

## Outline

### SETTING THE STAGE FOR BEST PRACTICES

- Having a Code of Ethics to Follow
- Boundary Contexts and Why They Matter
- Setting up a Peer Group to Seek Counsel for Ethical Dilemmas
- The "Always Do No Harm to Your Clients" Rule

### TOP BOUNDARY CHALLENGES AND ETHICAL TRAPS

- Self-Disclosure – A Slippery Slope
- Giving & Receiving Gifts
- Physical Contact & Proximity in Session
- Language Usage in Session
- Contact Outside of Sessions
- Minors & Parents
- Handling Clients Who Lack Boundary Skills

### TECHNOLOGY AND BOUNDARIES

- Social Media – How to Avoid Ethical Issues
- Email, Texting & Phone Call Boundary Challenges
- Telehealth and the Impact on Boundaries

### PRIVATE PRACTICE ETHICAL IMPLICATIONS & GRAY AREAS

- Impact of Isolation on Boundaries
- Why Private Practice Heightens All Boundary Concerns
- Policies & Procedures that Can Reduce Ethical Boundary Issues

### DUAL RELATIONSHIPS (FRIENDS, FAMILY, STUDENTS, EMPLOYEES, BUSINESS, ACQUAINTANCE)

- Developing a Strategy for Dual Relationships
- Evaluate Your Ability to Handle the Dual Relationship at Hand
- Creating a Proper Treatment Plan that Assists with Boundary Concerns
- Top Mistakes Clinicians Make Regarding Dual Relationships

### FINANCIAL & BUSINESS – NAVIGATING BOUNDARY ISSUES

- Self-Referral Policies & Procedures
- Collection Process for Nonpayment of Fees
- Fee Establishing & Transparency Guidelines
- Sliding Scales & Bartering
- Confidentiality & Privacy Concerns

## Objectives

- Analyze how following a code of ethics applies to boundary setting in clinical practice.
- Evaluate the unique boundary issues that arise in private practice and how to effectively handle them.
- Employ best practices for avoiding boundary issues related to self-referral policies and procedures.
- Appraise ethical dilemmas related to self-disclosure and language usage in session.
- Assess the ethical challenges that technology poses in a clinical setting.
- Establish ethical guidelines to effectively handle possible dual relationships with clients in clinical practice.

## Live Seminar & Webcast Schedule

(Times Listed in Pacific)

**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.



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.*

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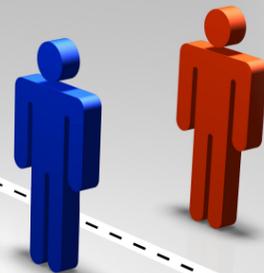
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# Boundaries in Clinical Practice

## Top Ethical Challenges



**Salinas, CA**  
Monday, February 24, 2020

**San Jose, CA**  
Tuesday, February 25, 2020

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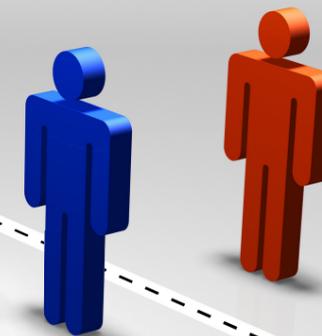
# Boundaries in Clinical Practice

## Top Ethical Challenges

### Answers to the Biggest Boundary Challenges Clinicians Face

- Top Social Media & Technology Boundary Mistakes to Avoid
- When is a Dual Relationship OK? Is a Dual Relationship Ever OK?
- In-Session & Out-of-Session Do's and Don'ts
- Private Practice Boundary Setting Concerns
- Specific Tips and Strategies for Clinicians Regarding Fees and Referrals

6.25  
CE Hours  
of Ethics



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# Boundaries in Clinical Practice

## Top Ethical Challenges

Boundary issues present some of the largest challenges you'll face as a clinician. How you communicate and interact can be interpreted differently by each client. Your professional liability is at risk by not following clear guidelines and best practices when it comes to boundaries.

This seminar will provide you with answers to the top challenges you face. You'll get guidance on the following ethical boundary pitfalls:

- Social Media
- Email & Text
- Self-Disclosure
- Gifts & Receiving Gifts
- Contact Outside of Session
- Dual Relationships
- Financial & Business Boundaries

Sign up today and avoid ethical entanglements that risk your professional liability!

## Speaker

**Latasha Matthews, MA, LPC, CPCS, CPLC**, specializes in private practice development and counselor development. She is the author of *The Dumping Ground: A Guide to Gaining Powerful Skills to Set Life-Changing Boundaries*. In addition, Ms. Matthews is an adjunct professor at Shorter University, Atlanta and the owner of Illumination Counseling and Coaching, LLC. She is the co-founder of Pieces that Fit, Inc., a 501(3)(c) organization that provides support for cultural diversity, mental health, academic success and life skills.

With over 20 years of experience in the human services field, Ms. Matthews has a wealth of knowledge, experience and passion that she loves to share with the world. She develops and conducts several workshops and educates counselors across the nation. She provides consultation, mentorship and internships to clinicians as often as she can. She serves as a committee member on the board for certified professional counselor supervisors from the State of Georgia.

Ms. Matthews earned her Bachelor of Science degree from the University of Akron, in Human Resources and her MA in Professional Counseling and Certificate in Marriage and Family Therapy from Argosy University. Her professional memberships include the American Counseling Association, Association for Counselor Education and Supervision, Southern Association for Counselor Education and Supervision, Licensed Professional Counselors Association of Georgia, *Chi Sigma Iota*.

**Speaker Disclosures:**  
Financial: Latasha Matthews is in private practice. She receives a speaking honorarium from PESI, Inc. Non-financial: Latasha Matthews is a member of the American Counseling Association; and Licensed Professional Counselors Association of Georgia.

**Target Audience**

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

### Questions?

Visit our FAQ page at [www.pesi.com/faq](http://www.pesi.com/faq) or contact us at [www.pesi.com/info](http://www.pesi.com/info)

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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.

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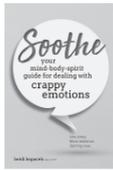


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56 Practices to Help You Detox, De-Stress, Distract and Discover

By Goali Saedi Bocci, PhD

Buzzing, ping-pong and grasping for our attention, our phones and screens can cause significant distress, as we lose touch with reality and the importance of self-care and emotional well-being. Take advantage of the 56 practices inside to detox from your devices, feel rejuvenated, find healthier coping skills, and embrace the present moment.



### Soothe

Your Mind-Body-Spirit Guide for Dealing with Crappy Emotions

By Heidi Kopacek

In *Soothe: Your Mind-Body-Spirit Guide for Dealing with Crappy Emotions*, clinical psychologist and basically your new best friend, Dr. Heidi Kopacek, gives you a holistic approach to de-frazzling from 21st century stress and negativity.

**Hassle-Free Cancellation Policy:** If you contact us before the event date, you can exchange for a self-study package on the subject (CE credits 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.

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### 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](mailto: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.

**Addiction 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.

**California Alcoholism & Drug Abuse Counselors:** PESI, Inc. is an approved provider by the CCAPP-EI, Provider #: OS-03-036-1019. This activity meets the qualifications for 6.0 CEH's (continuing education hours).

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**California Counselors:** The California Board of Behavioral Sciences accepts CE programs that are approved by other approval agencies, including several that approve PESI and its programs. A full list of approval agencies accepted by the BBS can be found at [www.bbs.ca.gov/licenses/cont\\_ed.html](http://www.bbs.ca.gov/licenses/cont_ed.html) under "Where to find CE Courses." This Intermediate level activity consists of 6.0 clock hours of continuing education instruction.

**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.

**California Marriage & Family Therapists:** The California Board of Behavioral Sciences accepts CE programs that are approved by other approval agencies, including several that approve PESI and its programs. A full list of approval agencies accepted by the BBS can be found at [www.bbs.ca.gov/licenses/cont\\_ed.html](http://www.bbs.ca.gov/licenses/cont_ed.html) under "Where to find CE Courses." This Intermediate level activity consists of 6.0 clock hours of continuing education instruction.

**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.

**California Nurses:** PESI, Inc. is a provider approved by the California Board of Registered Nursing, Provider Number 17118 for 6.0 contact hours. Full attendance is required. No partial contact hours will be issued for partial attendance.

**California Psychologists:** PESI, Inc. is approved by the CPA OPD to sponsor continuing education for psychologists. Provider #PE5010. PESI maintains responsibility for this program and its contents. PESI is offering this activity for 6.25 hours of continuing education credit. Full attendance is required; no partial credits will be offered for partial attendance.

**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.

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**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.



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### BOUNDARIES IN CLINICAL PRACTICE: TOP ETHICAL CHALLENGES

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### ADA NEEDS

We would be happy to accommodate your ADA needs; please email [info@pesi.com](mailto:info@pesi.com) or call 1-800-844-8260 at least two weeks prior to the seminar date.

### SAME DAY REGISTRATION

Walk-ins are welcome but admission cannot be guaranteed. Contact us for space availability if registering within one week of seminar.

### TUITION OPTIONS

Advance registration required. Cannot be combined with other discounts.

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

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