1. Introduction

1.1 Introduction

Introduction
Welcome to the University of California’s online Campus Health Professional Boundary training. This course was created for healthcare workers within Student Health Services (SHS) and Counseling and Psychological Services (CAPS).
1.2 Purpose

Purpose

As members of the University of California healthcare workforce, we have a moral and, under HIPAA and other laws, legal responsibility to deliver safe medical care. Maintaining professional boundaries ensures that patients, providers, and all members of the related healthcare organizations are kept safe as services are provided.

Here at the UC, all employees within healthcare organizations related to the institution are required to comply with their obligations under UC policies and guidelines for maintaining healthy professional boundaries.

1.3 How to use
How to use

Before we begin, please note that you can read the information presented (without having to listen to the narrator) at any time by selecting the “Script” tab. To disable the audio, select the sound icon at the bottom.

Also, this is an interactive tutorial. You will often be prompted to select an area, or make a decision, before proceeding to the next section of the course.

If you cannot access content or use features in this training due to a disability or other accessibility-related issue, please complete the Accessibility Needs Request form located in the “Resources” tab of your training player.

1.4 Menu

Menu

In this training, you will learn to define professional boundaries, establish a safety culture, respond to boundary violations, and locate resources for your campus location. To begin, select “Overview”.

![Menu](image_url)
2. Overview

2.1 Objectives

By the end of this section, you will be able to:

- Define professional boundaries
- Classify boundary violations
- Identify who is capable of violating boundaries

Objectives
By the end of this section, you will be able to:

- Define professional boundaries
- Classify boundary violations
- Identify who is capable of violating boundaries
2.2 Professional Boundaries Definition

Professional Boundaries Definition
Whenever a patient enters a clinical space, they are bound to interact with healthcare workers, whether physically, verbally, or in written form. Professional boundaries are the lines separating healthy interactions from unhealthy interactions. These boundaries are supported by consistent behaviors that are intended to protect healthcare providers, patients, and healthcare organizations.

Boundary violations occur when these behaviors or interactions become unhealthy.

2.3 Boundary Violations
Boundary Violations
Boundary violations can be described as behaviors, gestures, or expressions that are disrespectful of a patient or patient privacy.

This can include actions that are sexual or non-sexual in nature, whether they are intentional or not. Select each box to learn more about the different types of boundary violations.

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Sexual (Slide Layer)

Sexual Boundary Violations

Violations may include:
- Inappropriate comments about a patient’s body, clothing, or sexual orientation
- Conducting intimate exams or consultations without clinical justification
- Soliciting a date or romantic relationship
- Sexual violence or harassment

Sexual

Sexual boundary violations may include:
- Inappropriate comments made about a patient’s body, clothing, or sexual orientation
- Conducting intimate exams or consultations without clinical justification
- Soliciting a date or romantic relationship between a healthcare worker and a patient
- Sexual violence or harassment
Non-Sexual Boundary Violations

Violations may include:
• Giving or accepting gifts from patient
• Revealing intimate details
• Intentional contact outside of professional relationship

Non-Sexual
Non-sexual boundary violations often involve behavior that would be appropriate in other contexts, but not in a clinical setting. This may include:
• Giving or accepting gifts from a patient
• Revealing intimate details to a patient
• Intentionally having contact with a patient outside of the professional relationship
Situational
Not all boundary violations are intentional. Sometimes a healthcare worker may act unprofessionally but still have the patient’s best interest in mind. This may lead to situational boundary violations, which are when appropriate relationships and interactions become inappropriate over time.

2.4 Potential Offenders
Potential Offenders
Who is at risk of violating professional boundaries?
Select all that apply.

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Correct (Slide Layer)

Correct
All healthcare providers and personnel are at risk of violating professional boundaries, even if they never intend to. Therefore, it is important to pay attention to behaviors that can potentially lead to unhealthy or inappropriate interactions with patients.

Those who violate professional boundaries are called offenders.

When you’re ready, select “Next” to continue.
2.5 Access, Privacy, and Control

Access, Privacy, and Control

There are three things that someone must have for a boundary violation to occur: access, privacy, and control.

Whenever a healthcare worker possesses these three things in relation to a patient, there is potential for professional boundaries to be crossed.

Select each topic to learn more.

When you’re ready, select “Next” to continue.

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Access
Many healthcare workers have access to patients through in-person communication or patient information. The frequency and duration of this access could lead to either intentional or unintentional boundary violations.

Privacy
Physical or virtual
May lead to intentional or unintentional boundary violations
Makes false allegations difficult to dispute
**Privacy**
Privacy can be physical (e.g., an exam room) or virtual (e.g., electronic communication through social media). Not only can privacy lead to intentional or unintentional boundary violations, it can also make false allegations difficult to dispute.

**Control (Slide Layer)**

**Control**
There is an imbalance of power between healthcare workers and patients. When someone takes advantage of this imbalance to pursue inappropriate interactions with a patient, boundary violations are likely to occur.
2.6 Summary

Summary
In summary, you should now be able to:
• Define professional boundaries
• Classify boundary violations
• Identify who is capable of violating boundaries
3. Establishing A Safety Culture

3.1 Objectives

Objectives
By the end of this section, you will be able to:
• Identify types of inappropriate behavior
• Distinguish boundary-crossing behaviors
• Apply best practices for patient-related interactions

3.2 Appropriate vs. Inappropriate Behaviors

If not addressed, they may lead to misconduct.

Most boundary violations begin as minor behaviors that become increasingly inappropriate.
**Appropriate vs. Inappropriate Behaviors**
Most boundary violations begin as minor inappropriate behaviors or blurred lines between appropriate and inappropriate conduct with patients. These should be viewed as warning signs that a staff member is in danger of crossing a professional boundary. Addressing these behaviors as soon as possible is key in preventing boundary violations. If not addressed, they may become increasingly inappropriate and lead to misconduct.

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**3.3 Types of Inappropriate Behavior**

Types of Inappropriate Behavior
Boundary violation warning behaviors can appear in many different ways. To learn more about the most common types of warning behaviors to look out for when observing or engaging in patient-related interactions, select each topic below.

When you are ready, select “Next” to continue.

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Romantic or Sexual Contact (Slide Layer)

Types of Inappropriate Behavior

Romantic or Sexual Contact
- Flirting, dating, or any forms of sexual intimacy

Romantic or Sexual Contact
- Flirting, dating, or any forms of sexual intimacy
Personal Connections

- Connecting with a patient via social media or sharing personal contact information such as personal email or phone number
- Doing special favors for a patient
Incomplete Medical Record Documentation (Slide Layer)

Types of Inappropriate Behavior

Incomplete Medical Record Documentation
- Withholding or deliberately neglecting to appropriately document medical information about a patient

Incomplete Medical Record Documentation

Unprofessional Communication (Slide Layer)

Types of Inappropriate Behavior

Unprofessional Communication
- Socializing with a patient outside of the professional environment, whether physically or virtually
- Use of perverse, foul, or otherwise unprofessional language in secure messaging
Unprofessional Socialization
• Socializing with a patient outside of the professional environment, whether physically or virtually
• Use of perverse, foul, or otherwise unprofessional language in secure messaging

Inappropriate Self-Disclosure (Slide Layer)

Inappropriate Self-Disclosure
• Sharing intimate details with a patient regarding personal life issues with no clinical rational or purpose
Financial Involvement (Slide Layer)

**Types of Inappropriate Behavior**

Financial Involvement

- Engaging in any financial transactions with a patient outside of payment for professional services
- Giving or receiving gifts from a patient

**Financial Involvement**

- Engaging in any financial transactions with a patient outside of payment for professional services
- Giving or receiving gifts from a patient
3.4 Situational Discernment

Situational Discernment
While exceptional situations may arise where it might be appropriate to cross a professional boundary, it is impossible to predict exactly which actions will lead to misconduct later on in the patient-provider relationship. So, it is important to recognize and address even the mildest forms of boundary violations whenever possible.

3.5 Elements to Consider

Elements to Consider
To determine if a behavior is crossing a professional boundary, consider the situation alongside the following elements.

Select each checkbox to learn more.

- Examine Actions:
- Consider Patient:
- Perceive Relationship:
- Imagine Outcomes:
Elements to Consider
To determine if a behavior is crossing a professional boundary, consider the situation alongside the following elements.

Select each checkbox to learn more.

When you’re ready, select “Next” to continue.

Examine Actions
• Carefully examine your own motives beliefs, words, and actions. Remember to seek objective insights from others by asking for feedback from supervisors and peers.

Consider Patient
• Consider how the patient likely views the relationship. You may do this through observation, discussions with the patient’s healthcare providers, or by reviewing documentation.

Perceive Relationship
• Think about how others would view the relationship.

Imagine Outcomes
• Imagine the outcomes that will most likely result from the current patient-provider or coworker-to-coworker relationship. Is this outcome desirable or undesirable? Is this the best possible outcome for everyone involved?

3.6 Knowledge Check

Consider each of the following scenarios. Select “Yes” if the healthcare worker is showing warning signs of violating boundaries.

Knowledge Check
Consider each of the following scenarios. Select “Yes” if the healthcare worker is showing warning signs of violating boundaries.
Incorrect (Slide Layer)

Knowledge Check

Consider each of the following scenarios. Select “Yes” if the healthcare worker is showing warning signs of violating boundaries.

A lab technician agrees to withhold information from a patient's lab results in exchange for a favor from the patient.

Is this a warning sign?

That is incorrect. Please try again.

Incorrect
That is incorrect. Please try again.
Correct (Medical Assistant) (Slide Layer)

That is correct. The medical assistant is engaging in romantic contact with the patient. This is a warning sign.

Select “Continue” to proceed.

Question (Support Staff) (Slide Layer)
**Question (Support Staff)**
A clinical support staff member uses professional language when communicating with a patient.
Is this a warning sign? Yes or no?

**Correct (Support Staff) (Slide Layer)**

**Correct (Support Staff)**
That is correct. The clinical support staff member is maintaining professional communication with the patient. This is not a warning sign.
Select “Continue” to proceed.
Question (Counselor) (Slide Layer)

Knowledge Check

Consider each of the following scenarios. Select “Yes” if the healthcare worker is showing warning signs of violating boundaries.

A counselor shares intimate details about their marital struggles during a counseling session with a patient.

Is this a warning sign? Yes or no?

Question (Counselor)

A counselor shares intimate details about their marital struggles during a counseling session with a patient.

Is this a warning sign? Yes or no?
Correct (Counselor) (Slide Layer)

Knowledge Check
Consider each of the following scenarios. Select “Yes” if the healthcare worker is showing warning signs of violating boundaries.

A counselor shares intimate details about their marital struggles during a counseling session with a patient.

Is this a warning sign?
That is correct. The counselor is engaging in inappropriate self-disclosure.

Correct (Counselor)
That is correct. The counselor is engaging in inappropriate self-disclosure. This is a warning sign.
Select “Continue” to proceed.

3.7 Educate and Communicate
**Educate and Communicate**
Communication is key to the establishment of safety culture in your workplace. It is important for everyone to be educated about what professional boundaries are, and how they are expected to behave. This may be done through written policies, workplace training, professional development, or one-on-one conversations.

3.8 Boundary Maintenance Practices

**Boundary Maintenance Practices**
Here are some best practices that healthcare workers should apply to ensure that they are upholding healthy boundaries.

To learn more about each practice, select the topics below.

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**Self-Care**
The most important first step toward building and maintaining healthy professional boundaries is taking care of yourself.

**Support**
It can be difficult for healthcare providers to impartially evaluate their own behaviors. Supervisors can assess your interactions and provide feedback about any warning signs you may have missed. It is also
important to remember that other healthcare workers in your community are experiencing similar issues. Seek out regular meetings with your peers to exchange ideas and discuss experiences.

**Reflection**
Thinking critically about your actions on a regular basis allows you to see trends in your behavior and attitudes that could otherwise get overlooked in everyday occurrences. This will help you to prevent boundary violations that could harm patients and yourself.

### 3.9 Behavioral Guidelines

**Behavioral Guidelines**
Remember, boundary violations are harmful to those involved, as well as those surrounding them. Even if you do not have direct contact with patients, you have a responsibility as a member of the healthcare system to help maintain a culture of safety.

If you suspect that you, or anyone else in your workplace is in danger of violating a professional boundary, it is best to seek guidance from your supervisor as soon as possible.
3.10 Summary

Summary

In summary, you should now be able to:
• Identify types of inappropriate behavior
• Distinguish boundary-crossing behaviors
• Apply best practices for patient-related interactions

4. Reporting Procedures

4.1 Objectives

By the end of this section, you will be able to:
• Recognize your role as a healthcare worker
• Respond to boundary violations
• Recognize legal reporting requirements
Objectives
By the end of this section, you will be able to:
• Recognize your role as a healthcare worker
• Respond to boundary violations
• Recognize legal reporting requirements

4.2 Roles & Responsibilities

Roles & Responsibilities
As a healthcare worker, you are an advocate for those who receive care from your facility as well as those who contribute to the delivery of that care. It is your responsibility to help maintain a culture of safety in your organization. This includes recognizing and addressing inappropriate behaviors before they become boundary violations.

Due to the power dynamic between patients and healthcare workers, you may be held liable for any boundary violations, even if a patient initiated the contact. Therefore, it is in everyone’s best interest to understand and maintain healthy boundaries.
4.3 Address Inappropriate Behavior

There are five steps you can take to address inappropriate behavior.

Select each number to see the steps.

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Address the Offender(s)
Do not allow the behavior to continue without being addressed.

Identify the Concern
Specify the exact part(s) of the behavior that are harmful.

Explain Why
Explain why the behavior is inappropriate.

Stop and Redirect Behavior
Stop the inappropriate behavior from reoccurring and engage in more appropriate actions.

Report Incident
If necessary, notify your supervisor, state authorities, licensing boards, and/or local law enforcement and complete an official incident report.

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Spectrum of Responses

Remember, although unprofessional behavior should be avoided whenever possible, exceptional situations may arise where it might be appropriate to cross a professional boundary. Therefore, your responses may vary depending on the situations that you may encounter. Not every situation will require that you use all five steps, but your response will most likely fit within the range from documenting the incident to the termination of employment for the personnel involved.
4.4 Mandated Reporting

Mandated Reporting

In the state of California, all healthcare providers are legally mandated to report suspected or confirmed abuse as soon as they know or suspect that it has occurred.

Remember that you have a responsibility to recognize and respond to inappropriate behavior, regardless of how much contact you may have with the victim. You are not required to actually witness abuse prior to reporting it to the authorities.

Mandated reporting requirements include children up to the age of 18, dependent adults between the ages of 18 and 64, and elder adults over the age of 64.

4.5 How to Report
How to Report
Call the Police Department for cases of assault or if there is immediate danger of abuse.
Reports must be made immediately after observing or forming a reasonable suspicion of abuse, or as soon as practically possible, by phone.

4.6 File an External Report

File an External Report
To submit an external report, you must:

1. Call by Phone
Call your campus Title IX office to report an incident as soon as possible.

2. Submit a written report
Complete and submit an online reporting form as soon as possible to document the incident and begin the official response process.
4.7 Submit Internal Report

Submit Internal Report
To submit an internal report, you must do one of the following:

- Call the Title IX Office for your location
- Submit an online reporting form
- Contact your supervisor to submit a report

Please Note: There is no time limit for reporting, and people should report incidents even if significant time has passed.
4.8 UC Reporting Guidelines

UC Reporting Guidelines
The University of California encourages all members of the healthcare environment to report observed or suspected misconduct – even those who are not mandated reporters.

You can contact your campus Title IX Office or make an internal report to your supervisor.

Supervisors, senior administrators, and other University personnel must forward reports to the Title IX Office for your location.

4.9 Summary
Summary
In summary, you should now be able to:
• Recognize your role as a healthcare worker
• Respond to boundary violations
• Recognize legal reporting requirements

5. Resources

5.1 Objectives

By the end of this section, you will be able to:
• Apply campus and system-wide policies
• Locate additional resources for your location

Objectives
By the end of this section, you will be able to:
• Apply campus and system-wide policies
• Locate additional resources for your location
5.2 System-Wide Policies

System-wide Policies
Select any box to access additional resources:

- UC Sexual Violence Sexual Harassment Policy
- UC Statement of Ethical Values and Standards of Ethical Conduct
- UC Clery Act Policy - Campus Safety and Security Reporting
- Child Abuse and Neglect Reporting Act (P.C. 11164-11174.4)

When you’re ready, select Next to move on to the next section of the training.
5.3 Location

Location
For more site-specific information, select your campus or location.

5.4 Davis

For more information, consult your Title IX Office.

Title IX Office
(530) 752-1011

CARE Advocate
(530) 752-3299

Police Department: (911) or
(530) 752-1230

UC Davis Sexual Violence and Sexual Harassment Policy
Davis
For more information, consult your Title IX Office. You may also contact Police or your local CARE Advocate.

When you’re ready, select “next” to continue.

5.5 Berkeley

Berkeley
For more information, consult your Title IX Office. You may also contact Police or your local CARE Advocate.

When you’re ready, select “next” to continue.
Irvine

For more information, consult your Title IX Office. You may also contact Police or your local CARE Advocate.

When you’re ready, select “next” to continue.
5.7 San Diego

San Diego
For more information, consult your Title IX Office. You may also contact Police or your local CARE Advocate.

When you’re ready, select “next” to continue.

5.8 Riverside
Riverside
For more information, consult your Title IX Office. You may also contact Police or your local CARE Advocate.

When you’re ready, select “next” to continue.

5.9 LBNL

For more information, consult your Title IX Office. You may also contact Police or your local CARE Advocate.

When you’re ready, select “next” to continue.

LBNL
For more information, consult your Title IX Office. You may also contact Police or your local CARE Advocate.

When you’re ready, select “next” to continue.
5.10 Merced

Merced
For more information, consult your Title IX Office. You may also contact Police or your local CARE Advocate.

When you’re ready, select “next” to continue.
5.11 Los Angeles

Los Angeles
For more information, consult your Title IX Office. You may also contact Police or your local CARE Advocate.

When you’re ready, select “next” to continue.

5.12 San Francisco
San Francisco
For more information, consult your Title IX Office. You may also contact Police or your local CARE Advocate.

When you’re ready, select “next” to continue.

5.13 ANR

For more information, consult your Title IX Office. You may also contact Police or your local CARE Advocate.

When you’re ready, select “next” to continue.
5.14 Santa Cruz

For more information, view CANRA resources at your location. Or Contact Police or your Ethics & Compliance Officer

When you are ready, select “next” to continue.
5.15 Santa Barbara

Santa Barbara
For more information, consult your Title IX Office. You may also contact Police or your local CARE Advocate.

When you’re ready, select “next” to continue.

5.16 Summary

To Do:
- Apply campus and system-wide policies
- Locate additional resources for your location
Summary
In summary, you should now be able to:
• Apply campus and system-wide policies
• Locate additional resources for your location

6. Conclusion

6.1 Summary

Summary
There is a shared responsibility among healthcare workers to deliver safe and quality care. You should now be able to define professional boundaries, establish safety culture, respond to boundary violations, and locate additional resources for your location.
6.2 For More Information

More Information

For more information, please contact your local Title IX Office. To receive credit for this course, you must complete the test. When you’re ready, proceed to take test.
6.3 Question 1
(Multiple Choice, 10 points, 1 attempt permitted)

Question 1
What are professional boundaries? Select the best response.
- The dividers between different healthcare facilities
- The lines between healthy and unhealthy interactions
- The differences between doctors and nurses
- The lines between verbal and written interactions

Correct (Slide Layer)
Feedback when correct:
That's correct! Professional boundaries are the lines separating healthy interactions from unhealthy interactions and are supported by consistent behaviors.

Incorrect (Slide Layer)

Feedback when incorrect:
That is incorrect. Professional boundaries are the lines separating healthy interactions from unhealthy interactions and are supported by consistent behaviors.
6.4 Question 2
(Multiple Response, 10 points, 1 attempt permitted)

Select each scenario where a healthcare worker is showing warning signs of violating a boundary.

- A medical assistant jokes about taking a patient on a date while chaperoning their intimate exam.
- A clinical support staff member uses professional language when communicating with a patient.
- A counselor shares intimate details about their marital struggles during a counseling session with a patient.
- A receptionist is interacting with a patient on their personal social media account.

Question 2
Select each scenario where a healthcare worker is showing warning signs of violating a boundary.

- A medical assistant jokes about taking a patient on a date while chaperoning their intimate exam.
- A clinical support staff member uses professional language when communicating with a patient.
- A counselor shares intimate details about their marital struggles during a counseling session with a patient.
- A receptionist is interacting with a patient on their personal social media account.
Correct (Slide Layer)

Select each scenario where a healthcare worker is showing warning signs of violating a boundary.

- A medical assistant is having a conversation with a patient while showering.
- A clinical staff member is communication with a patient.
- A counselor is exploring a patient's personal life outside of the counseling session.
- A receptionist is interacting with a patient on their personal social media account.

Feedback when correct:
That’s correct! Romantic contact, inappropriate self-disclosure, and personal connections are all warning signs of professional boundary violations.
Incorrect (Slide Layer)

Select each scenario where a healthcare worker is showing warning signs of violating a boundary.

- A medical professional is having a conversation with a patient that is inappropriate.
- A clinical professional is engaging in a counseling session with a patient and it is not professional.
- A counselor is interacting with a patient on their personal social media account.
- A receptionist is interacting with a patient on their personal social media account.

Feedback when incorrect:
That is incorrect. Romantic contact, inappropriate self-disclosure, and personal connections are all warning signs of professional boundary violations.
6.5 Question 3
(Multiple Choice, 10 points, 1 attempt permitted)

How should you respond to inappropriate behavior?
Select the best response.

- Encourage the behavior
- Address the behavior
- Ignore the behavior
- Blame it on the patient

Question 3
That is incorrect. Romantic contact, inappropriate self-disclosure, and personal connections are all warning signs of professional boundary violations.
- Encourage the behavior
- Address the behavior
- Ignore the behavior
- Blame it on the patient
Feedback when correct:
That's correct! As a healthcare worker, you have a responsibility to address inappropriate behavior whenever possible.
Incorrect (Slide Layer)

Feedback when incorrect:
That is incorrect. As a healthcare worker, you have a responsibility to address inappropriate behavior whenever possible.
6.6 Question 4  
(Multiple Choice, 10 points, 1 attempt permitted)

To determine if a behavior is acceptable, you must Examine Actions, Consider Patient, Perceive Relationship, and _______. Select the best response.

- Change Worksites
- Consider Finances
- Discuss Feelings
- Imagine Outcomes

Question 4
To determine if a behavior is acceptable, you must Examine Actions, Consider Patient, Perceive Relationship, and _______. Select the best response.

- Change Worksites
- Consider Finances
- Discuss Feelings
- Imagine Outcomes
Correct (Slide Layer)

Feedback when correct:
That's correct! To determine if a behavior is acceptable, you must Examine Actions, Consider Patient, Perceive Relationship, and Imagine Outcomes.
Incorrect (Slide Layer)

Feedback when incorrect:
That is incorrect. To determine if a behavior is acceptable, you must Examine Actions, Consider Patient, Perceive Relationship, and Imagine Outcomes.
6.7 Question 5
(Multiple Response, 10 points, 1 attempt permitted)

What should you do to report misconduct? Select all that apply.
- Call Title IX Office
- Discuss it with your peers
- Submit online reporting form
- Contact your supervisor

Question 5
That is incorrect. To determine if a behavior is acceptable, you must Examine Actions, Consider Patient, Perceive Relationship, and Imagine Outcomes.

- Call Title IX Office
- Discuss it with your peers
- Submit online reporting form
- Contact your supervisor
Correct (Slide Layer)

**Feedback when correct:**
That's correct! You should call your Title IX Office, submit an online reporting form, or notify your supervisor to report misconduct.
Incorrect (Slide Layer)

When incorrect:
That is incorrect. You should call your Title IX Office, submit an online reporting form, or notify your supervisor to report misconduct.
Summary
Thank you for taking the Campus Health Professional Boundary training. If you have time, please evaluate the course. Select “Finish” when you are done.
Success (Slide Layer)

Success
Congratulations, you passed. Thank you for taking the Campus Health Professional Boundary training. If you have time, please evaluate the course. Select “Finish” when you are done.
Failure (Slide Layer)

Results

Your Score: 0% (0 points)
Passing Score: 0% (0 points)

Result:
× You did not pass.

Retry Test  Exit

Failure
Un fortunately, you did not pass. Select “Retry Test” to try again.