Outline

Strategic Approach to Protect Yourself, Your Practice and Your Clients
Awareness of codes, laws and regulations
Have a prevention mindset
Skills to navigate confusing systems
Decision-making process
Access to resources and tools to help

Sorting Out Codes of Ethics and Codes of Conduct
How ethics codes are established and why this matters
Ethical principles vs ethical standards at an advanced level
Key overlooked and misunderstood terminology

Deciphering Laws/Statutes, Rules, and Regulations
Federal laws – Which laws apply and why (e.g., HIPAA vs. FERPA)
Untangling state laws, statutes, rules, and regulations
States' laws and regulations are not the same across states
Jurisdictional Issues – Practicing across state lines
Civil suits – What a plaintiff must demonstrate
Think like a licensing board and how to avoid disciplinary actions
How to respond to subpoenas and court orders
Risk - Knowing yourself and when you are on thin ice
The law of unforeseen consequences
Vicarious liability

Strategies for Reducing Risk, Avoiding Problems, and Maintaining Your Sanity
Social media and communication policy
Teletherapy-specific informed consent process
Exceptions to confidentiality on your practice website
Maintain a case load that is sustainable
How to ethically make referrals to other providers
VPN for security for online work
Boundaries, multiple relationship, and power differentials
BAAs with all HIPAA business associates

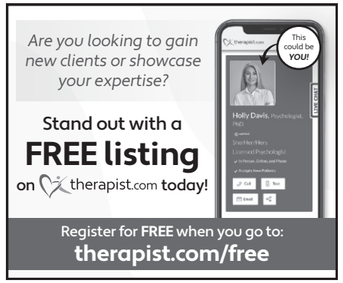
Advanced Tools and Resources for the Current Times
A framework to easily navigate dilemmas
Cloud-based practice management systems
Online resource regarding distance therapy and COVID-19.
App for sorting out teletherapy interjurisdictional practice issues
Psychotherapy notes – An underutilized HIPAA-authorized tool
And more!

Case Studies of Advanced/Challenging Issues and Vignettes
Practice operational issues - Referral streams & fee splitting; Legal and Ethical
Boundaries - Boundary crossing; variables; physical boundaries & gifts
Social media, email and texting -Tweets; Emails and the at-risk client; texting and boundaries
Multiple relationships- Dual relationships & power differentials
Distance therapy related- Distance therapy & COVID-19; out-of-state counseling
Minors, confidentiality, consent, & records access
Combined issues- Testimonials, websites, supervision; distance therapy dilemma; the play therapy request

Live Webinar Schedule
(Times listed in Eastern)
8:00 Program begins
11:50-1:00 Lunch Break
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.

Objectives

1. Describe the interrelationships among codes of ethics, federal and state laws, and licensing regulations.
2. Demonstrate familiarity with accessing and using tools and resources for compliant practice including secure, HIPAA , compliant internet access, business associate agreements, and telehealth law applications.
3. Analyze ethical and legal aspects of key technology-related topics including social media & communication policies, nuances of distance therapy, email & texting, and practice management systems.
4. Integrate specific strategies for mitigating risk and avoiding ethical and legal problems.
5. Identify the five essential perspectives for navigating all ethically problematic situations.
6. Describe a process for effectively navigating ethically and legally challenging scenarios.





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- Develop effective policies for ethical & legal practice
- Advanced strategies for mitigating risk
- Navigating whether to utilize practice management systems

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You will leave with **a guide that will help establish a process for managing ethical, legal, and other types of risk.** Also covered, is an exploration of related advanced topics. For example:

- Making sense of the relationship between ethics, laws, and licensing regulations
- Codes of ethics: Seeing beyond the surface
- How to think like a licensing board
- Navigating your practice through the ethical, legal and operational maze
- Operational decision-making: (e.g.) Can I – and should I – offer distance therapy?"

Additionally, you will receive a variety of useful and timely information, tools, and resources to take back to your clinical practice immediately. Some of the topics covered:

- Establishing a communication and social media policy
- Cloud-based practice management systems
- Distance therapy/telehealth
- Practicing across state lines
- Education on training non-clinical staff (e.g., receptionists/schedulers)
- Developing policies and procedures: How to make use of codes of ethics and licensing regulations
- Strategies for avoiding problems and improving operations.

You will leave the course with **useful tools, resources, insight and examples of how to work through real-life ethical, legal and related dilemmas from advanced perspectives.**

Target Audience:

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



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Meet Your Speaker

TERRY CASEY, PhD, HSP, is a Licensed Psychologist, HSP (Health Service Provider) with over 30 years of professional experience, including a 16-year tenure as the director of counseling & psychological services for a non-profit agency with over 30 counselors at over a dozen locations. He is in private practice in Franklin Tennessee, teaches ethics and professional issues in counseling at Lipscomb University's Clinical Mental Health Counseling program, and guest lectures at Trevecca Nazarene University's clinical counseling Ph.D. program.

Dr. Casey also served for several years as the chair of the ethics committee for the Tennessee Licensed Professional Counselors' Association and in an advisory capacity for graduate counseling programs at two universities. He has presented frequently on ethics to organizations such as the American Counseling Association, the Tennessee Licensed Professional Counselors Association, the Nashville Area Association of Christian Counselors, and others. For more information, visit his practice website at rencounselingtn.com.

Speaker Disclosure:

Financial: Dr. Terry Casey maintains a private practice and is a faculty member of Lipscomb University. He is a published author and receives royalties. Dr. Casey receives a speaking honorarium and recording royalties from PESI, Inc. He has no relevant financial relationships with ineligible organizations.

Non-financial: Dr. Terry Casey is a member of the American Psychological Association, the Tennessee Psychological Association, the Tennessee Licensed Professional Counselor Association, and others. For a complete list, please contact info@pesi.com.

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This course has been approved by PESI, Inc., as a NAADAC Approved Education Provider, for 6.25 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.

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This program is Approved by the National Association of Social Workers (Approval # 886759332-1854) for 6.0 Ethics continuing education contact hours.

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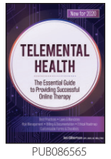
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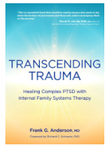
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Recommended Reading:



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The Essential Guide to Providing Successful Online Therapy
Joni Gilbertson, MA, NCC, LCPC, LMHC, BC-TMH, CTMH
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Transcending Trauma
Healing Complex PTSD with Internal Family Systems
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