

# CareCertify LLC

## Behavioral & Mental Health Training Series

BH-07

# Professional Boundaries & Ethics

### *Participant Guide*

Behavioral & Mental Health Training Series · Audience: ARMHS · CTSS · Behavioral Aides · MH Practitioners · Case Managers · CE Hours: 1.0

## Genuine Relationships, Clear Boundaries

Behavioral health work runs on relationships — trusting, sometimes intense connections with people who may be vulnerable and dependent on your support. Those relationships are powerful and healing, and exactly because of that power, boundaries and ethics matter. Minnesota's 245I standards require boundary training for a reason.

This guide draws the lines: dual relationships, gifts, confidentiality, self-disclosure, and the ethical principles behind them. You can care deeply and stay professional — in fact, the boundary is part of what makes your care safe.

### Learning Objectives — by the end of this module you will be able to:

- Define professional boundaries and the therapeutic relationship
- Avoid dual relationships and conflicts of interest
- Apply rules on gifts, money, and confidentiality
- Use self-disclosure appropriately, if at all
- Recognize and address boundary crossings

## Section 1: Professional Boundaries and the Therapeutic Relationship

Professional boundaries are the limits that keep the helping relationship focused on the client's treatment and safe for both people. The therapeutic relationship is genuinely warm and supportive, but it is bounded — it is not a friendship, romance, or business relationship. Boundaries protect clients, who may be vulnerable and dependent, and they protect you and your work.

## Section 2: Dual Relationships and Conflicts of Interest

A dual relationship is having a second kind of relationship with a client — friend, business partner, landlord, or romantic partner. These create conflicts of interest and open the door to exploitation, so avoid them. Romantic or sexual relationships with clients are never acceptable and are a serious ethical and possibly legal violation. Don't do private side work for clients either.

## Section 3: Gifts, Money, and Favors

Don't accept money, valuable gifts, tips, or loans from clients, don't lend to or borrow from them, and don't handle their finances or become a beneficiary or witness. Misusing a vulnerable adult's money or property is reportable maltreatment under the Vulnerable Adults Act. Follow your agency's policy on small, token gifts.

## Section 4: Confidentiality and Social Media

Keep everything clients share confidential, sharing only with the team as needed and per data-privacy law. Don't connect with clients on social media or post about them — even 'anonymous' posts can identify people. Protect records and devices. The next lesson covers client rights, confidentiality, and data privacy in depth.

## Section 5: Self-Disclosure: Helpful vs. Harmful

Self-disclosure — sharing your own experiences — can occasionally help a client feel understood, but it's easy to overdo. Use it sparingly and briefly, and only when it clearly serves the client, never to meet your own needs or shift the focus to you. When you're unsure whether to disclose, don't, and bring the question to supervision.

## Section 6: Ethical Principles in Behavioral Health

Behind the boundary rules are ethical principles: respect the client's autonomy, do good and avoid harm, be honest and trustworthy, treat clients fairly, and act with integrity even when no one is watching. Put the client's welfare first. When you face an ethical gray area, consult your supervisor — sound ethics is a team practice, not a solo guess.

## Section 7: Recognizing and Addressing Boundary Crossings

Boundary problems usually start small: keeping secrets with a client, favoring one client, contact outside of work, oversharing about your own life, or feeling you're the only one who can help. Notice these early and bring them to supervision. Addressing a slip early keeps the relationship therapeutic and protects everyone.

### When unsure, ask

If you're not sure whether something crosses a line, that uncertainty is the signal to consult your supervisor before acting.

## Section 8: Boundaries, Burnout, and Longevity

Boundaries aren't only about ethics rules — they sustain you. Blurred boundaries lead to burnout, over-involvement, and risk to your role or license. Clear boundaries keep the relationship clean and the client safe, model healthy relationships, and let you keep doing this meaningful work for the long run.

## Key Terms

Term	What it means
Professional boundary	The limit that keeps the helping relationship therapeutic and safe.
Therapeutic relationship	A warm but bounded relationship focused on the client's

	treatment.
Dual relationship	A second role with a client (friend, business, romantic) — to be avoided.
Self-disclosure	Sharing your own experiences — used sparingly, for the client's benefit.
Conflict of interest	When personal interest could compromise professional judgment.
Financial exploitation	Misusing a vulnerable adult's money or property — reportable.

## Check Your Understanding

1. What is the difference between a therapeutic relationship and a friendship?
2. Why avoid dual relationships?
3. What are the rules on gifts and a client's money?
4. When is self-disclosure appropriate?
5. Name two warning signs of a boundary crossing.

## What's Next

### Looking ahead

Next, BH-08: Client Rights, Confidentiality & Data Privacy covers clients' rights and the laws protecting their information.