

## 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 Central)


**9:00** Program begins  
**11:50-1:00** Lunch Break  
**5:00** 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.

Are you looking to gain new clients or showcase your expertise?

Stand out with a **FREE listing** on  **therapist.com today!**

Register for FREE when you go to: **therapist.com/free**



NON-PROFIT  
ORGANIZATION  
U.S. POSTAGE PAID  
EAU CLAIRE, WI  
PERMIT NO. 32729

**Group Training  
Solutions Made Easy!**

- **ONLINE** or in-person
- **Customizable**
- **Easy remote access**
- **From 5 to 5000**
- **CE hours available**



**www.pesi.com/inhouse**

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


**Earn up to 6.25 CE Hours of Ethics During this Live Webinar!**

# Ethical, Legal, and Professional Issues for the Advanced Practice Clinician

## Strategies for Reducing Risk in Clinical Practice

**LIVE Interactive Webinar**  
**Monday, January 23, 2023**

**BONUS! – Registration includes FREE on-demand access for 3 months.**

 **REGISTER NOW:**  
**pesi.com/webcast/88154**

**Earn up to 6.25 CE Hours of Ethics During this Live Webinar!**

# Ethical, Legal, and Professional Issues for the Advanced Practice Clinician


## Strategies for Reducing Risk in Clinical Practice

**Not another ethics 101 course...topics covered:**

- Assess and navigate complex situations
- Hidden interactions: Integrate ethical, legal, clinical & practice issues
- The complexities of telehealth practice
- Develop effective policies for ethical & legal practice
- Advanced strategies for mitigating risk
- Navigating whether to utilize practice management systems

**Live Interactive Webinar**  
**Monday, January 23, 2023**

**BONUS! – Registration includes FREE on-demand access for 3 months.**

 **REGISTER NOW:**  
**pesi.com/webcast/88154**

A Non-Profit Organization Connecting Knowledge with Need Since 1979

## Ethical, Legal, and Professional Issues for the Advanced Practice Clinician

**Finally...an *ADVANCED* training in ethical, legal and practice issues!**

This course will equip you with a practical, easy-to-use framework for navigating ethical, legal and practice issues of all types. It is especially designed for experienced clinicians and those who are in leadership roles who don't need another 101 ethics training.

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



**Risk Free Purchase!** PESI stands by our trainings and we have a 100% satisfaction guarantee. If you are not satisfied, please contact our customer service team at [www.pesi.com/info](http://www.pesi.com/info) or 800-726-3888 and we will make it right.

### PESI Offers Group Discounts!

To save on groups of 5 or more, contact us at [pesi.com/info](http://pesi.com/info)!

**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).

**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 **Spencer Jahnke** at [sjahnke@pesi.com](mailto:sjahnke@pesi.com) or call **715-855-8206**.

## 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](http://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](mailto:info@pesi.com).

### CE CREDITS AVAILABLE FOR LIVE WEBINAR

This continuing education activity is designed to meet state board requirements for the following professionals: **Counselors, Marriage and Family Therapists, Psychologists, and Social Workers.**

For specific credit approvals, details, and planning committee disclosures, please see the "credit approvals and details" URL below. For speaker disclosures, please see speaker bios.

#### National CE Credit Approvals For Live Webinar

Credits listed are for full attendance at the live webinar only. The CE certificate can be downloaded/printed after completing the webinar, passing the online post-test (80% passing score), and completing the evaluation. Please see schedule for full attendance start and end times. NOTE: Boards do not allow credit for breaks or lunch.

**\*includes up to 6.25 hours of general ethics instruction.**



**Psychologists:** PESI, Inc. is approved by the American Psychological Association (APA) to sponsor continuing education for psychologists. PESI maintains responsibility for this program and its content. 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. Course Level: Intermediate.



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.



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, 2020 - January 27, 2023. 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.

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

**Self-study credit:** To check availability for your profession, go to [www.pesi.com](http://www.pesi.com) or call 800-726-3888 with your licensing board to verify acceptance of self-study credit for license renewal.

\*Content and materials in this course may include interventions and modalities that are beyond the authorized practice of your profession. 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 Kids, PESI Rehab and Psychotherapy Networker.

Earn up to  
**6.25 CE**  
Hours for one  
low price!

For all credit approvals and details, visit: [www.pesi.com/webcast/88154](http://www.pesi.com/webcast/88154)

## SIGN UP-TODAY! Choose your Learning Experience!

**PESI offers multiple formats to fit your CE needs**

**Register Online at: [pesi.com/webcast/88154](http://pesi.com/webcast/88154)**

### Live Interactive Webinar (*Option 1*)

**January 23, 2023** [PWZ88153]

**\$219.99** tuition

9am Central time

**Live Webinar Experience:**

- Participate live in real-time while connecting and collaborating with peers
- Ask the presenter your questions
- Earn a live CE certificate

**FREE BONUS:** Replay on-demand access for 90-days after webinar

*\*Live CE is only available when viewed live*

**Get a Group Discount!** Contact us at [pesi.com/info](http://pesi.com/info) to save for groups of 5 or more

### On-Demand Digital Seminar (*Option 2*)

**\$219.99** [POS058125]

**Digital Seminar Experience:**

- Learn at your own pace with 24/7 access from your PESI account
- Access to the program materials
- Enjoy lifetime on-demand access
- Earn a self-study CE certificate

CE hours and approvals may vary from live event. Visit [www.pesi.com](http://www.pesi.com) or call 800-726-3888 to check for availability.

### DVD (*Option 3*)

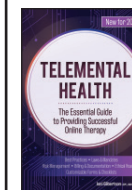
**\$219.99** [RNV058125]

**DVD Experience:**

- Self-study CE certificate available

CE hours, approvals and cost of CE Certificates may vary from live event. Visit [www.pesi.com](http://www.pesi.com) or call 800-726-3888 to check for availability and pricing

## Recommended Reading:

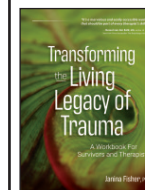


**Telemental Health**  
*The Essential Guide to Providing Successful Online Therapy*

Joni Gilbertson, MA, NCC, LCPC, LMHC,  
BC-TMH, CTMH

~~\$24.99~~ **\$19.99\***

PUB086565



**Transforming The Living Legacy of Trauma: A Workbook for Survivors and Therapists**

Janina Fisher, Ph.D.

~~\$29.99~~ **\$22.99\***

PUB086530

*\* Discount Included with purchase of the Webinar*

### OTHER WAYS TO REGISTER

**Phone: 800-726-3888**

Fax: 800-554-9775

Mail: PESI, Inc.  
PO Box 1000  
Eau Claire, WI 54702-1000

\*If mailing/faxing registration, find form at [www.pesi.com/form](http://www.pesi.com/form) or call 800-726-3888

### ADA NEEDS

We would be happy to accommodate your ADA needs; Please notify us at time of registration.

### QUESTIONS

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

### TAXES AND SHIPPING

Taxes and shipping apply where applicable, see website for details

