

Ethical Leadership & Clinical Supervision Worksheet

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

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?

Supervisor - Feedback/Next Steps for Mentee:

Next Supervision Date: _____

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