

## **Onboarding Document for Volunteers**

Forge Clarity PTY LTD

Remote Telehealth Counselling & Therapeutic Supports Practice

### **1. Welcome and Introduction**

#### **1.1 Welcome to Forge Clarity**

We are grateful for your commitment to supporting individuals through grief and loss. As a volunteer facilitator for our free Thursday evening Zoom Grief Support Group, you play a vital role in creating a safe, supportive space for participants to share their experiences and find community.

This Onboarding document contains some of the essential information, policies, and procedures you need to know as a Forge Clarity volunteer. Please read it carefully and retain it for future reference. We remind you here that within the Volunteer Waiver, and in this document, Forge Clarity notifies you that in volunteering you agree that you are up to date with all relevant policies and procedures etc that can be located via <https://forgeclarity.com.au/documents>

### 1.2 Purpose of This Document

This document serves as your comprehensive guide to:

- Understanding your role and responsibilities
- Knowing what you can and cannot access
- Following proper emergency procedures
- Reporting incidents appropriately
- Maintaining confidentiality and privacy
- Understanding your rights and protections

### 1.3 Acknowledgment Requirement

By accepting your volunteer role, you acknowledge that you have:

- Read and understood this entire document
- Read and signed the Liability Waiver for Volunteers
- Agreed to comply with all policies and procedures outlined herein
- Understood the limitations of your access to client information
- Committed to maintaining confidentiality at all times

## 2. About Forge Clarity

### 2.1 Our Organisation

Business Name: Forge Clarity PTY LTD

ABN: 12 685 199 124

Director/Lead Therapist: Tegan Elza Banks

Service Model: Remote telehealth counselling and therapeutic supports

### 2.2 Services We Provide

Forge Clarity provides:

1. Individual Therapy (Director only): One-on-one counselling and psychotherapy for NDIS participants and private clients
2. NDIS Therapeutic Supports (Director only): Specialised support for NDIS participants
3. Free Grief Support Group (Volunteers assist): Weekly Thursday 7:00-8:00 PM Zoom sessions open to the public

Note: If a client wishes to see you directly one on one that is between you and them. Forge Clarity is not party, responsible or liable to any of other individuals' practices or policies etc.

## 2.3 Professional Standards

Forge Clarity complies with:

- NDIS Practice Standards (Module 1, 2 & 3: Therapeutic Supports)
- NDIS Code of Conduct
- Australian Counselling Association (ACA) Code of Ethics
- Psychotherapy and Counselling Federation of Australia (PACFA) standards
- Privacy Act 1988 (Cth)
- Health Records and Information Privacy Act 2002 (NSW)
- All relevant Australian legislation

## 2.4 Our Values

- Person-centered care: Every individual's dignity, autonomy, and choice
- Trauma-informed practice: Understanding the impact of trauma
- Confidentiality: Protecting privacy at all times
- Safety: Creating safe spaces for healing
- Continuous improvement: Learning from experiences

## 3. Volunteer Role Overview

### 3.1 Your Specific Role

As a Forge Clarity volunteer, your role is to:

Co-facilitate the Free Thursday Evening Grief Support Group

- Time: 7:00 PM - 8:00 PM AEST
- Platform: Zoom
- Frequency: Weekly (with rotation schedule - volunteers contribute their time once a month)
- Format: Open grief support group

### 3.2 Your Responsibilities

You are responsible for:

**1. Facilitation:**

- Co-facilitating group discussions with another volunteer or the Director
- Creating a welcoming, safe environment for participants
- Following group guidelines and structure
- Managing time appropriately

**2. Documentation:**

- Taking notes during sessions using ONLY Zoom display names or participant codes/ what participant nominates via text, chat, or vocally
- Recording general themes and topics discussed (no identifying details)
- Noting attendance count (numbers only, no names)
- Documenting any resources shared

**3. Risk Management:**

- Identifying participants who may be in distress or crisis
- Reporting any risk concerns to the Director IMMEDIATELY
- Following emergency procedures when needed

**4. Professionalism:**

- Arriving on time for sessions
- Maintaining appropriate boundaries
- Treating all participants with respect and dignity
- Adhering to the PACFA or ACA Code of Ethics

**5. Communication:**

- Attending monthly debrief sessions with the Director
- Communicating any concerns or questions promptly
- Notifying the Director if you cannot attend a scheduled session

**3.3 What You Do NOT Do**

As a volunteer, you do NOT:

- Provide individual therapy or counseling while volunteering with Forge Clarity
- Make diagnoses or treatment recommendations
- Access individual client records or files
- Know client codes or identifying information (beyond what participants voluntarily share)
- Handle billing, invoicing, or NDIS claims
- Make decisions about service provision
- Contact participants outside of group sessions
- Have any administrative access to Forge Clarity systems

**3.4 Rotation Schedule**

Volunteers facilitate on a rotating basis (typically once per month) to:

- Provide additional confidentiality protection for participants

- Prevent volunteer burnout
- Ensure fresh perspectives
- Allow volunteers to attend sessions as participants when not facilitating

## 4. Legal and Regulatory Framework

### 4.1 Applicable Laws and Standards

Your volunteer work is governed by:

Federal Legislation:

- Privacy Act 1988 (Cth)
- NDIS Act 2013 (Cth)
- Corporations Act 2001 (Cth) - Whistleblower protections
- Work Health and Safety Act 2011 (Cth)

NSW Legislation:

- Civil Liability Act 2002 (NSW) - Section 5Q (Volunteer liability protections)
- Health Records and Information Privacy Act 2002 (NSW)
- Children and Young Persons (Care and Protection) Act 1998 (NSW)
- Surveillance Devices Act 2007 (NSW)

Professional Standards:

- NDIS Code of Conduct
- NDIS Practice Standards (where applicable)
- ACA/PACFA Code of Ethics
- Professional conduct standards for mental health practitioners

### 4.2 Your Legal Protections

As a volunteer acting in good faith, you are protected under Section 5Q of the Civil Liability Act 2002 (NSW):

- Limited liability for acts or omissions done in good faith
- Protection when performing community work
- Coverage under organizational insurance (where applicable)

Important: These protections apply when you:

- Act in good faith and within your scope
- Follow policies and procedures
- Do not engage in intentional misconduct or gross negligence
- Operate under the direction and supervision of Forge Clarity

### 4.3 Mandatory Reporting Obligations

As a volunteer facilitator, you are a mandatory reporter in certain circumstances:

You MUST report:

1. Child Abuse/Neglect (NSW Children and Young Persons Act)
  - Report to: Child Protection Helpline (NSW): 132 111
  - Timeframe: As soon as practicable (within 24 hours)
2. Risk of Serious Harm to Self or Others
  - Report to: Emergency Services 000/112 AND Director immediately
  - Timeframe: Immediately
3. Vulnerable Adult Abuse
  - Report to: NDIS Commission (1800 035 544) AND Director
  - Timeframe: Within 24 hours

How to Report:

1. Take immediate action to ensure safety
2. Contact emergency services if needed (000/112)
3. Notify Director/Lead Therapist immediately
4. Document what you observed/heard
5. Complete incident report form
6. The Director will coordinate formal reporting

#### 4.4 Insurance Coverage

Forge Clarity maintains:

- Professional Indemnity Insurance covering volunteers
- Public Liability Insurance

Your Responsibility:

- Maintain your own current professional indemnity insurance
- Confirm your insurance covers volunteer work
- Provide proof of current insurance to Director annually

#### 4.5 Registration Requirement

Eligibility Requirements for Volunteers:

- Copy of current ACA/PACFA registration
- Your registration number and expiry date
- Copy of your current professional indemnity insurance certificate
- Confirmation that your insurance covers volunteer work

### 5. Access Limitations and Boundaries

#### 5.1 What You CAN Access

As a volunteer, you have access to:

1. During Group Sessions:
  - Zoom display names chosen by participants
  - General information participants voluntarily share in the group
  - Group guidelines and structure
  - Resources to share with participants
2. Documentation:
  - Blank "Grief Group Weekly Client Notes Template"
  - General group resources and handouts
  - Emergency contact information (Director's contact: 0450205370)
3. Support:
  - Monthly supervision/debrief with Director
  - Training materials and resources
  - Volunteer policies and procedures

## 5.2 What You CANNOT Access

As a volunteer, you do NOT have access to:

1. Client Information:
  - Client legal names (unless voluntarily shared in group)
  - Client codes used in the digital ledger
  - Individual client files or records
  - Physical Client Ledger (stored in locked cabinet)
  - Digital Client Ledger (only the Director/Lead Therapist has access)
  - Client Liability Waiver & Agreement forms
  - Any individual client contact information
  - NDIS participant numbers
  - Emergency contact information for participants
2. Systems and Records:
  - Digital Client Ledger
  - Forge Clarity email system
  - Google Workspace files (except shared volunteer resources)
  - Financial records or invoicing systems
  - NDIS portal or claims system
  - Session notes from individual therapy
3. Decision-Making:
  - Service provision decisions
  - Billing or payment decisions
  - Clinical decisions about participants
  - Policy changes or updates

## 5.3 De-Identification System

Critical Understanding:

Forge Clarity uses a strict de-identification system:

- Each client receiving individual services has a unique code (e.g., 0001, 0002)
- Legal names are stored ONLY in the Physical Client Ledger (locked cabinet)
- Only the Director has access to the ledger linking codes to names
- Volunteers use ONLY Zoom display names in documentation
- This protects participant confidentiality even if systems are breached

Your Role:

- Document using Zoom display names ONLY
- Never attempt to identify participants outside of sessions
- Never ask participants for identifying information beyond what they volunteer
- If a participant shares their full name, do not record it in notes

#### 5.4 Boundaries with Participants

Maintain Professional Boundaries:

 DO:

- Treat all participants with respect and dignity
- Maintain professional demeanor during sessions
- Refer participants to appropriate resources
- Report concerns to the Director

 DO NOT:

- Contact participants outside of group sessions while volunteering with Forge Clarity
- Provide individual therapy or counselling while volunteering with Forge Clarity
- Exchange personal contact information while volunteering with Forge Clarity
- Develop dual relationships (social, business, romantic) while volunteering with Forge Clarity
- Make promises about outcomes or services while volunteering with Forge Clarity
- Share your own detailed personal struggles (brief appropriate self-disclosure okay) while volunteering with Forge Clarity

If a Participant Contacts You Outside Sessions:

1. Do not respond with personal advice
2. Refer them back to the group or to the Director
3. Inform the Director of the contact
4. Maintain professional boundaries

### 6. Confidentiality and Privacy Requirements

#### 6.1 Confidentiality Commitment

As a volunteer, you agree to:

Maintain Strict Confidentiality:

- All participant information shared during sessions is CONFIDENTIAL

- You will not disclose any identifying information or personal stories
- You will not discuss participants with anyone except the Director (when necessary)
- Confidentiality continues after you cease volunteering

Security Protocols:

- Use password-protected Zoom meetings
- Ensure you are in a private location during sessions
- Secure any notes or materials appropriately
- Follow all organizational security protocols

Reporting Requirements:

- Report any privacy breaches immediately to the Director
- Document any suspected breaches
- Cooperate with investigations

## 6.2 Privacy Laws

You must comply with:

- Privacy Act 1988 (Cth) - Australian Privacy Principles
- Health Records and Information Privacy Act 2002 (NSW)

Key Privacy Principles:

1. Collection: Only collect information necessary for your role
2. Use: Use information only for the purpose collected
3. Disclosure: Do not disclose without consent (except mandatory reporting)
4. Security: Protect information from unauthorized access
5. Access: Respect participants' rights to their information

## 6.3 What You Can Share

With the Director:

- Risk concerns about participants
- Group dynamics that need attention
- Questions about facilitation
- Incident reports

With Other Volunteers:

- General facilitation strategies
- Resources for the group
- Scheduling and logistics
- De-identified learning experiences

With NO ONE:

- Specific participant stories or details
- Names or identifying information
- Personal health information

- Anything that could identify a participant

#### 6.4 Exceptions to Confidentiality

Confidentiality must be broken ONLY when:

1. Mandatory Reporting Required:

- Child abuse/neglect
- Risk of serious harm to self or others
- Vulnerable adult abuse

2. Legal Obligation:

- Court order or subpoena
- Required by law

3. Prevention of Serious Harm:

- Imminent risk to participant or others
- Emergency situations

Process:

- Inform the Director immediately
- Document thoroughly
- Follow emergency procedures
- The Director will coordinate formal reporting

#### 6.5 Privacy Breaches

If You Suspect a Privacy Breach:

1. Immediately:

- Stop any further disclosure
- Contain the breach if possible
- Notify the Director within 2 hours

2. Document:

- What information was disclosed
- To whom
- How it occurred
- When you became aware

3. Cooperate:

- With the Director's investigation
- With remediation efforts
- With any required notifications

Potential Privacy Breaches Include:

- Discussing participants outside appropriate contexts
- Leaving notes or materials where others can see them
- Accidentally sharing screen with identifying information
- Email sent to wrong recipient
- Zoom meeting not secured

## 6.6 Secure Storage and Destruction

During Your Volunteer Service:

- Store any materials in a secure, locked location
- Never leave materials in vehicles or public spaces
- Do not email sensitive information without encryption
- Password-protect any electronic files

After Group Sessions:

- Provide notes to the Director within 24 hours
- Do not retain copies of notes
- Securely destroy any draft notes (cross-cut shred)
- Delete any electronic drafts after transferring to Director

## 7. Emergency Response Procedures

### 7.1 Overview of Emergency Situations

An emergency exists when:

- A participant expresses active suicidal ideation with plan/means
- A participant makes homicidal threats toward specific person(s)
- A participant discloses child/elder abuse or neglect
- A participant is in immediate danger (DV, assault, medical emergency)
- A participant becomes unresponsive or appears to be in crisis

### 7.2 Immediate Response Protocol

#### STEP 1: Assess Risk Level

Ask direct, calm questions:

- "Are you currently thinking about acting on these feelings?"
- "Do you have a specific plan or means to harm yourself/others?"
- "Are you in immediate danger right now?"

#### STEP 2: If Risk is Imminent

##### 2A. If Participant's Location is Known:

- Call 000 (or 112 for international)

- Provide: name, address, nature of threat
- Stay on line with emergency services
- Keep participant on Zoom if possible

2B. If Location is Unknown:

- Keep participant engaged on Zoom
- Contact Tegan Elza Banks (Director) immediately
- Ask participant: "Can you share your location so we can get you help?"
- Ask for emergency contact number if they provided one

STEP 3: Do Not Leave the Participant Alone

- Move participant to private breakout room if possible
- Maintain contact while coordinating help
- If participant disconnects, contact their emergency contact (if available to Director)
- Director will access registration records for contact information

STEP 4: Contact the Director

- Call/text Director immediately: [Phone number provided during orientation]
- Provide: participant Zoom name, situation summary, actions taken
- Follow Director's instructions

### 7.3 Mandatory Reporting Procedures

Child/Elder Abuse Disclosure:

1. Listen and Document:

- Listen without interrogating
- Note what was said (use participant's words)
- Do not promise confidentiality
- Explain: "I care about your/their safety, and I need to report this"

2. Report Immediately:

- NSW Child Protection Helpline: 132 111
- Notify Director immediately
- Complete incident report within 24 hours

3. Provide Information:

- What was disclosed
- Any details about the child/elder
- Current location/safety
- Your contact information

Duty to Warn (Threat to Specific Person):

1. Assess Immediacy:

- Is threat specific and credible?
- Does person have means and intent?
- Is intended victim identifiable?

## 2. Take Action:

- Notify Director immediately
- Call Police: 000/112
- If safe to do so, warn intended victim
- Document thoroughly

### 7.4 Crisis Script for Facilitators

If a participant becomes distressed, use this script:

> "I'm hearing that you're in a lot of pain right now. Your safety is our priority. Can I connect you with someone who can help?"

> "I'd like to move you to a private breakout room so we can talk one-on-one while we figure out next steps."

#### De-escalation Strategies:

- Speak calmly and slowly
- Validate their feelings: "I hear that you're struggling"
- Ask what they need: "What would be most helpful right now?"
- Offer to stay with them: "You don't have to be alone right now"
- Provide crisis resources (see Section 7.6)

### 7.5 Post-Crisis Protocol

#### Immediately After:

1. Ensure participant is safe and connected to help
2. Document the incident using Incident Report Form
3. Debrief with Director (within 24 hours)
4. Care for your own wellbeing

#### Documentation Must Include:

- Date, time, participant Zoom name
- What was said (verbatim quotes)
- Actions taken (emergency services called, etc.)
- Who was notified
- Outcome/current status
- Your name and signature

#### Group Debrief (if appropriate):

- If incident occurred in main group (not breakout room)
- Address briefly at next session without details:
  - > "Last week, we had a situation where someone needed urgent support. Let's take a moment to reflect on how we can care for ourselves and each other."
- Do NOT violate confidentiality
- Reinforce safety and boundaries

## 7.6 Emergency Contact Toolkit

### Emergency Services:

- Emergency (Police/Ambulance/Fire): 000
- International Emergency: 112

### Crisis Support Services:

- Lifeline (Call): 13 11 14
- Lifeline (Text): 0477 13 11 14

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