our approach to maintaining appropriate governance, managing risk, monitoring the quality and safety of services, maintaining professional competence, and supporting continuous improvement in accordance with applicable legislation, professional standards, regulatory requirements and funding body requirements.

2. Scope

This policy applies to all occupational therapy services provided by Balance & Bloom Occupational Therapy, including, but not limited to:

- NDIS-funded services.
- Aged care services.
- Private occupational therapy services.
- Clinical and functional reporting.
- Consultation and collaboration with other health and community service providers.

3. Definitions

Clinical Governance:

The systems, processes and responsibilities through which Balance & Bloom Occupational Therapy maintains and improves the quality, safety and effectiveness of clinical services.

Governance:

The systems and processes used to ensure Balance & Bloom Occupational Therapy meets its legal, regulatory, professional, ethical, financial and operational responsibilities.

Continuous Improvement:

An ongoing process of reviewing practice, identifying opportunities for improvement, implementing changes and evaluating whether those changes have improved the quality and safety of services.

Scope of Practice:

The professional activities that the practitioner is educated, trained, competent and appropriately experienced to undertake.

Practice Owner:

The person responsible for the operation, governance and clinical management of Balance & Bloom Occupational Therapy.

4. Governance Responsibilities

Balance & Bloom Occupational Therapy is operated as a sole-practitioner occupational therapy business.

The Practice Owner is responsible for:

- Maintaining current occupational therapy registration and meeting applicable professional registration requirements.
- Maintaining appropriate professional indemnity and public liability insurance.

- Maintaining compliance with relevant legislation, regulations, professional standards and contractual requirements.
- Maintaining appropriate business and clinical governance systems.
- Maintaining appropriate policies and procedures.
- Identifying and managing clinical, operational, financial, privacy and safety risks.
- Maintaining accurate and appropriate client records, including privacy and confidentiality.
- Obtaining appropriate consent for assessment, intervention and information sharing.
- Managing complaints and feedback.
- Responding appropriately to incidents and safeguarding concerns.
- Maintaining appropriate professional boundaries.
- Undertaking continuing professional development.
- Seeking appropriate professional supervision, consultation or specialist advice where required.
- Monitoring the quality and safety of services.
- Identifying and implementing opportunities for continuous improvement.

5. Clinical Governance

Balance & Bloom Occupational Therapy is committed to providing occupational therapy services that are:

- Safe.
- Person-centred.
- Strengths-based.
- Neuroaffirming.
- Trauma-informed.
- Respectful of individual values, preferences and goals.
- Culturally responsive.
- Evidence-informed.
- Within the practitioner's scope of practice.
- Consistent with professional and ethical obligations.
- Responsive to the individual circumstances and needs of each client.

Clinical decisions will be informed by appropriate assessment, professional reasoning, available evidence and relevant information obtained from the client and, where authorised, their family, carers, support network and other professionals.

Clinical governance will include consideration of:

- Client safety.
- Quality and effectiveness of assessment and intervention.
- Clinical reasoning and decision-making.
- Professional competence.
- Client experience and feedback.
- Clinical documentation.
- Risk management.
- Incident management.
- Complaints and feedback.
- Professional development.
- Evidence-informed practice.
- Continuous improvement.

The Occupational Therapy Board of Australia expects registered practitioners to practise safely and effectively, act ethically and place the care of clients as a primary professional responsibility.

6. Scope of Practice

Balance & Bloom Occupational Therapy will only provide services within the practitioner's education, training, experience, competence and professional scope.

The practitioner will consider whether they have the appropriate knowledge, skills and experience before undertaking a particular assessment, intervention, report or recommendation.

Where a client's needs fall outside the practitioner's scope or current competence, the practitioner will:

1. Identify the limitation.
2. Discuss the matter with the client and/or relevant decision-maker where appropriate.
3. Seek professional consultation or supervision where appropriate.
4. Refer the client to an appropriately qualified professional or service where required.
5. Document relevant clinical reasoning and actions.

The practitioner will not provide a service solely because it has been requested if doing so would fall outside their professional competence or create an unacceptable risk to the client.

7. Professional Development and Competence

The Practice Owner will maintain an appropriate program of continuing professional development relevant to current and anticipated areas of practice.

Professional development may include:

- Formal education and training.
- Workshops, seminars and conferences.
- Peer consultation.
- Professional reading.
- Evidence review and case reflection.
- Professional association activities.

8. Professional Consultation and Supervision

Although Balance & Bloom Occupational Therapy is a sole-practitioner practice, appropriate professional consultation and supervision will be sought when required.

This may occur where:

- A client presents with complex or unusual needs.
- Clinical reasoning is uncertain.
- A matter is outside or near the boundary of the practitioner's scope.
- There are significant safeguarding concerns.
- Ethical concerns arise.
- A significant incident occurs.
- Specialist knowledge is required.
- The practitioner identifies a need for additional support or professional reflection.

Consultation and supervision will be undertaken in a manner that protects client privacy and confidentiality.

10. Quality Management and Continuous Improvement

Balance & Bloom Occupational Therapy is committed to continuously reviewing and improving the quality and safety of its services.

Continuous improvement activities may include:

- Reviewing client feedback.
- Reviewing complaints.
- Undertaking clinical or documentation audits.
- Reviewing policies and procedures.
- Monitoring legislative and regulatory changes.
- Undertaking professional development.
- Seeking supervision or peer consultation.
- Identifying and implementing improvements to service delivery.

Where an issue or opportunity for improvement is identified, the practitioner will consider:

1. What occurred or what could be improved.
2. Why the issue occurred.
3. Whether there is a risk of recurrence.
4. What action should be taken.
5. Whether the action was effective.
6. Whether further changes are required.

11. Client Participation in Governance and Service Improvement

Balance & Bloom recognises that clients are an important source of information about the quality, accessibility and effectiveness of services.

Where appropriate, clients will be encouraged to provide feedback about:

- Their experience of services.
- Accessibility of services.
- Communication.
- Assessment and intervention.
- Reports and recommendations.
- Their goals and outcomes.
- Areas where the service could be improved.

Feedback may be provided verbally, in writing, through surveys or through the complaints and feedback process.

Client feedback will be considered as part of continuous improvement activities.

For NDIS participants, governance and quality systems will support participant rights, choice, control and opportunities to provide feedback about services. The NDIS Practice Standards specifically identify participant input into relevant organisational policies and processes as part of effective governance.

12. Policy and Procedure Management

Balance & Bloom Occupational Therapy will maintain policies and procedures that are relevant to the services provided.

Policies and procedures will be reviewed:

- At least annually.
- When legislation or regulatory requirements change.
- When professional standards or guidance change.
- Following a significant incident.
- Following a significant complaint.
- When a change to services or business operations occurs.

- When an identified risk indicates that a policy or procedure requires amendment.

Where changes are made, the updated policy will be implemented and relevant changes incorporated into practice.

13. Emergency and Business Continuity

Balance & Bloom Occupational Therapy will maintain arrangements to minimise disruption to essential services during emergencies or unexpected interruptions to business operations.

Potential disruptions may include:

- Severe weather.
- Natural disasters.
- Public health emergencies.
- Significant technology or telecommunications failures.
- Loss of access to premises.
- Practitioner illness or incapacity.
- Other circumstances that prevent normal service delivery.

Where services need to be changed, postponed or cancelled, clients will be informed as soon as reasonably practicable.

Where appropriate, alternative arrangements such as telehealth, rescheduling or referral to another service may be considered.

14. Insurance

Balance & Bloom Occupational Therapy will maintain insurance appropriate to the nature and scope of services provided.

This will include, as appropriate:

- Professional indemnity insurance.
- Public liability insurance.
- Other insurance required by legislation, contracts, funding bodies or the circumstances of the business.

Insurance arrangements will be reviewed periodically to ensure they remain appropriate to the services provided.

The NDIS Practice Standards identify appropriate insurance, including professional indemnity and public liability insurance, as part of provider risk management.

15. Documentation and Records

Governance and clinical governance activities will be documented where appropriate.

Records may include:

- Continuing professional development records.
- Supervision or professional consultation records.
- Risk assessments.
- Risk registers.
- Incident records.
- Complaint and feedback records.
- Continuous improvement records.
- Policy review records.
- Insurance documentation.
- Professional registration documentation.

- Clinical audit records.

Records will be maintained securely and in accordance with Balance & Bloom's Privacy & Confidentiality Policy and Information Management Policy.

16. Policy Review

This policy will be reviewed at least annually, or earlier where required due to legislative, regulatory, professional or operational changes.

Effective Date: 01/11/2026

Next Review Date: 01/11/2027

Privacy & Confidentiality Policy

1. Purpose

Balance & Bloom Occupational Therapy is committed to protecting the privacy and confidentiality of all personal and health information collected and managed in providing occupational therapy services.

The practice will comply with applicable privacy legislation, including the Privacy Act 1988 (Cth), Australian Privacy Principles and other applicable requirements.

2. Scope

This policy applies to all clients, participants, parents, guardians, carers, families, representatives and other individuals whose information is collected by Balance & Bloom Occupational Therapy.

3. Definitions

Personal Information: Information or an opinion about an identified or reasonably identifiable individual.

Sensitive Information: Personal information including health information and other categories recognised under privacy legislation.

Health Information: Information about an individual's health, disability, injury or healthcare services.

4. Collection

Information will only be collected where reasonably necessary for:

- Providing occupational therapy.
- Assessing needs.
- Developing recommendations.
- Communicating with relevant people.
- Coordinating services.
- Billing.
- Meeting legal requirements.
- Managing safety and risk.

Information may be collected through:

- Referral forms.
- Interviews.
- Assessments.
- Email.
- Telephone.
- Existing records.
- Other authorised sources.

5. Use and Disclosure

Information will only be used or disclosed for appropriate purposes, including:

- Providing services.
- Communicating with authorised people.
- Coordinating care.
- Preparing reports.
- Managing safety.
- Meeting legal obligations.

- Responding to complaints.
- Managing incidents.

Information will not be disclosed to third parties without appropriate consent unless disclosure is authorised or required by law.

6. Data Quality and Security

Balance & Bloom Occupational Therapy will take reasonable steps to ensure information is accurate, complete, current and secure.

Reasonable safeguards will be used to protect against loss, misuse, unauthorised access, disclosure and/or modification.

7. Data Breaches

Where a privacy breach occurs, Balance & Bloom will:

1. Identify and contain the breach.
2. Assess potential harm.
3. Take steps to prevent further disclosure.
4. Notify affected individuals where required.
5. Notify the OAIC where required under the Notifiable Data Breaches scheme.
6. Review and improve security controls.

8. Access and Correction

Individuals may request access to their personal information and request correction of inaccurate information. Requests will be managed in accordance with applicable privacy requirements.

9. Confidentiality

Information obtained through professional practice will remain confidential except where disclosure is:

- Authorised.
- Required by law.
- Necessary to prevent serious harm.
- Otherwise permitted under applicable legislation.

10. Complaints

Privacy concerns may be raised directly with Balance & Bloom Occupational Therapy.

Where appropriate, individuals may also contact the Office of the Australian Information Commissioner.

11. Disposal

Information will be securely destroyed or deleted when legally permitted and when retention requirements have been satisfied.

12. Policy Review

This policy will be reviewed at least annually, or earlier where required due to legislative, regulatory, professional or operational changes.

Effective Date: 01/11/2026

Next Review Date: 01/11/2027

Professional Conduct, Ethics & Conflicts of Interest Policy

1. Purpose

Balance & Bloom Occupational Therapy is committed to providing occupational therapy services in a professional, ethical, respectful and person-centred manner.

This policy outlines the professional and ethical standards expected in the provision of services and establishes a framework for identifying, disclosing and managing actual, potential or perceived conflicts of interest.

2. Scope

This policy applies to all occupational therapy services provided by Balance & Bloom Occupational Therapy and all interactions with clients, families, carers, advocates, support coordinators, plan managers, other professionals, suppliers and other stakeholders.

3. Definitions

Conflict of Interest:

A situation where personal, financial, professional or other interests could influence, or reasonably be perceived to influence, professional decision-making.

Dual Relationship:

A relationship in which the practitioner has more than one type of relationship with a client, such as both a professional and personal relationship.

Professional Boundaries:

The appropriate limits that maintain a safe, therapeutic and professional relationship between the practitioner and client.

4. Professional Conduct

Balance & Bloom Occupational Therapy will provide services consistent with professional obligations and the Occupational Therapy Board of Australia's Code of Conduct.

The practitioner will:

- Treat clients with dignity, respect and compassion.
- Act honestly and transparently.
- Place client wellbeing and safety at the centre of professional decision-making.
- Practise within scope and competence.
- Maintain appropriate professional boundaries.
- Respect client autonomy and choice.
- Protect privacy and confidentiality.
- Communicate openly and respectfully.
- Maintain accurate clinical records.
- Recognise and manage risks.
- Seek consultation where appropriate.
- Maintain professional competence through continuing professional development.

The Occupational Therapy Board's Code of Conduct identifies safe and effective practice, shared decision-making, professional competence, minimising risk and ethical professional behaviour as fundamental professional responsibilities.

5. Professional Boundaries

The practitioner will maintain appropriate boundaries with clients and their support networks.

This includes consideration of:

- Personal relationships.
- Social relationships.
- Communication outside agreed channels.
- Gifts.
- Financial relationships.
- Social media connections.
- Dual relationships.
- Personal disclosure.
- Physical contact.
- Relationships with family members or carers.

Where a boundary concern arises, the practitioner will consider whether the relationship could affect professional judgement, client safety or the therapeutic relationship.

6. Gifts and Benefits

Small, culturally appropriate or symbolic gifts may be accepted where refusal would cause significant offence or distress.

The practitioner will not accept gifts, financial benefits or other incentives that could reasonably influence professional judgement.

Significant or unusual gifts will be declined or, where appropriate, discussed with the client and documented.

7. Conflicts of Interest

Conflicts may arise through:

- Equipment suppliers.
- Financial relationships.
- Referral arrangements.
- Personal relationships.
- Family relationships.
- Other business interests.
- Gifts or incentives.
- Commercial arrangements.

Where a conflict exists, the practitioner will:

1. Identify the conflict.
2. Consider whether it could influence clinical decision-making.
3. Disclose it where appropriate.
4. Take steps to eliminate or manage it.
5. Prioritise the client's interests.
6. Document the management of the conflict where appropriate.

8. Equipment and Supplier Relationships

Clinical recommendations will be based on the client's assessed needs and not on financial incentives, commissions or preferred supplier arrangements.

Where more than one suitable option exists, client choice will be supported.

9. Social Media

Clients will not be identified or discussed on personal or professional social media without appropriate consent and consideration of privacy, confidentiality and professional obligations.

Professional social media activity will not create misleading expectations about treatment outcomes.

10. Policy Review

This policy will be reviewed at least annually, or earlier where required due to legislative, regulatory, professional or operational changes.

Effective Date: 01/11/2026

Next Review Date: 01/11/2027

Referral, Collaboration, Continuity & Discharge Policy

1. Purpose

Balance & Bloom Occupational Therapy recognises that effective occupational therapy may require collaboration with other professionals and services.

2. Referrals

Referrals may be accepted where:

- The service is within scope.
- Appropriate information is available.
- The practitioner has capacity.
- The client's needs can be safely addressed.

A referral may be declined where the service is outside scope or cannot be safely provided.

3. Collaboration

With appropriate consent, Balance & Bloom Occupational Therapy may collaborate with:

- GPs.
- Allied health professionals.
- Support coordinators.
- Plan managers.
- Schools.
- Early childhood services.
- Aged-care providers.
- Support workers.
- Family members.
- Carers.
- Other relevant services.

4. Information Sharing

Only information reasonably required for the purpose will be shared, subject to consent and applicable law.

5. Continuity

Where the practitioner is unavailable, reasonable steps will be taken to communicate relevant information and minimise disruption.

6. Discharge

A client may be discharged where:

- Goals have been achieved.
- Further OT is not clinically indicated.
- The client chooses to end services.
- The service is no longer appropriate.
- The client requires another service.
- Continued services cannot be safely provided. ,

7. Discharge Information

Where appropriate, discharge information may include:

- Services provided.
- Outcomes.
- Recommendations.
- Ongoing needs.
- Referrals.
- Follow-up recommendations.

8. Policy Review

This policy will be reviewed at least annually, or earlier where required due to legislative, regulatory, professional or operational changes.

Effective Date: 01/11/2026

Next Review Date: 01/11/2027

Restrictive Practices Policy

1. Purpose

Balance & Bloom Occupational Therapy is committed to protecting participants from abuse, neglect, exploitation, violence and inappropriate restrictive practices.

2. Scope

This policy applies to all services provided by Balance & Bloom Occupational Therapy.

3. Safeguarding

Balance & Bloom Occupational Therapy will:

- Respect participant rights.
- Promote choice and control.
- Identify safeguarding risks.
- Respond to concerns.
- Support advocacy.
- Report matters to appropriate authorities where required.

4. Restrictive Practices

Balance & Bloom does not implement regulated restrictive practices.

The practitioner will not:

- Use physical restraint as part of an intervention.
- Implement a restrictive practice contained in a behaviour support plan.
- Use environmental, mechanical, chemical or seclusion-based restrictive practices as part of an NDIS service.

The NDIS Commission states that providers implementing regulated restrictive practices must be registered.

5. Unauthorised Restrictive Practices

If the practitioner becomes aware that a restrictive practice is being used in relation to a participant, the practitioner will:

1. Consider immediate safety.
2. Not participate in or facilitate the restrictive practice.
3. Document relevant information.
4. Raise the concern with the appropriate people.
5. Consider whether external reporting is required.
6. Seek professional or regulatory advice where necessary.

The NDIS Commission specifically asks people to report situations where an unregistered NDIS provider is using restrictive practices.

6. Positive and Least Restrictive Approaches

Balance & Bloom Occupational Therapy will seek to support:

- Environmental modification.
- Communication alternatives.
- Sensory regulation.
- Functional alternatives.
- Skill development.

- Environmental supports.
- Person-centred strategies.

Interventions will aim to maximise autonomy and participation rather than restrict behaviour.

7. Safeguarding Concerns

Any concern regarding abuse, neglect, exploitation, violence or restrictive practices will be managed under the Safeguarding, Abuse, Neglect & Exploitation policy.

8. Policy Review

This policy will be reviewed at least annually, or earlier where required due to legislative, regulatory, professional or operational changes.

Effective Date: 01/11/2026

Next Review Date: 01/11/2027

Risk Management & Work Health and Safety Policy

1. Purpose

Balance & Bloom Occupational Therapy is committed to providing safe occupational therapy services and maintaining a work environment that protects the health, safety and wellbeing of the practitioner, clients, families, carers, visitors and other people who may be affected by the services provided.

This policy outlines our approach to identifying, assessing, managing and reviewing risks associated with the delivery of occupational therapy services.

As a sole-practitioner business, Balance & Bloom recognises its responsibility to identify and manage risks associated with clinical practice, home and community visits, manual handling, equipment, lone working, travel, environmental hazards, infection, emergencies and other aspects of service delivery.

2. Scope

This policy applies to all services and activities undertaken by Balance & Bloom Occupational Therapy, including, but not limited to:

- Occupational therapy assessments.
- Occupational therapy intervention.
- School and education settings.
- Community-based services.
- Telehealth services.
- Travel undertaken for work purposes.
- Administrative and business activities.

3. Definitions

Hazard:

A situation, object, activity or circumstance that has the potential to cause harm.

Risk:

The possibility that harm may occur when a person is exposed to a hazard.

Risk Assessment:

The process of considering the likelihood and potential consequences of a hazard causing harm.

Risk Control:

A measure implemented to eliminate or minimise an identified risk.

Reasonably Practicable:

What can reasonably be done to eliminate or minimise a health and safety risk, having regard to the likelihood and potential severity of harm, what is known about the hazard and available control measures, and the cost and suitability of those measures.

Lone Working:

Work undertaken where the practitioner is working without another person readily available to provide assistance in the event of an emergency or incident.

WHS:

Work Health and Safety.

4. Risk Management Approach

Balance & Bloom will use a systematic approach to managing health and safety risks.

Risk management will involve:

1. Identifying hazards.

2. Assessing risks where appropriate.
3. Implementing controls to eliminate or minimise risks.
4. Reviewing controls to ensure they remain effective.

Risks will be managed in a manner proportionate to the nature, complexity and circumstances of the service being provided.

Balance & Bloom will seek to eliminate risks where reasonably practicable. Where elimination is not reasonably practicable, risks will be minimised so far as is reasonably practicable. This reflects the approach outlined by Safe Work Australia and SafeWork NSW.

5. Identification of Hazards

Hazards may be identified through:

- Initial client and environmental assessment.
- Home and community visits.
- Clinical observation.
- Client or family feedback.
- Practitioner observations.
- Incident reports.
- Near misses.
- Complaints.
- Equipment assessment.
- Review of previous risks.
- Changes to a client's circumstances.
- Changes to the environment.
- Changes to the services being provided.
- Changes to legislation or professional guidance.

6. Risk Assessment

A formal written risk assessment will be completed where the risk is significant, complex, ongoing or requires documented controls.

Routine risks that are well understood and appropriately controlled may be managed through normal clinical and work practices.

7. Hierarchy of Controls

Where a risk is identified, Balance & Bloom will consider the hierarchy of controls.

Controls will be considered in the following order:

1. **Elimination** – remove the hazard entirely where reasonably practicable.
2. **Substitution** – replace the hazard with something safer.
3. **Isolation** – separate people from the hazard.
4. **Engineering controls** – physically control or modify the hazard.
5. **Administrative controls** – introduce procedures, systems, information or training.
6. **Personal protective equipment** – use appropriate PPE where required.

Administrative controls and PPE will not be relied upon where a more effective control is reasonably practicable.

The hierarchy of controls is recognised by Safe Work Australia as the preferred approach to selecting effective risk controls.

8. Client and Clinical Safety

Risk assessment will form part of clinical decision-making where there is a potential risk of harm to a client.

Particular consideration may be given to:

- Falls.
- Transfers.
- Mobility.
- Balance.
- Functional cognition.
- Impaired insight or judgement.
- Sensory impairment.
- Fatigue.
- Pain.
- Physical capacity.
- Environmental hazards.
- Equipment.
- Assistive technology.
- Manual handling.
- Carer or family capacity.
- Communication needs.
- Behavioural or emotional factors.
- Safeguarding concerns.

Where a proposed assessment or intervention presents an unacceptable risk, the practitioner may modify, postpone or cease the activity.

Where appropriate, the client and/or relevant support person will be informed of identified risks and recommended controls.

9. Home and Community Environments

Occupational therapy services may be provided in environments that are outside the practitioner's control.

Before and during home or community visits, the practitioner will consider relevant environmental and personal safety risks.

These may include:

- Safe access and exit.
- Stairs.
- Flooring.
- Lighting.
- Clutter.
- Pets.
- Smoking.
- Unsafe or unhygienic conditions.
- Presence of hazardous substances.
- Aggressive or threatening individuals.
- Other people in the environment.
- Infection risks.
- Manual handling requirements.
- Emergency access.

- Mobile phone reception.
- Weather conditions.
- Parking and travel conditions.

Where an environment presents an unacceptable risk, Balance & Bloom may:

- Request that the hazard be removed or controlled.
- Modify the assessment.
- Request another person be present.
- Relocate the appointment.
- Conduct part of the assessment via telehealth where appropriate.
- Postpone the appointment.
- Cease the visit.

The safety of the practitioner and client will take priority over completing an assessment or intervention.

10. Manual Handling

Balance & Bloom recognises that occupational therapy may involve observing, assessing or assisting with functional activities and transfers.

The practitioner will not undertake manual handling tasks that exceed their physical capacity, training or professional scope.

Where assistance from another person is required, the practitioner will not proceed until appropriate assistance is available.

The practitioner will not place themselves or a client at unnecessary risk in order to complete an assessment.

12. Lone Working

As a sole practitioner, Balance & Bloom recognises that services will involve working alone.

Where appropriate, the practitioner will:

- Maintain access to a charged mobile phone.
- Ensure relevant appointment details are recorded.
- Consider environmental and personal safety before entering an unfamiliar environment.
- Avoid entering an environment where there is a known and unacceptable risk.
- Maintain an appropriate method of communicating their location or expected return where required.
- Leave an unsafe environment immediately where necessary.
- Contact emergency services where required.

Higher-risk visits may require additional planning or alternative arrangements.

13. Violence, Aggression and Unsafe Behaviour

Balance & Bloom recognises that practitioners may encounter situations involving aggression, threatening behaviour or violence.

The practitioner will take reasonable steps to identify and manage foreseeable risks associated with:

- Verbal aggression.
- Threatening behaviour.
- Physical aggression.
- Intoxication.
- Unpredictable behaviour.

- Domestic or family violence situations.
- Unsafe individuals within a home or community environment.

The practitioner may terminate or withdraw from a service where they reasonably believe that continuing would create an unacceptable safety risk.

Emergency services will be contacted where immediate assistance is required.

Safe Work Australia identifies working alone and contact with members of the public as factors that may contribute to workplace violence and aggression risks.

14. Infection Prevention and Exposure Risks

Balance & Bloom will take reasonable precautions to minimise infection and exposure risks.

This will include:

- Appropriate hand hygiene.
- Use of appropriate PPE where required.
- Cleaning of equipment and frequently touched surfaces.
- Avoiding unnecessary contact with bodily fluids.
- Appropriate management of contaminated materials.
- Rescheduling appointments where illness presents an unacceptable risk.
- Following relevant public health guidance.

Unwell clients must reschedule their appointment or engage remotely if a viable option. If a client presents unwell, they risk the appointment being cancelled with fees applicable in accordance with the service agreement and/or fee policy.

15. Practitioner Health, Fatigue and Wellbeing

Balance & Bloom recognises that practitioner health and wellbeing can affect safe clinical practice.

The practitioner will monitor their own capacity to safely undertake work.

Where illness, fatigue, injury, stress or other circumstances may affect safe practice, consideration will be given to:

- Rescheduling appointments.
- Using telehealth where appropriate.
- Referring or postponing services where necessary.

The practitioner will not knowingly undertake clinical work when their capacity is significantly impaired and doing so would create an unacceptable risk to clients or themselves.

16. Travel and Driving

Where travel is required as part of service delivery, the practitioner will consider:

- Road and weather conditions.
- Fatigue.
- Vehicle safety.
- Parking and access.
- Travel time.
- Mobile phone availability.
- Location and accessibility of the destination.
- Risks associated with remote or isolated locations.

The practitioner will comply with applicable road laws and will not use a mobile phone while driving except where legally permitted.

Where travel conditions present an unacceptable risk, the appointment may be postponed, relocated or conducted via telehealth where appropriate.

17. Emergency Situations

Where an emergency occurs, the practitioner will prioritise immediate safety.

Depending on the circumstances, this may include:

1. Ceasing the activity.
2. Moving to a safe location.
3. Calling emergency services on **000**.
4. Providing appropriate assistance within the practitioner's training and scope.
5. Contacting the client's nominated emergency contact where appropriate.
6. Documenting the incident.
7. Completing any required follow-up.
8. Reviewing whether changes to risk controls are required.

18. Incident and Near-Miss Reporting

Hazards, incidents and near misses will be documented where appropriate.

An incident may include:

- Injury.
- Fall.
- Equipment failure.
- Unsafe transfer.
- Significant clinical error.
- Exposure to a hazard.
- Threatening behaviour.
- Privacy or information security incident.
- Safeguarding concern.
- Other event that causes or could have caused harm.

Near misses will also be considered as opportunities to identify and address risks before harm occurs.

Further requirements are outlined in the Incident Management Policy.

19. Review of Risk Controls

Risk controls will be reviewed:

- Following an incident or near miss.
- When circumstances change.
- When a new hazard is identified.
- When an intervention changes.
- When new equipment is introduced.
- When a client's functional circumstances change.
- When a control is found to be ineffective.
- Following relevant legislative or regulatory changes.

Safe Work Australia recommends reviewing control measures to ensure they remain effective and continue to manage the identified risks.

20. Documentation

Relevant risk management documentation may include:

- Client risk assessments.
- Home visit risk assessments.
- Risk registers.
- Environmental assessments.
- Incident reports.
- Near-miss records.
- Equipment risk assessments.
- Emergency records.
- Clinical documentation relating to identified risks.

Risk information relevant to a client's clinical care will be documented in their clinical record.

21. Policy Review

This policy will be reviewed at least annually, or earlier where required due to legislative, regulatory, professional or operational changes.

Effective Date: 01/11/2026

Next Review Date: 01/11/2027

Safeguarding, Abuse, Neglect & Exploitation Policy

1. Purpose

Balance & Bloom Occupational Therapy is committed to protecting children, people with disability and older people from abuse, neglect, exploitation, violence and other forms of harm.

2. Scope

This policy applies to all clients and services provided by Balance & Bloom Occupational Therapy.

3. Types of Harm

Potential harm may include:

- Physical abuse.
- Sexual abuse.
- Emotional or psychological abuse.
- Neglect.
- Financial abuse.
- Exploitation.
- Coercion.
- Domestic and family violence.
- Discrimination.
- Grooming.
- Unsafe or inappropriate restrictive practices.

4. Safeguarding Commitment

Balance & Bloom Occupational Therapy will:

- Treat people with dignity and respect.
- Promote choice and control.
- Take concerns seriously.
- Support people to communicate concerns.
- Respond promptly to identified risks.
- Maintain appropriate confidentiality.
- Make required reports.
- Support access to advocacy.
- Avoid victimisation of people who raise concerns.

The NDIS Commission identifies the right of people with disability to safety and freedom from abuse, exploitation and violence as a core protection.

5. Responding to a Disclosure

Where a client discloses harm, the practitioner will:

1. Listen calmly.
2. Take the concern seriously.
3. Avoid blaming or judging.
4. Avoid unnecessary questioning.
5. Explain that information may need to be shared to protect safety.
6. Record relevant information accurately.
7. Assess immediate safety.
8. Make required referrals or reports.

6. Immediate Danger

Where there is an immediate risk of serious harm, emergency services will be contacted by calling 000.

7. Children and Young People

Where concerns relate to a child or young person, Balance & Bloom Occupational Therapy will comply with applicable child protection and mandatory reporting requirements in the jurisdiction in which the service is provided.

8. NDIS Participants

Where a concern involves an NDIS participant, the practitioner will consider the requirements of the NDIS Code of Conduct and whether the matter should be raised with the NDIS Commission or another relevant authority.

9. Financial Exploitation

The practitioner will not:

- Borrow money from clients.
- Lend money to clients.
- Accept financial benefits that create a conflict of interest.

10. Policy Review

This policy will be reviewed at least annually, or earlier where required due to legislative, regulatory, professional or operational changes.

Effective Date: 01/11/2026

Next Review Date: 01/11/2027