



Professional Scope & Boundaries

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Understanding Your Role at Level 0 Foundations

Key Principle: As a Level 0 Foundations credential holder, you have completed educational training in your specialty area. This credential demonstrates foundational knowledge and personal development — it does **not** authorize clinical practice, diagnosis, or treatment.

1 Your Role at Level 0

Level 0 is an educational credential. You are equipped to apply knowledge in your own life, support others informally, and prepare for professional-level certification. This foundational understanding positions you for growth while maintaining clear professional boundaries.

2 What Is Permitted vs. Not Permitted

✓ PERMITTED at Level 0

- Sharing educational information
- Supporting friends and family informally
- Applying knowledge to your own life
- Discussing general concepts
- Referring to qualified professionals
- Participating in learning communities
- Preparing for professional certification

✗ NOT PERMITTED at Level 0

- Charging for services
- Diagnosing conditions
- Creating treatment protocols
- Claiming professional status
- Replacing medical care
- Providing clinical recommendations
- Using "Certified Practitioner" title

3

Understanding the Professional Spectrum

Category	What It Means	Who Does This
Education	Sharing knowledge, concepts, information	Anyone with knowledge
Support	Listening, encouraging, holding space	Friends, mentors, peers
Coaching	Goal-setting, accountability, guidance	Certified coaches (Level 1+)
Therapy	Treating mental health conditions	Licensed therapists only
Clinical Practice	Diagnosing, treating, prescribing	Licensed clinicians only

4

When to Refer

Always refer when you encounter:

- **Medical symptoms** requiring diagnosis or treatment
- **Mental health concerns** such as depression, anxiety, trauma
- **Safety concerns** including self-harm, abuse, crisis situations

- Requests outside your scope — anything requiring professional licensure
- Situations beyond your comfort level — trust your instincts

Remember: Referral is not failure. It is a sign of professional integrity. The most respected practitioners know their limits and build networks of trusted professionals.

5 Professional Language Guide

Safe Phrases to Use

"Based on what I've learned..."

"You might consider exploring..."

"Some people find it helpful to..."

"Have you thought about..."

"From an educational perspective..."

"I can share information about..."

"This is something to discuss with your doctor..."

"I'm not qualified to advise on that, but..."

Never Promise:

- Specific outcomes or results
- Cures or healing
- Diagnosis or clinical assessment
- Replacement for professional care
- Anything you cannot ethically deliver

6 Escalation Protocol

- 1. Recognize** — Notice when a situation exceeds your scope
- 2. Acknowledge** — "This sounds like something that needs professional support"
- 3. Refer** — Provide appropriate resources or professional contacts
- 4. Support** — Continue offering appropriate educational support
- 5. Document** — Keep notes on referrals made (for your own records)

♦ Professional Alignment Statement ♦

By continuing with this credential program, I acknowledge that I have read, understood, and agree to operate within the professional scope and boundaries outlined in this document. I understand that Level 0 is an educational credential and does not authorize clinical practice.

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Document Version 1.0

Effective January 2024

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