

# Ethical Leadership & Clinical Supervision Worksheet

Mentee Name: \_\_\_\_\_ Supervisor: \_\_\_\_\_ Case Reference ID (No Names): \_\_\_\_ Date: \_\_\_\_\_

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## Section 1: HIPAA & Security Compliance

*To be completed at the start of every supervision session.* - [ ] **The "Room Rule":** Is the mentee in a private space where client data cannot be overheard? - [ ] **De-identification:** Are we using initials or Case IDs only? - [ ] **Platform Security:** Are we using a BAA-compliant platform for this call/file sharing?

## Section 2: Clinical Ethics & Necessity

*Evaluate the proposed protocol against the "Patient-First" financial model.*

**1. Testing Justification:** Does the proposed lab test (e.g., stool, hormone, organic acids) directly change the clinical outcome, or is it "data curiosity"? *Mentee Rationale:*

\_\_\_\_\_

**2. Supplement Transparency:** - [ ] Have 2–3 brand options been provided to the client? - [ ] Has the practitioner disclosed any commissions/financial interests? - [ ] Is every supplement linked to a specific clinical goal?

**3. Scope of Practice Check:** Does this case involve "Red Flags" (e.g., suicidal ideation, undiagnosed acute pathology) that require immediate referral? - [ ] No red flags present. - [ ] Referral made to: \_\_\_\_\_

## Section 3: The L.E.A.D. Framework (Team Conflict)

*Complete this section only if there is a disagreement between team members (e.g., Coach vs. Nutritionist).*

- **L - Listen:** Summarize the conflicting viewpoint: \_\_\_\_\_
- **E - Empathize:** What is the shared goal for the client? \_\_\_\_\_
- **A - Align:** What do the written Scope of Practice guidelines say? \_\_\_\_\_
- **D - Direct:** What is the actionable path forward? \_\_\_\_\_

## Section 4: Professional Boundaries & Leadership

*A self-reflection for the mentor/supervisor.*

Boundary Check	Yes	No	Action Required
Am I maintaining "Professional Distance" (vs. befriending)?	<input type="checkbox"/>	<input type="checkbox"/>	
Did I apply the "24-Hour Rule" for non-urgent social requests?	<input type="checkbox"/>	<input type="checkbox"/>	
Did I model "Clinical Humility" by admitting what I don't know?	<input type="checkbox"/>	<input type="checkbox"/>	
Is the mentee's time being respected (Punctuality)?	<input type="checkbox"/>	<input type="checkbox"/>	

## Section 5: Mentee Growth & Reflection

**Mentee - What is one ethical nuance you learned from this case?**

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**Supervisor - Feedback/Next Steps for Mentee:**

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**Next Supervision Date:** \_\_\_\_\_

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*AccrediPro Standards Institute Certified Tool Professional Supervision Track | Module 25: Ethical Leadership*

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