

CLIENT INTAKE & ASSESSMENT POLICY

Practice: Amrita Sinha Occupational Therapy Pty Ltd

Version: 1.0

Review Date: February 16, 2026

Approved By: Practice Director

Purpose

To ensure a consistent, ethical, and compliant process for intake, eligibility screening, informed consent, and occupational therapy assessment.

Scope

Applies to all practitioners engaged by ASOT.

Policy Statement

All clients must undergo a structured intake process prior to service commencement. Assessments must be conducted within scope of practice and documented contemporaneously.

Procedure

1. Referral & Initial Enquiry

- Record referral source
- Confirm funding source
- Identify presenting concerns
- Screen for conflict of interest

2. Eligibility & Scope

- Confirm service alignment with ASOT service areas
- Confirm practitioner competence

3. Informed Consent

- Obtain written consent prior to assessment
- Explain:
 - Purpose of service
 - Confidentiality limits
 - Fees
 - Complaint pathway
 - Telehealth risks (if applicable)

4. Assessment Process

- Use appropriate standardized and/or functional tools
- Document clinical reasoning
- Maintain objective and professional language

5. Documentation

- Complete notes within 24–48 hours
- Store securely in approved system