

Outline

The Changing Landscape of Mental Health Today

- Keeping Up with Technology & Professional Liability Concerns
- Client Expectations – Are You Ethically and Legally Up to the Challenge?

Social Media and Online Advertising Ethical Challenges – (Facebook, Instagram, Twitter, LinkedIn, and More!)

- Pros and Cons of Utilizing Social Media and Website In Your Practice
- Confidentiality and Privacy Issues (and How to Avoid Them)
- Boundary Issues – And How to Ethically Safeguard Yourself
- Advertising and Solicitation – Avoiding Ethical Pitfalls
- Creating Your Social Media Policies and Procedures

Email & Texting – The Legal Landmines of Electronic Communication

- Pros and Cons of Emailing and Texting With Clients
- Confidentiality/Inadvertent Disclosures - Legal Concerns
- Privacy Expectations of the Client and Maintaining Healthy Boundaries
- Creating Your Texting and Emailing Policies and Procedures

Objectives

1. Establish how to maintain ethical standards and compliance while utilizing social media technology.
2. Consider the legal and ethical challenges posed by communicating via email and text for mental health professionals.
3. Specify the threats that technology poses to the confidentiality and privacy of clients.
4. Explain the legal aspects of HIPAA and how to safeguard against violations of laws.
5. Discuss the ethical and legal issues that are unique to distance therapy and how to stay compliant.
6. Explore the ethical boundary challenges that arise when using technology.

Target Audience

Counselors • Social Workers • Marriage & Family Therapists • Psychologists • Psychiatrists  
Case Managers • Addiction Counselors • Therapists • Nurses • Other Mental Health Professionals

Telehealth - Avoiding Legal & Ethical Pitfalls

- Confidentiality/Privacy Concerns of Video Technology
- Practicing Across State Lines – Legal Issues and Insurance Challenges
- Client Expectations for Distance Therapy
- Creating Your Tele-Health Policies and Procedures

Electronic Records & Going Paperless – Top Mistakes to Avoid

- HIPAA – Electronic Records Legalities
- File Retention, Destruction and Security
- Cloud-Based Data – How, When and Why
- Paperless Office Software

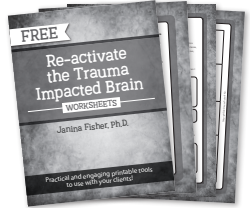
What the Future Holds

- New Technology & What to Expect Next!
- Legal & Ethical Trends

Live Seminar Schedule

- 7:30 Registration/Morning Coffee & Tea
  - 8:00 Program begins
  - 11:50 - 1:00 Lunch (on your own)
  - 4:00 Program ends
- There will be two 15-min breaks (mid-morning & mid-afternoon).  
Actual lunch and break start times are at the discretion of the speaker.  
A more detailed schedule is available upon request.

— FREE —  
Worksheets  
& Video  
To Help The Traumatized Brain



www.pesi.com/traumabrainws

Bring any Training On-Site!

- Cost Effective for Groups
- Customizable
- Flexible

CE credits included!

www.pesi.com/inhouse

NON-PROFIT ORG  
US POSTAGE PAID  
EAU CLAIRE WI  
PERMIT NO 32729

PESI, Inc.  
P.O. Box 1000  
Eau Claire, WI 54702-1000  
A division of PESI, Inc.

— A Complete Guide to —  
Ethical & Legal  
Technology  
Challenges  
for Mental Health Professionals!

Featuring **Melissa Westendorf, JD, Ph.D.**  
Attorney, Psychologist & Technology Wellness Expert

<b>Appleton, WI</b> Tuesday December 3, 2019	<b>Wauwatosa, WI</b> Friday December 6, 2019	<b>Madison, WI</b> Wednesday December 11, 2019
--	--	--



Register Now! [pesi.com/express/75532](http://pesi.com/express/75532)

— A Complete Guide to —  
Ethical & Legal  
Technology  
Challenges  
for Mental Health Professionals!

Featuring **Melissa Westendorf, JD, Ph.D.**  
Attorney, Psychologist & Technology Wellness Expert

A Mental Health Professional's  
Essential Guide for:

- Social Media
- Email & Texting
- Telehealth
- Online Advertising
- Going Paperless & Electronic Records

**Appleton, WI**  
Tuesday, December 3, 2019

**Wauwatosa, WI**  
Friday, December 6, 2019

**Madison, WI**  
Wednesday, December 11, 2019

6.25  
Hours of  
Ethics



Register Now! [pesi.com/express/75532](http://pesi.com/express/75532)

A NON-PROFIT ORGANIZATION CONNECTING KNOWLEDGE WITH NEED SINCE 1979



# A Complete Guide to ETHICAL & LEGAL TECHNOLOGY CHALLENGES for Mental Health Professionals!

The challenges you face are clear...If you are going to be successful in your practice, you need to adapt to your clients' growing expectations of your technological competence. The problem is, technology is the most likely way you'll get caught up in a legal and ethical nightmare!

**Technology is changing fast. How can you keep up while protecting your professional liability and personal reputation?**

Join technology wellness expert Dr. Melissa Westendorf for this essential and must-see seminar. As a psychologist, attorney and technology wellness expert, Dr. Westendorf is uniquely suited to handle the toughest questions about the legal and ethical challenges in technology today!

At this seminar, you'll learn:

- Strategies to effectively use social media while navigating the numerous ethical challenges it poses
- How to avoid the serious legal landmines that are associated with email and text
- Best practices for your website and online advertising to attract customers and stay ethical
- How to have an effective distance therapy practice that is legally and ethically compliant
- Top legal mistakes to avoid with electronic record keeping

**Sign up today! This is one seminar that no mental health professional can afford to miss!**

## Speaker

**Melissa Westendorf, J.D., Ph.D.,** is a clinical and forensic psychologist and founder of the Technology Wellness Center. As a clinician she has provided therapy to adults and adolescents in the community and within the correctional setting. Dr. Westendorf's forensic practice is dedicated to assessing adults and youth in either the criminal justice system or in civil matters. As a technology wellness expert, she is dedicated to assisting parents, children, adolescents, and adults on understanding the complexities of technology use and the impact on our brains, emotions, and interpersonal relationships. Dr. Westendorf's legal training coupled with her clinical background enables her to work with individuals who are experiencing the legal ramifications of technology use.

As a proactive psychologist and educator, Dr. Westendorf is a keynote speaker at academic institutions, parent organizations, businesses and community groups, offering preventative tools and resources that educate others on how to manage technology use in a healthy manner. She is the co-author of *Unplug! Raising Kids in a Technology Addicted World*. She has served on the Committee for Legal Issues for the American Psychological Association and on the Psychology Examining Board for the State of Wisconsin. Dr. Westendorf has been appointed as an expert in high profile legal cases, featuring the psychological ramifications of technology use. Her expertise has been relied upon in a wide variety of articles, podcasts, radio segments, and television programming. She has been featured on NPR (National Public Radio), Wisconsin Public Radio, and ABC's *20/20*. She is a monthly contributor to The Morning Blend.

#### Speaker Disclosures:

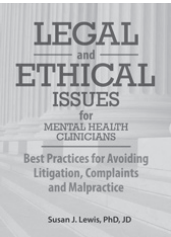
Financial: Melissa Westendorf is a founder of the Technology Wellness Center. She is in private practice. Dr. Westendorf receives a speaking honorarium from PESI, Inc.

Non-financial: Melissa Westendorf is a member of the American Psychological Association.



PESI Inc. is proud to offer this seminar (at these locations only) **free of charge** (on live seminar tuition) for veterans and active duty military personnel. **Limited seats available; advance online registration required.**

SAVE BY INCLUDING THESE PRODUCTS WITH SEMINAR REGISTRATION!



**Legal and Ethical Issues for Mental Health Clinicians:**  
*Best Practices for Avoiding Litigation, Complaints and Malpractice*

By Susan J. Lewis, Ph.D., J.D.

Guidance, strategies, solutions and up-to-date information to help keep you out of court and jail. Easy-to-understand language to step you through the legalese, highlighted by 30 engaging case examples to illustrate how you can overcome legal and ethical challenges, including risk management, contracts, HIPPA privileged communication, licensing complaints, supervision pitfalls, rights of minors and technology.

**RETHiNK Card Deck Mindful Conversation Starters**  
*56 Questions to Encourage Compassion, Shift Perspective & Build Connection*

By Theo Koffler, Mindfulness Without Borders

Whether you're at home, in the classroom, or running a clinical practice, these conversation cards are meant to get people thinking and talking about who they are, what they like, and how they interact with the world around them. Each question targets different skills and areas of life, but all the questions have one primary purpose: to get you discussing the important fundamentals of an emotionally balanced, mindful and compassionate way of living.

## Live Seminar Continuing Education Credit Information

*Credits listed below are for full attendance at the live event only. After attendance has been verified, pre-registered attendees will receive an email from PESI Customer Service with the subject line, "Evaluation and Certificate" within one week. This email will contain a link to complete the seminar evaluation and allow attendees to print, email or download a certificate of completion if in full attendance. For those in partial attendance (arrived late or left early), a letter of attendance is available through that link and an adjusted certificate of completion reflecting partial credit will be issued within 30 days (if your board allows). Please see "LIVE SEMINAR SCHEDULE" on this brochure for full attendance start and end times. NOTE: Boards do not allow credit for breaks or lunch.*

*If your profession is not listed, please contact your licensing board to determine your continuing education requirements and check for reciprocal approval. For other credit inquiries not specified below, or questions on home study credit availability, please contact cepesi@pesi.com or 800-844-8260 before the event.*

*Materials that are included in this course may include interventions and modalities that are beyond the authorized practice of mental health professionals. As a licensed professional, you are responsible for reviewing the scope of practice, including activities that are defined in law as beyond the boundaries of practice in accordance with and in compliance with your profession's standards.*

*PESI, Inc. offers continuing education programs and products under the brand names PESI, PESI Healthcare, PESI Rehab and Psychotherapy Networker.*

**ETHICS:** This seminar includes 6.25 hours of general ethics instruction. If ethics is not specified within your licensing board's approval statement below, please contact your board to determine the applicability and amount of ethics allowed.

**ADDITION COUNSELORS:** This course has been approved by PESI, Inc., as a NAADAC Approved Education Provider, for 6.0 CE in the Legal, Ethical, and Professional Development skill group. NAADAC Provider #77553. PESI, Inc. is responsible for all aspects of their programming. Full attendance is required; no partial credit will be awarded for partial attendance.

**COUNSELORS:** This intermediate activity consists of 6.25 clock hours of continuing education instruction. Credit requirements and approvals vary per state board regulations. Please save the course outline, the certificate of completion you receive from the activity and contact your state board or organization to determine specific filing requirements.

**WISCONSIN COUNSELORS:** This intermediate activity consists of 6.25 clock hours of continuing education instruction. Credit requirements and approvals vary per state board regulations. Please contact your licensing board to determine if they accept programs or providers approved by other national or state licensing boards. A certificate of attendance will be awarded at the end of the program to participants who are in full attendance and who complete the program evaluation.

**MARRIAGE & FAMILY THERAPISTS:** This activity consists of 380 minutes of continuing education instruction. Credit requirements and approvals vary per state board regulations. You should save this course outline, the certificate of completion you receive from the activity and contact your state board or organization to determine specific filing requirements.

**WISCONSIN MARRIAGE & FAMILY THERAPISTS:** This course has been submitted to the Wisconsin Association for Marriage and Family Therapy for review. Credit is pending.

**Hassle-Free Cancellation Policy:** If you contact us before the event date, you can exchange for a DVD or CD/digital manual package on the subject (self-study continuing education credit may be available), a certificate to attend another seminar, or receive a tuition refund less a \$30 cancel fee. Substitutions are permitted at any time.

**Seminar on DVD or CD Package:** You can purchase a self-study package on the subject. You will receive a set of CDs or DVDs that include a digital copy of the seminar manual and post-test/evaluation. You and your colleagues can receive CE hours for a nominal fee. To determine if homestudy credits are available for your profession go to [www.pesi.com](http://www.pesi.com) or call 800-844-8260. Check with your licensing board to verify acceptance of self-study credits for license renewal. Order today by using the order form on this brochure or by calling 800-844-8260.

**Have a seminar idea? A manuscript to publish?** The nation's top speakers and authors contact PESI first. If you are interested in becoming a speaker or have a new topic idea, please contact Josh Lindblad at [jlindblad@pesi.com](mailto:jlindblad@pesi.com) or call 715-855-5234.

**NURSES, NURSE PRACTITIONERS, AND CLINICAL NURSE SPECIALISTS:** PESI, Inc. is accredited as a provider of continuing nursing education by the American Nurses Credentialing Center's Commission on Accreditation.

Nurses in full attendance will earn 6.3 contact hours. Partial contact hours will be awarded for partial attendance.

**PSYCHOLOGISTS:** This activity consists of 6.0 clock hours of continuing education instruction. The following state psychologist boards recognize activities sponsored by PESI, Inc. as an approved ACCME provider: Alaska, Arkansas, California, Colorado, Georgia, Illinois, Indiana, Kentucky, Maine, Maryland, Missouri, Nebraska, Nevada, New Hampshire, New Jersey, New Mexico, Oklahoma, Pennsylvania, South Carolina and Wisconsin. Certificates of attendance will be issued for you to submit to your state licensing board to recognize for continuing education credit.

PESI, Inc. is accredited by the Accreditation Council for Continuing Medical Education to provide continuing medical education for physicians. PESI, Inc. designates this live activity for a maximum of 6.0 AMA PRA Category 1 Credit(s)™. Physicians should only claim credit commensurate with the extent of their participation in the activity.

**SOCIAL WORKERS:** PESI, Inc., #1062, is approved to offer social work continuing education by the Association of Social Work Boards (ASWB) Approved Continuing Education (ACE) program. Organizations, not individual courses, are approved as ACE providers. State and provincial regulatory boards have the final authority to determine whether an individual course may be accepted for continuing education credit. PESI, Inc. maintains responsibility for this course. ACE provider approval period: January 27, 2017 - January 27, 2020. Social Workers completing this course receive 6.25 Ethics continuing education credits. Course Level: Intermediate. Full attendance is required; no partial credits will be offered for partial attendance. A certificate of attendance will be awarded at the end of the program to social workers who complete the program evaluation.

**OTHER PROFESSIONS:** This activity qualifies for 380 minutes of instructional content as required by many national, state and local licensing boards and professional organizations. Save your course outline and certificate of completion, and contact your own board or organization for specific requirements.



PLEASE RETURN ENTIRE REGISTRATION FORM

QUESTIONS? Call 800-844-8260 or e-mail us at [info@pesi.com](mailto:info@pesi.com).

## How to Register:

A COMPLETE GUIDE TO ETHICAL & LEGAL TECHNOLOGY CHALLENGES FOR MENTAL HEALTH PROFESSIONALS!

### ONLINE

[pesi.com/express/75532](http://pesi.com/express/75532)

### PHONE

800-844-8260

Please have credit card available

### FAX

800-554-9775

### MAIL

PESI, Inc.  
PO BOX 1000  
Eau Claire, WI  
54702-1000

**1 Please complete entire form** (to notify you of seminar changes):  
*please print; staple duplicate forms.*

**Mail Code:** \_\_\_\_\_  
*See mail code box on address panel on reverse side*

Name \_\_\_\_\_ Profession \_\_\_\_\_

Employer Name \_\_\_\_\_

Employer Address \_\_\_\_\_

Dept/Floor/Suite \_\_\_\_\_

City \_\_\_\_\_ County \_\_\_\_\_

State \_\_\_\_\_ Zip \_\_\_\_\_

Home/Cell Ph ( ) \_\_\_\_\_

Dept. Ph ( ) \_\_\_\_\_

\*E-mail address \_\_\_\_\_

\*Registrant's e-mail is required to receive your certificate of completion and registration confirmation.

**2 Check location:** *(make copy of locations)*

☐ **APPLETON, WI**  
**December 3, 2019** 75532APP

Red Lion Hotel Paper Valley  
333 W College Ave • 54911  
(920) 733-8000

☐ **WAUWATOSA, WI**  
**December 6, 2019** 75532WAO

Crowne Plaza Milwaukee West  
10499 W Innovation Dr • 53226  
(414) 475-9500

☐ **MADISON, WI**  
**December 11, 2019** 75532MAD

Hilton Madison Monona Terrace  
9 E Wilson Street • 53703  
(608) 255-5100

Register Now: [pesi.com/express/75532](http://pesi.com/express/75532)

#### ADA NEEDS

We would be happy to accommodate your ADA needs; please call at least two weeks prior to the seminar date.

#### WALK-INS

Walk-ins are welcome but admission cannot be guaranteed. Call M-F 7:00-6:00 Central Time for space availability if registering within one week of seminar.

#### TUITION OPTIONS

• **FREE Military Tuition:** PESI Inc. is proud to offer this seminar (at these locations only) **free of charge** (on live seminar tuition) for veterans and active duty military personnel. **Limited seats available; advance online registration required.**

• **\$30 Tuition:** If you are interested in being our registration coordinator for the day, go to: [www.pesi.com/coord](http://www.pesi.com/coord) for availability and job description, or call our Customer Service Dept. at 800-844-8260.

• **Groups of 5 or more:** Call 800-844-8260 for discounts.

• **Discounted Student Rate:** As part of its mission to serve educational needs, PESI, Inc. offers a reduced rate of 50% off standard tuition for students. Enclose a current student schedule with registration form.

Go to [www.pesi.com/students](http://www.pesi.com/students) or call 800-844-8260 for details. **Advance registration required. Cannot be combined with other discounts.**



FOR OFFICE USE ONLY

Fed ID # 26-3896894  
© 2019 PESI, Inc.

**3 Check tuition:**

#### TUITION WITH SEMINAR MANUAL

**\$219.99** - choose one of the options below:

- ☐ per person for 2 or more preregistering together —OR—
- ☐ single registration postmarked 3 weeks prior to seminar date

☐ **\$249.99** standard

#### ADD-ON PRODUCTS Distributed at seminar—FREE SHIPPING!

☐ **\$19.99\* Legal and Ethical Issues for Mental Health Clinicians** book

☐ **\$16.99\* RETHiNK Card Deck Mindful Conversation Starters**

\*Attendees add applicable state and local taxes except in AK, DE, MT, NH, OR

**4 Indicate method of payment:**

**ALL REGISTRATIONS MUST BE PREPAID.**  
**Purchase orders welcome (attach copy).**

☐ Check enclosed payable to **PESI, Inc.**

☐ MC 16 digits ☐ VISA 13-16 digits ☐ AE 15 digits ☐ Discover Novus 16 digits

Card # \_\_\_\_\_

Card Exp. \_\_\_\_\_ V-Code #\*: \_\_\_\_\_

Signature \_\_\_\_\_

(\*MC/VISA/Discover: last 3-digit # on signature panel on back of card.)

(\*American Express: 4-digit # above account # on face of card.)

#### CAN'T ATTEND THE SEMINAR?

**A Complete Guide to Ethical & Legal Technology Challenges for Mental Health Professionals!**

\_\_\_ **Seminar on DVD \*** (Video) \$219.99 (RNV055550)

\_\_\_ **Seminar on CD \*** (Audio) \$219.99 (RNA055550)

\_\_\_ **Legal and Ethical Issues for Mental Health Clinicians\*** book \$19.99 (PUB084465)

\_\_\_ **RETHiNK Card Deck Mindful Conversation Starters\*** \$16.99 (PUB085205)

CE hours and approvals on products may differ from live CE approvals.

\*Shipping is \$6.95 first item  
+ \$2.00 each add'l item.

\*\*Residents add applicable state and local taxes except in AK, DE, MT, NH, OR

Product total \$ \_\_\_\_\_

\*Shipping \_\_\_\_\_

Subtotal \_\_\_\_\_

\*\*Tax \_\_\_\_\_

TOTAL \_\_\_\_\_