

## Outline

### Ethical and moral principles regarding boundary setting

- Levels of ethical practice
- Ethical decision making

### The need for boundaries in a clinical/private practice setting

- What is needed in a sound informed consent
- Boundary crossing and the necessity of dual relationships
- What healthy boundaries looks like
- Boundary tips

### Technology and boundary setting

- Keeping clients safe as you prepare for the use of telemental health
- Social media myths and boundary setting
- Marketing and boundary setting
- Challenges business owners face in setting solid business enhancing boundaries
- Client retention: When to refer and to whom

### Ethical financial dilemmas and boundary setting

- Addressing money: Relationship with money and money beliefs
- The importance of ethical fee setting
- Knowing your WHY and business planning

### How counselor impairment impacts the therapeutic relationship

- Boundary setting in self-care
- Critical stress factors clinicians face
- Self-confidence and using the word NO to set boundaries
- How burnout, vicarious trauma and compassion fatigue impacts the therapeutic relationship

### Explore positive outcomes in private-practice/clinical work

- Benefits of boundary setting to the clinician, client, community and the profession

## Objectives

1. Establish how the ACA Code of Ethics applies to boundary setting in private practice/clinical practice.
2. Consider ethical dilemmas clinicians face surrounding boundary setting with respect to utilizing technology with clients in clinical practice.
3. Articulate the financial burdens clinicians experience that could cause ethical dilemmas in clinical practice.
4. Establish ethical practices to ensure client safety, maintain confidentiality and obtain informed consent when utilizing telemental health services.
5. Determine how counselor impairment influences the therapeutic relationship and identify ethical strategies to minimize the potential impact on the client.
6. Establish clear ethical guidelines to address the potential for a dual relationship with a client in a clinical setting.

### Target Audience:

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



**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.

Don't Miss!  
**LIVE VIDEO  
WEBCAST**

**MONDAY**  
**December 16, 2019**

REGISTER ONLINE  
[pesi.com/webcast/75663](http://pesi.com/webcast/75663)

### Bring any Training On-Site!

- Cost Effective for Groups
- Customizable
- Flexible



[www.pesi.com/inhouse](http://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.

# Boundary Setting in Clinical Practice

## The Best Ethical Practices

**BIRMINGHAM, AL**  
Monday, December 16, 2019

**LIVE VIDEO WEBCAST**  
Monday, December 16, 2019

**HUNTSVILLE, AL**  
Tuesday, December 17, 2019

**MONTGOMERY, AL**  
Wednesday, December 18, 2019

# Boundary Setting in Clinical Practice

## The Best Ethical Practices

- Resolve boundary conflicts and ethical dilemmas in business and with clients
- The importance of utilizing the word NO
- Social Media myths and boundary setting
- Learn and develop skills for boundary setting around self-care

**6.25 CE  
Hours of  
Ethics**

**BIRMINGHAM, AL**  
Monday, December 16, 2019

**LIVE VIDEO WEBCAST**  
Monday, December 16, 2019

**HUNTSVILLE, AL**  
Tuesday, December 17, 2019

**MONTGOMERY, AL**  
Wednesday, December 18, 2019



A NON-PROFIT ORGANIZATION CONNECTING KNOWLEDGE WITH NEED SINCE 1979

[www.pesi.com](http://www.pesi.com)

Register now! [pesi.com/express/75456](http://pesi.com/express/75456)

Register now! [pesi.com/express/75456](http://pesi.com/express/75456)

# Boundary Setting in Clinical Practice

Are you having trouble saying "No" to clients?

Do you struggle with establishing and maintaining healthy boundaries?

Do you avoid setting boundaries for fear of losing a client?

As clinicians we come face to face with "gray areas" on a daily basis and skate around potential issues that could put our businesses, clinical work or clients in jeopardy. We struggle with setting boundaries personally and professionally and it ultimately has a negative impact on the clients we serve.

Latasha Matthews MA, LPC, CPCS, CPLC will use activities, vignettes and practical business experience to discuss the boundary issues and dilemmas that exist (and are often overlooked and swept aside) that could impact your business, your bottom line and your clients. Develop the confidence needed to address complex boundaries issues in clinical practice.

## 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 5013(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 Disclosure:

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.

### Live Webcast Details and Live Webcast Continuing Education Credit Information

**Join us on December 16, 2019, for this live, interactive webcast!** Invite your entire office and, like a live seminar, "attend" the webcast at its scheduled time. It's easy and convenient! Webcasts provide everything you need for a premier educational experience including real-time video and audio of the speaker. See and hear the speaker, ask questions via email and have them answered during the webcast, and watch the slides all on your computer screen. Seminar materials are available for download. One CE Certificate is included. Certificates of Completion can be printed after completing and passing the on-line post-test evaluation. Additional certificates are available for \$49.99 USD per participant. Please see "live seminar schedule" for full attendance start and end times. NOTE: Boards do not allow credit for breaks or lunch. For CE information for the live webcast, please visit: [www.pesi.com/webcast/75663](http://www.pesi.com/webcast/75663)

### Questions?

Call customer service at **800-844-8260**

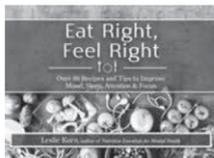
### Have a seminar idea? A manuscript to publish?

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



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!

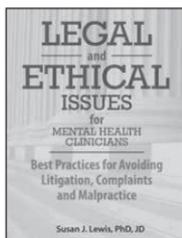


#### Eat Right, Feel Right:

Over 80 Recipes and Tips to Improve Mood, Sleep, Attention & Focus

By Leslie Korn, PhD, MPH, LMHC

Improve mood, sleep and focus with these nutrient-rich recipes and handy tips. Eat Right, Feel Right teaches you the do's and don'ts of using ingredients in entrees, snacks, soups, smoothies and dressings to make you an at-home mental health chef.



#### Legal and Ethical Issues for Mental Health Clinicians

Best Practices for Avoiding Litigation, Complaints and Malpractice

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

Psychologist and attorney Susan J. Lewis, PhD, JD, brings her 25 years of clinical practice and legal expertise directly to you - with practical guidance, strategies, solutions and up-to-date information to help keep you out of court and jail. Dr. Lewis uses 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 that arise in your practice.

#### Live Seminar & Webcast Schedule:

(Times listed in Central)

**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.

**Seminar on CD or DVD 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.

### 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.

**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.

**Alabama 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 the Alabama Board of Examiners in Counseling prior to the activity to determine requirements. A certificate of attendance will be awarded at the end of the program to counselors 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.

**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. Full attendance is required; no partial credits will be offered for partial attendance.

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 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.



## How to Register:

**ONLINE**  
[pesi.com/express/75456](http://pesi.com/express/75456)

**PHONE**  
800-844-8260  
Please have credit card available

**FAX**  
800-554-9775

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

## Boundary Setting in Clinical Practice: The Best Ethical Practices

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

**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 \_\_\_\_\_

For your convenience, confirmations are sent via email.

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

**BIRMINGHAM, AL**  
**December 16, 2019** 75456BIR  
Hilton Birmingham at UAB  
808 S 20th St • 35202 • (205) 933-9000

**LIVE VIDEO WEBCAST**  
**December 16, 2019** PLW75456  
Broadcast LIVE to your computer!

**HUNTSVILLE, AL**  
**December 17, 2019** 75456HUN  
Four Points Sheraton Huntsville Airport  
1000 Glenn Hearn Blvd SW • 35824 • (256) 772-9661

**MONTGOMERY, AL**  
**December 18, 2019** 75456MON  
Hilton Garden Inn Montgomery East  
1600 Interstate Park Drive • 36109 • (334) 272-2225

**Register now!**  
[pesi.com/express/75456](http://pesi.com/express/75456)

PLEASE RETURN ENTIRE REGISTRATION FORM

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

**3 Check tuition:**

**On-Site 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\*** *Eat Right, Feel Right* book  
 **\$19.99\*** *Legal and Ethical Issues for Mental Health Clinicians* book

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

#### WEBCAST with downloadable seminar manual

**\$219.99** registration (+ tax in HI, NM)

**4 Indicate method of payment:**

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

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

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

##### Boundary Setting in Clinical Practice: The Best Ethical Practices

\_\_\_ Seminar on DVD\* (video) \$219.99 (RNV051880)  
\_\_\_ Seminar on CD\* (audio) \$219.99 (RNA051880)  
\_\_\_ *Eat Right, Feel Right* book\* \$19.99 (PUB084920)  
\_\_\_ *Legal and Ethical Issues for Mental Health Clinicians* book\* \$19.99 (PUB084465)

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 \_\_\_\_\_