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Managing staff through change & transitions: Practical HR tips for OT practice owners



When managing staff in an occupational therapy practice, it's important to apply fairness and clear communication to workforce challenges such as managing probation, navigating NDIS-driven change, and making decisions about workforce requirements.

Managing the probationary period

The first three to six months of employment should not be a passive "wait and see" period. Probation is an active opportunity for both parties to assess whether the arrangement is the right fit. From day one, best practice includes:

- Setting clear expectations, KPIs and supervision arrangements
- Providing structured induction and access to policies
- Scheduling regular check-ins (not just a six-month review)
- Addressing issues early and documenting discussions

Performance or capability concerns should never come as a surprise to the employee. Even during probation, employees are entitled to a fair process. Ending employment without raising concerns, providing feedback or offering support can expose employers to risk.

Procedural fairness

Procedural fairness is the consistent, respectful and transparent way workplace issues should be handled, and it's what regulators and tribunals expect if decisions are challenged. Key elements include:

- Responding to concerns promptly
- Investigating issues objectively and confidentially
- Explaining concerns and allowing employees to respond
- Allowing a support person in formal meetings
- Making decisions based on evidence

Procedural fairness applies to managing probation, performance, investigations, disciplinary decisions and terminations.

Managing change

NDIS pricing pressures, labour costs and shifting service models mean many OT practices are dealing with constant change. Practice owners may need to consider options for role redesign, reduced hours or redundancies, to ensure the business remains viable.

Change should not be rushed. Employers have consultation obligations under workplace laws and modern awards, even in small teams. This includes:

- Explaining the proposed change and reasons
- Genuinely considering employee feedback
- Documenting decisions and timeframes

Poorly managed change is also a psychosocial hazard. Uncertainty and lack of communication can erode trust and affect staff wellbeing.

When employment needs to end, whether due to performance, capacity or redundancy, the process matters as much as the outcome. For practice owners, especially those managing HR alongside clinical work, seeking advice early can help prevent costly mistakes.

Following your workplace policies

Up-to-date HR policies and procedures provide practice owners with consistent, structured guidance on managing staff through change. Review your HR protocols regularly to ensure they include legally sound guidance, including clear expectations, fair processes and timely actions to support your team and protect your practice.

For support with HR policies and procedures, practice management and workplace relations matters, you can reach out to the experienced team of HR professionals at WorkPlacePLUS.

OTA members receive special member benefits through WorkPlacePLUS for support with HR and IR issues. For more information, contact Anna on (03) 9492 0958 or visit www.WorkPlacePLUS.com.au