Therapeutic Summaries and Observation Policy

Balanced Perceptions Therapy & Consulting

Effective 15 October 2026

This policy explains the written therapeutic documents BPTC may provide, the limits of those documents, the information and consent required, and the professional fees that apply. BPTC only undertakes this work when it is clinically appropriate, ethically permissible and within the treating therapist's professional role.

Documents prepared under this policy are therapeutic and factual in nature. They are not forensic assessments, expert reports or independent opinions, and must not be presented or relied upon as such.

1 Scope and professional limits

This policy applies to requests from clients, solicitors, employers, courts, tribunals, Child Protection and other agencies for attendance confirmation, therapeutic summaries, observation letters, case-note synopses or related correspondence.

BPTC may confirm or summarise information arising directly from the therapeutic relationship, including attendance, reported therapeutic goals, the general focus of sessions, observable engagement and documented progress. BPTC does not determine:

- legal facts or disputed events
- the credibility or truthfulness of any person
- parenting capacity or court-related risk
- diagnoses or opinions outside the therapist's qualifications and assessment
- whether a legal threshold has been met

BPTC may decline or narrow any request that falls outside the therapeutic role, creates an ethical conflict, risks harm, would be misleading, or cannot be completed responsibly from the available clinical record.

2 Available documents and fees

Document	Usual content	Fee
Attendance confirmation or brief summary	Attendance dates, number of sessions and limited factual information agreed within scope.	$250 per hour plus GST Usually 1 to 1.5 hours Estimated $275 to $412.50 including GST
Therapeutic observation letter	Concise factual summary of attendance, therapeutic focus and observable engagement.	$990 including GST
Comprehensive therapeutic notes synopsis	Structured synthesis of relevant clinical notes, usually for clients with about 10 or more sessions.	$3,300 to $5,500 including GST

The final scope, timeframe and fee depend on the request, the volume and complexity of the record, the number of participants and any required liaison or legal review. BPTC will confirm the scope and quote before substantial work begins.

3 Consent access and disclosure

Voluntary disclosure to a third party generally requires a valid written Release of Information that identifies the recipient, purpose and information authorised for release. BPTC will verify the identity and authority of the person making the request before releasing health information.

Couples and family records may contain health information about more than one person. Any request involving those records will be assessed individually, and consent from all relevant participants may be required unless disclosure is required or authorised by law.

Clients have a general right to request access to personal and health information held about them. Requests for case notes are assessed under applicable privacy and health-records law. Depending on the circumstances, access may be provided in full, in a redacted form, by synopsis, through an agreed intermediary, or refused where the law permits. A synopsis is not automatically substituted for access where the client has a legal right to the underlying information.

Unless otherwise agreed or legally required, completed documents are sent directly to the authorised recipient using a reasonably secure method.

4 Process payment and timing

- Work starts only after BPTC has accepted the request, confirmed the scope, received any required consent or lawful authority, and received cleared prepayment.
- The standard completion target is 7 to 10 business days after all required information and payment have been received. Complex matters may take longer.
- Urgent work is subject to clinical capacity and may attract an additional priority fee disclosed and agreed before work begins.
- If the scope expands or additional records, correspondence or revisions are requested, further fees may apply.
- Fees for work already performed are non-refundable, subject to the Australian Consumer Law.

5 Subpoenas and compelled disclosure

Consent is not always required where disclosure is compelled or authorised by law. If BPTC receives a subpoena, court order or other lawful demand, it will review the request and disclose only information that is legally required or permitted. Review, collation, redaction, correspondence, legal liaison and attendance are charged under the Court Attendance and Subpoena Policy.

6 Ethical and legal framework

BPTC handles these requests in accordance with applicable professional and legal obligations, including the AASW Code of Ethics, the Privacy Act 1988 (Cth), the Australian Privacy Principles, the Health Records Act 2001 (Vic) and other relevant legislation. Nothing in this policy removes a client's statutory rights or overrides a subpoena, court order or other legal requirement.

Balanced Perceptions Therapy & Consulting
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