The Center for Family Therapy
Training Facility of the Graduate Program in Couples and Family Therapy
University of Oregon
College of Education

POLICIES AND PROCEDURES

2014-2015
Welcome to the Center for Family Therapy!

The Center for Family Therapy is a member of the HEDCO Clinic, a multidisciplinary training clinic of the College of Education at the University of Oregon. The Center for Family Therapy is the training clinic for the Couples and Family Therapy (CFT) program. The CFT program is nationally accredited by the Commission on Accreditation for Couples and Family Therapy Education. Across their program of students, students take 90 graduate credits, two comprehensive exams and at least 400 client contact hours with at least a 5:1 client contact to supervision ratio.

The clinic provides affordable, high quality services using innovative team-based practices. Students are trained to work from a systemic and ecological theoretical framework and incorporate specific research outcomes, common factors, client motivational readiness and a strengths-based orientation in their practice.

The Center for Family Therapy works with a wide-variety of client presenting issues. Clients who need and will likely benefit from crisis services, hospitalization or other inpatient care and medication management may be referred accordingly. Clinic interns are supervised by CFT program faculty, AAMFT-Approved supervisors and Supervision Instructors. In 2013, the clinic provided more than 4,300 client contact hours to citizens in the greater Eugene-Springfield area.

Three primary projects underway at the clinic that will continue into the 2014-15 academic year include:

1. A marketing campaign to increase Center for Family Therapy name and product recognition specifically focusing on couple and family therapy and diverse populations.
2. An increase in the utilization of standardized assessments to measure clinical effectiveness at the clinic.

In addition, individual faculty and student research projects continue on an ongoing basis.

This handbook is designed to familiarize you with the policies and protocols at the CFT and the HEDCO clinic. Please review it carefully, sign the “Acknowledgement of Receipt” (last page of manual), and return that signed form to the HEDCO Clinic Manager. We will discuss your questions in Advanced Practicum and throughout the coming year in monthly clinic meetings.

The CFT faculty and staff are excited to work with you. Welcome!
HEDCO Clinic
Center for Family Therapy
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Clinical Supervisors:

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HEDCO Clinic Administrative Staff:

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**Access**

- **Hours of Operation**
  The clinic is open for services Monday through Thursday, 9:00am to 8:00pm (doors will open at 8:30am and be locked after the last session begins*) and Friday from 9:00am to 7:00pm. No clinical services may be conducted outside of these hours, including on weekends. The clinic is not available to clinical interns to see clients afterhours, on weekends, or during holiday or break closures.
  *On days when there are no late appointments, the clinic will close at 5:00pm or after the last appointment arrives, whichever is later.

- **Holidays and Clinic Closures**
  The clinic will be closed for all University holidays (New Year’s Day, Martin Luther King, Jr. Day, Memorial Day, Independence Day, Labor Day, Thanksgiving and day after Thanksgiving, Christmas Eve, and Christmas)
  The clinic will be closed between terms on the following schedule (2014-15):
  - Spring/Summer interim – one week closure
  - Summer/Fall interim – one week closure
  - Winter Break – two week closure
  - Spring Break – one week closure
  Hazardous Weather – We follow the 4J school and office closures. Hazardous Weather details are below and handouts are always available for clients at the front desk. Keep in mind a clinic closure does not mean a UO closure or cancellation of your classes.

  **Inclement Weather Details:**
  - Clinicians will inform their clients of our weather policy so that clients will know how to find out about possible closures.
  - The clinic will follow the 4-J schools regarding delays and closures due to snow, ice, and other inclement weather. If 4J closes, the HEDCO Clinic will not be seeing clients and the front desk staff will not be working.
  - Clients are not called by clinic staff for weather related closures. You may call your client, if you are uncertain they know our weather procedures. In rare instances, you may ask management to call a client for you. However since there is no guarantee that management will be able to get to the office, it is best to prepare your clients to check and see if we are open.
  - CDS clients will attend their next regularly scheduled session following the closure.
  - CFT clients will be called by their clinician to schedule their next session when the clinic reopens.
  - Clinic voicemail will be changed by 7:30 am to reflect clinic closure.
  - Clinic staff will be notified by email of clinic closure.
  - In the case of a delay in opening, the HEDCO Clinic will not delay clinic appointment times. Appointments scheduled prior to the delayed start time will be cancelled and all other appointment will remain on time.
  - Remind your clients that they may call the clinic and listen to the phone message to see if we are open. Additionally, if they hear that 4J schools are closed due to weather, the clinic will also be closed.

- **Key Cards /Code Locks**
  The clinic is equipped with key card access on entry doors and interior entrances to sensitive areas. Clinic staff will have privileges added to UO ID cards which will enable access to locked clinic entrances. ID cards must be kept at all times for entrance into locked areas. The records room door is on a separate code lock system. If you lose your key card, you must notify the clinic manager ASAP.

- **ID Badges**
  For the purposes of identifying clinic staff from clients or other visitors, all clinic staff will be required to wear an ID badge while working in the clinic at all times. ID badges will be provided by the clinic. Interns will be responsible for fees to replace lost badges (clip and badge). ID badges must be returned prior to completion of program or termination of employment. Temporary ID badges will be issued to authorized clinic visitors (undergraduate interns, service personnel, etc.) so they may be easily identifiable to other clinic staff.

- **Weekend Use of Clinic**
  - Therapists may use the clinic on the weekends for completing paperwork, working on client/clinic related projects, and/or watching client videos. Non-clinic related work must be done outside of the clinic.
  - Weekend use is for interns only. No clients, guests, or family members may be in the clinic.
  - Therapists will be responsible for locking the file cabinets once they have re-returned their client files.
  - Weekend use is not for returning client phone calls, as there is not a faculty supervisor on call during this time.
Therapist Message Boxes
All interns will have a message box located in the clinic records room (175). The box is used for messages and mail. A separate folder is housed with the intern’s client files for the purpose of receiving and storing new client assignments. Interns must check their messages at least once a day.

Message Procedures
- New messages will be placed in the mail box for each intern and an email will be sent as notification you have a message.
- Interns may check messages in person or ask the desk staff to relay messages if time and confidentiality allow (i.e., no clients in lobby).
- The desk staff will call interns for same-day appointment cancellations and emergency messages only.

Assigning Clients, Rotation, and Intake
Clients are assigned to interns on a rotational basis as inquiries are received. An Intern-Client Assignment Card Catalog is maintained at the front desk. After an intern has been assigned a client, the intern’s assignment card will then be placed at the back of the assignment order with the sequence repeating. Typically, clients will be assigned to the next available therapist within 24 hours of the initial call. New clients should be contacted by the assigned therapist to schedule an appointment within 48 hours of the initial call.

Client Assignment Procedures
- After a client contacts the clinic and completes a telephone questionnaire the client will be assigned to the next available therapist in rotation. Exceptions: a client requests a therapist by name or has a history of trauma and requests a therapist by gender.
- Interns are assigned clients in order of rotation. After a client has been assigned, the client code is written on the appropriate card and it is placed in the back of rotation. Therapists are informed they have new intakes, by email and telephone, if possible.
- High-risk intakes are reviewed by the Clinic Director prior to assignment to determine if a client is appropriate for the clinic.

Rotation Procedures
- Each therapist will have two rotation cards – one for individual clients and one for relational clients.
- Therapists may choose to remove themselves from rotation by placing both their Individual and Relational cards behind the “No Clients” section. Upon accepting clients again, both the Individual and Relational cards should be placed into the back of the appropriate section. Interns may also be taken out of rotation by direct request of the individual supervisor for the intern or by the Clinic Director.
- Therapists may not be selective about the clients assigned to them. Students are not allowed to give an intake to another clinician without speaking directly to a supervisor first. A therapist may be either in rotation and accepting any clients assigned, or out of rotation. The Clinic Director may decide to alter the rotation system to meet the clinic load needs of the clinic as a whole. This may include a “relational-only” rotation where students can choose to only accept couple and family intakes (see below).
- If on vacation, therapists should place a note stating “Vacation” and the expected date of return on their cards. This will notify desk staff that the intern is temporarily not accepting clients during that time. If the card comes up in rotation during the absence, the card will remain at the front of the rotation and the intern will be assigned the first client upon return.
- If a therapist receives a “non-viable” intake then the therapist may return to the front of rotation and receive a new intake. A non-viable intake is defined as, 1) the therapist never speaks to the client due to a disconnected or incorrect telephone number, 2) the client never returns therapist’s calls, or 3) the client decides not to schedule a first appointment. Therapists should make three attempts to contact the client within two weeks of receiving an intake. Non-viable intakes should be placed in the “inactive intakes” folder in the admin drawer in file cabinet “CFT2”.

Relational Only Rotation: Each year around the end of January, the clinical director will gather data as to how many relational clients interns currently have and how many relational hours have been obtained to date. Based on this data, it will be decided when a relational only rotation will begin. Typically, this rotation will begin at the end of February/early March. This rotation is for interns to obtain relational only intakes. To be in this rotation, interns must currently have less than three active relational clients.

Intake Procedures
- Telephone Questionnaire: After completion, the Telephone Questionnaire form will be placed in the intern’s intake folder. The intake form should remain in the intern’s intake folder until the first session is complete and the client file is created.
- Intake Session: The intern should instruct clients to arrive 30 minutes early to their first session in order to complete paperwork. The desk staff will administer all paperwork and will provide it to the intern in a yellow folder.
when complete. This folder will also include blank Informed Consent and Beneficial Services forms, which need to be reviewed and signed in session.

- After Intake Session: The intern should return the yellow folder and its contents to the desk staff for data entry. If the desk staff is not available, the yellow folder can be placed in the Data Entry folder the Terminated Files and Data Entry drawer in the CFT file cabinet in the records room. The paperwork will be returned to the intern after data entry has been completed.

Scheduling and Making Calls
All therapy sessions at the clinic are by prior appointment. Appointments may be scheduled during authorized clinic operational hours and in designated CFT treatment rooms only. Therapists should use designated clinic telephones to place calls to clients. Use of cell phones or calls made from non-secure locations is prohibited. All appointments must be recorded immediately in the clinic scheduling system.

Procedures for Seeing Clients

Scheduling
- The clinic utilizes an electronic scheduling system, Titanium. Interns will receive an orientation and training on this system.
- Interns are responsible for scheduling and canceling their own appointments. If sick, interns may obtain client phone numbers from the desk staff on duty; however, interns must make all cancellation/rescheduling calls personally unless physically incapable of doing so. Interns should contact their supervisor in such cases.
- The scheduling system is shared by all clinicians at the HEDCO clinic. Interns are not authorized to alter or move appointments that are not their own.
- The CFT program is allotted a specific number of treatment rooms each term, marked with a light green placeholder. Interns are not allowed to schedule appointments in treatment rooms designated for another clinic.
- If there are no CFT rooms available, you may ask clinic management if another room is available.
- Appointments may be scheduled no more than four weeks in advance.
- Sessions need to be scheduled on the hour. If you are unable to do this, ask the clinic manager if an exception can be made to schedule on the half hour.

Titanium Checklist
- CFT interns must enter appointments into Titanium right after making the appointment to ensure therapy room and front desk staffing will be available. Entering appointments into Titanium also enables desk staff to assist clients who call in checking their appointment times, as well as prepare OQ questionnaires or Intakes for the appointments. Refer to the Clinician Instructions –Titanium Schedule for detailed instructions. Include the following information on all appointments:
  o Client code
  o Therapist – add yourself to the Scheduling tab
  o Relational sessions will need all clients added – Client tab.
  o Note any fee changes in Titanium
    ▪ If fee is reduced, include the start and stop date of the reduced fee.

Confirming Appointment Times
- The desk staff is authorized to confirm with clients same-day appointments only. Clients will be asked to confirm personal information to confirm they are a member of the client system before appointment information will be released over the telephone.

Client Cancelled Sessions
- The desk staff will call interns if a client cancels the same day of the appointment time. Calls are not routinely made for cancellations with longer notice.
- When a client cancels through the front desk, the desk staff will indicate the cancellation in the scheduling system. If the client communicates the cancellation directly to the intern, then it is the intern’s responsibility to update the scheduling system.

Therapist Cancelled Sessions
- Therapists may cancel appointments due to emergency, sickness, etc.
- Therapists will contact their supervisor or clinic director and provide the following information.
  o Dates of absence and expected date of return
  o Clarify if client appointments have been cancelled or if they need to be
  o Clarify if the cancellation has been noted in Titanium and clinic management/desk staff has been notified.
  o If a client asks why the appointment was cancelled, what may we share with them?
  o Can we contact you by phone or email?
**Session Times**
- Sessions begin on the hour and run 50 minutes in length. If a longer session is needed, or a session on the half hour, clinic manager approval must be obtained prior to scheduling.
- The CFT appointments do not operate on a staggered schedule as some physician’s offices do. If a session starts late, it should still end on time. If one session runs long, subsequent sessions will be cut short to return to the schedule.
- No session should continue past 7:50 pm on Monday-Thursday evenings or 6:50pm on Friday evenings. The clinic closes at 8:00 pm Monday through Thursday and at 7:00pm on Friday.
- Students can schedule live sessions as part of their practicum course. Live sessions are to be scheduled in Titanium as typical sessions are scheduled. The only difference is to schedule in the practicum classroom for live sessions (room 188).

**Client Flow**
- Ten minutes prior to the hour of the appointment, therapists may check the room, adjusting furniture and blinds as needed, and setting up the recording system.
- Once clients are indicated as present via Titanium, therapists are to greet clients in the waiting room and bring back to the therapy room.
- At the end of the session, therapists are to walk their clients to the scheduling counter near the back exit. At this time, confirm the next scheduled appointment before the client exits the building.
- If you moved any chairs out of the room or brought in any additional chairs or materials, please return them to where they belong immediately following your session.
- Log out of recording equipment.

**Late Session Procedure**
- When the room you are scheduled for has a session running overtime that is from the same program (CFT), you may knock on the door at 55 minutes past the hour. When the late session is run by a different program (CDS), therapists need to report the issue to clinic management. The management team will knock on the door for you and in some circumstances may assign you to another room.
- On rare occasions, you may have a session that runs over due to an urgent situation. If you receive a knock on your room door, please come to the door and let the clinic staff/therapist know of your situation so that they may plan accordingly.

**Post-session**
- Interns are responsible for leaving the therapy rooms in a clean and orderly state, including attending to spills and play-therapy set-ups. If repairs are needed, interns should inform the Clinic Manager so they can be addressed.
- All supplies should be returned to the appropriate storage after sessions are complete.
- All artwork created during session must be removed from the therapy room (to be filed or shredded), and any notes written on the white boards should be erased.
- Each room is supplied with a small whiteboard. White boards may be removed from session rooms if there is not time to copy down the information posted (e.g., genograms) before the next session. They should be returned as soon as possible so other interns may use them during their sessions. Larger whiteboards are available in the closet 180D. White boards should be erased and returned to the closet following your session.

**Call Making Procedures**

**Local Calls**
- For general calls and for clients that accept blocked calls –
  - Pick up receiver
  - Dial #71 to block the telephone number (prevents number from being released on caller ID)
  - Dial 9 to get an outside line
  - Dial area code and telephone number

- For clients who do not accept blocked calls –
  - Wait until the “6-0923” button on the right hand side of the telephone is available (i.e., no green lights lit). This button gives the appearance that the call is being placed from the front desk phone. Only the main clinic telephone number will appear on caller ID.
  - Pick up receiver and press the “6-0923” button.
  - Dial 9 to get an outside line.
  - Dial area code and telephone number
Long Distance Calls
- Use the option for blocked or unblocked calls listed above that is appropriate for the call.
- Dial 9 to get an outside line.
- Dial 1 + area code and telephone number
- After beep enter long distance code program for CFT (5265316)
- The clinic is charged for all long distance calls. Interns should use a calling card when making personal calls.
- The long distance code is also needed when faxing long-distance (code is posted on fax machine).

Using Front Office Phones
- Client calls made from the front desk area should be avoided due to confidentiality concerns.
- If a client calls the main line while an intern is in the clinic, the desk staff can transfer the call back to the student/observation room phone.

Notes About Making Calls
- Be sure to make a note in the client file that you called the client or if the client calls you. All client contact must be documented in the contact sheet in the file.
- Please confirm that the person you are talking to is the client before stating who you are for confidentiality.

Out-of Office Client Contacts
As a general rule, all contacts between the intern and client are restricted to scheduled times in the CFT. Exceptions to this rule (such as informal out-of-office meetings, at home visits, hospital visits, etc.) require prior supervisory permission.

Client Files and Record Maintenance
Interns are responsible for maintaining up-to-date clinical records and demographic information on each client in their care. Appropriate CFT forms should be completed promptly and a copy put in the client’s file. It is the responsibility of the intern to safeguard active client files and to insure the confidentiality of all client records until a client is closed.

Client records (originals and copies) stay in the CFT at all times, with the following exceptions:
- As specifically authorized by a signed release from the client(s) (requires the signature of all individuals 18 years of age or older who attended the sessions). This should be reviewed and co-signed by the supervisor prior to release.
- As part of supervision. All students are required to transport all client material to and from supervision in a locked briefcase or bag – this includes client lists, client progress notes, written assignments based on client material, and all video and audio tapes. Locks and bags are provided in the CFT file cabinet in the records room.

Clinicians will adhere to the following protocols when preparing, handling, and storing client records (records include client files, video recordings, correspondence, supervision notes, and any other information pertaining to a client):
- Clinical records should never be left unattended by the intern. Records should be immediately re-filed after each review
- All confidential client documentation must be completed on the clinic premises. Interns may not save client notes, treatment plans, or other confidential information on any clinic computer or personal laptop hard drive. Interns may temporarily save documents-in-progress to an encrypted flash drive, which must be stored in the clinic at all times and may not be used for other purposes outside the clinic (information on encryption can be obtained from the clinic manager). These documents must be deleted from the encrypted flash drive as soon as they are completed and printed.
- Digital recordings of clients must remain on the secure video network and may not be transported from the clinic, even in encrypted format, unless expressly permitted by a supervisor. Supervisors have access to the video server from their offices, so transportation of video should be a rare occurrence.
- Terminated clients should be promptly closed and appropriately filed.
- Supervisors and the Clinical Director maintain full access to a supervisee’s clinical records at all times.
- All client folders are to be coded to ensure client confidentiality. Client codes (not names) should be used: to identify client files (on file tab); in the master schedule; in intern appointment books; or on any document where client confidentiality is a concern. The client code (assigned at intake) will be comprised of the first two letters of the client’s last name, plus the first two letters of the client’s first name, plus either the letters W (for winter), SP (for spring), SU (for summer) or F (for fall) plus the year services began. Example: If the client name is Jane Doe, and she was seen in the Fall of 2011, the client code would be: DOJA F11.

The clinical director serves as custodian of all terminated or inactive client records. Upon execution of appropriate written releases of information, requests for records by third parties should be made through the clinical director.
Changes in client status and treatment objectives may result in a new client file being created. The following guidelines should be used in consultation with your supervisor to determine if a new client file (and database client record) should be created:
1. If a member of a couple or family client wishes to work on individual goals, then a new file should be created and kept separately from the original.
2. If a couple or family unit changes during therapy due to a break-up, separation, divorce or other major change that results in the exclusion of an adult client member, a new file should be made. A copy of the client questionnaire and a new informed consent (if multiple clients signed original) should be placed in the new file.
3. If a member of a couple client wishes to have individual therapy that still focuses on the couple’s goals, the records for those sessions can remain in the couple’s file. This also applies to a member of a family client seeking individual therapy that focuses on family goals.

Any change in client file type, address, etc. should be recorded on a Data Entry Request form and given to the front desk staff. This includes clients who change file type (ex. couples to individual) or add a file type (individual in addition to couples).

A file may be reopened if it was terminated within the past six months if the clients, client status (individual, couple, family), and presenting problem have not changed. If any of these items have changed, then a new client file (and database client record) should be created. A new informed consent form should be signed by the client.

Client File Procedures

- **File Creation:** Interns are responsible for making their own client files after the intake session has been completed and paperwork has been returned after data entry. File-making materials (folders, hole-punch, and fasteners) are located in the student/observation room storage cabinet. Sample files showing the order of file contents are available in the student room. All client contents must be written in black ink.

- **File Labels:** Using a label maker, interns should create a label to be affixed to the folder tab. The file label consists of the four-letter client code (as assigned at intake), the term initials (F, SP, W or SU) and the year services began. The client code is based on the initials (first two of last name, first two of first name) of the client who completed the telephone intake. This code should not be changed without consultation with the Clinic Manager to ensure database accuracy.

- **File Audit:** Each term clinical supervisors will audit intern files to ensure accuracy of records (both ethically and legally). Supervisors will follow the file audit form and perform an audit at the end of the term. Interns are then required to make necessary changes and adjustments to their client file(s) before they complete the term. During summer term, all client files will be selected for audit. During fall, winter, and spring term, supervisors will choose three files at random for the audit. At the end of every audit period, all files are considered a completed record.

Emergency Sessions

Should an emergency situation requiring immediate response arise, due to high-risk client needs, the intern should consult with their assigned supervisor. (If the intern is unable to reach their supervisor, they should contact the assigned supervisor on call, the clinical director or the program director in that order). The client may be seen at the CFT or referral may be made to the appropriate community resource.

Minor Children in Therapy

All minors in therapy need to have a consent signed by their parent or guardian. If a client is 14 years of age, the client can initiate services without parental consent. It is expected that the therapist will consult with their assigned supervisor and notify the clinical director if this situation arises. If a client initiates services without parental consent, it is assumed that reasonable efforts will be made to include a parent/legal guardian.

When custody of a minor child may be in question due to separation, divorce, or unmarried parent, proof of legal custody is required prior to treatment. Proof may be demonstrated through a parenting plan, divorce decree, custody agreement, separation agreement, or other proof of legal guardianship. A copy of records should be included in the client file. Parental consent forms are available in the student/observation room and front office for obtaining consent for services from the custodial parent.

Guidelines for Removing Children from Therapy Sessions

Therapists should avoid a situation in which children are removed from a therapy session and placed in the clinic waiting room. Alternatives include scheduling a co-therapist for sessions with families or scheduling separate sessions for parents and children. Per HEDCO Clinic policy, no children under the age of twelve should be left in the waiting room at
any time without adult supervision (clinic administrative or front desk staff cannot provide supervision). If adequate adult supervision cannot be found, the children should remain in session or the session should be rescheduled for a time when the children are not present.

**Guidelines for Clients Leaving from or Returning to Therapy Sessions**

Therapists may need to excuse a client from a therapy session for a variety of reasons (e.g., restroom breaks, to allow individual work during a couple or family session, or safety issues with regards to domestic violence). In circumstances where a client must leave a session, please adhere to the following protocol:

1. Therapist will escort the client to the waiting room and provide the desk staff on duty instructions as needed.
2. Therapist will escort the client back to the session room, or, if prior permission to return to session has been granted by the therapist, the desk staff will escort the client back to the session room.
3. No staff will allow a client to return to a session room without prior verbal instruction from the therapist. If a client approaches the desk staff requesting a return to session and no prior consent has been given by the therapist, the desk staff will interrupt session to obtain permission.
4. If a client leaves voluntarily or is excluded from a session due to safety concerns, the therapist will inform the desk staff on duty of the situation so they can be prepared for unusual behavior in the waiting room.

**Fees**

Our services are offered on a sliding scale fee basis, payable at the end of each session. Fees range from $15 to $100, based on a client’s household income. A $15 assessment fee is charged for the first appointment. In client of cancellation, 24-hour notice should be given to avoid a charge for the session (cancellation charge is at therapist’s discretion).

<table>
<thead>
<tr>
<th>Annual Household Income</th>
<th>Fee</th>
<th>Annual Household Income</th>
<th>Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Below $15,000</td>
<td>$15</td>
<td>$55,001 - $60,000</td>
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</tr>
<tr>
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<td>$95,001 - $100,000</td>
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</tr>
</tbody>
</table>

**Payment Procedures**

- **Fees**: Interns determine client fee based on sliding fee scale or negotiated rate
- **Reporting the Assessed Fee**: Interns report the assessed fee on the Informed Consent form. Desk staff will enter the fee information into the scheduling and billing system. Any changes in fees should be reported to the desk staff on duty so the information can be updated in the scheduling and billing system.
- **Payments**:
  - The desk staff will process payment from the client before each session, charging the fee currently on file in the scheduling and billing system. If a client fails to pay for a session, the desk staff will inform the intern by providing them a payment notification slip.
  - Clients may skip a payment as long as the intern makes record of this with the desk staff and arranges future payment.
  - The intern is responsible for noting payment changes or discounted sessions in Titanium or asking the desk staff to note the change for them in Titanium. Payment changes and discounts should include start dates and end dates, if applicable. This information will ensure your clients are charged the agreed upon amount.
  - The clinic does not accept pre-payment for services.

**Billing**

While it is the policy of the center that arrangements be made for full payment for services rendered at the time of each visit, the clinic does have a mechanism for billing clients or a third party if necessary. Billing statements will be printed once per month. Your client’s statements will be placed in your mailbox and you will be responsible for giving them to the client and discussing any payment/fee arrangements. If a client has terminated services, the clinic Practicum and Contracts Coordinator will send the billing statement to the client by U.S. mail.
Free Therapy
The clinic does not provide free therapy to clients unless arranged as part of a contract with local organizations (i.e. relational sessions for U of O students). Such arrangements tend to undervalue the therapeutic process. This can have an adverse effect on the commitment and motivation of some clients toward the therapeutic process, thus prolonging therapy unnecessarily. As such, payment of an appropriate fee for professional services is an important consideration. In clients of financial necessity, fee adjustments may be offered. These adjustments carry specific conditions, which must be maintained by the client. Before offering a reduced rate to a client, interns should have a detailed discussion with their supervisor. The supervisor must approve the reduced rate. The desk staff must be informed of the reduced rate so the client will be charged the correct fee. See eligibility for payment reduction outlined below.

Eligibility for Payment Reduction
Payment reduction is available, on a very exceptional basis, when essential. Approval for fee reduction requires a conversation with the intern’s individual supervisor. No form is used for this arrangement – though a record that details the change is needed for Titanium, so interns need to consult with the desk staff once these arrangements are made. Fee reductions are temporary and shall not exceed three sessions. Beyond three sessions, an additional conversation with the individual supervisor is required. The desk staff must be informed of any changes in fees, so the correct fee is charged to the client. Fee changes must be noted in Titanium, along with the dates, fee, and review date. The desk staff can assist interns with updating Titanium.

Health Insurance Reimbursement
Insurance policies vary widely regarding reimbursement for mental health services. Any question of coverage is a matter between the policyholder and insurance company. Clients may wish to contact their insurance company to inquire about the extent of policy coverage for services provided at the clinic. Upon execution of a signed release of information, the clinic can provide a standard receipt, which is generally acceptable for submission for insurance reimbursement.

Client Failure to Maintain a Scheduled Appointment
If the client fails to show for a session, it is the therapist’s responsibility to clarify with the client whether they are planning to return for treatment. If the client states that they do not wish to continue in therapy at this time, the file is closed and proper termination paperwork documented in the file. If a client routinely misses appointments, directly address this issue in session and with your supervisor. In these situations, it is customary to send a letter to your client. A standard letter is available on the clinic computer in the observation room. If the client does not respond to your letter, promptly close the file.

Transfer of Clients
The CFT clinic follows campus policies for diversity and equal opportunity in its method of assigning clients. On occasion, clients may request a transfer to a new therapist. Sometimes these requests are due to valid concerns (e.g., client has requested a therapist of a specific gender due to a history of trauma) and other times it may be a personal preference. If a client requests a transfer to a new therapist, interns should adhere to the following protocol:

1. Therapist will contact their individual supervisor to discuss the request.
2. Depending on the circumstances, the therapist will be advised to offer the client one or more options for continuing with services:
   a. Continuing with the current therapist
   b. Continuing with the current therapist and adding a co-therapist
   c. In rare instances the client may be transferred to a new therapist within the CFT
   d. Referring the client to an outside agency (therapist needs to provide 3 referrals at this time)
3. The therapist will provide the desk staff with a completed Data Entry request form, if the client is being transferred to a new therapist so it can be reassigned in the database and Titanium.
4. If the client contacts the clinic with a request for a new therapist (versus talking with the therapist directly), the following steps will be taken:
   a. The clinic manager will simultaneously notify the therapist and their current supervisor.
   b. The current supervisor and therapist will discuss the request, and the therapist will be advised to follow the above protocol.

Completion of Services
At the Center for Family Therapy we believe in seeing people in therapy only as long as it is apparent that they are experiencing clear benefits from the service.

Typical elements in effective therapy:
1. A supportive relationship actively working toward desired changes.
2. Direct conversations about desired changes, including therapist recommendations for change and your thoughts and feelings about those recommendations.
3. Seeking additional support services when the therapist views them as necessary for successful treatment and ongoing conversation about your thoughts and feelings about those additional services.
4. Paying for services when they are rendered.
5. Attending regularly scheduled appointments, and if cancelling is necessary, providing 24-hour notice. It is important for your relationship with your therapist to clearly communicate any expected absences prior to the scheduled appointment. Failure to show up for scheduled appointments can be detrimental to effective therapy. Regularly attending sessions is typically an important aspect of making progress toward positive changes.

**Typical reasons for ending therapy:**
1. The goals of therapy have been accomplished and you and your therapist agree to end treatment.
2. You and/or your therapist believe that you are not benefiting from therapy after reasonable efforts have been made to address your needs. Should this occur, we will work with you to identify a more useful approach for your particular circumstances.

Immediately upon completion of services, all necessary forms must be completed and placed in the folder. The closed file should be reviewed by the supervisor, co-signed, and properly placed in the "Closed" files at the clinic.

**Client Follow-Up**
Each therapist is encouraged though not required to conduct a follow-up telephone call with terminated clients at one month, three months and six months after the date of termination. Each call should be noted on the Client Contact Sheet in the client file.

**Referral Sources**
When receiving a referral from a community source such as a minister, teacher, physician, etc. it is appropriate to acknowledge (by telephone or correspondence) that the referral has been seen as long as the client agrees to this contact. The client(s) will need to complete a release of information for the therapist to acknowledge the referral. Specific information concerning the client (including but not limited to name, presenting concern, or details of the client) should not be provided to the referral source without first obtaining specific written permission from the client.

**Correspondence With Clients**
Telephone contacts with clients should be noted on the Client Contact Sheet indicating the date and nature of the telephone contact. A copy of all correspondence sent to a client should be placed in the client file and recorded on the client contact sheet. Additionally, a copy of all correspondence received from a client, including notes, cards, etc. should be placed in the client’s file.

**With Other Sources**
All requests for client information (such as a copy of the client’s file) should be brought to the attention of the intern’s supervisor and the clinical director. Requests for information concerning clients can only be provided to outside sources after securing a written release from all adults who participated in the therapy sessions.

**Team Practice Guidelines**
1. Team therapists (observing sessions) must be involved in more than 80% of the total client contact hours and must take an active part in the therapy process to have the hours count as client contact.
2. Therapists should consult with team members each session. This includes for each session conducting a pre-session meeting, consultation during a break in the session, and post session follow-up.
3. There should be no more than three team members observing each client.
4. If a team member agrees to be on a team, they must commit to be on the team for the entirety of the client from the point of joining the team.
5. The therapist of record for the client directs and maintains ultimate decision making authority in the client (with supervisory oversight).

**Co-therapy Guidelines**
1. While co-therapy offers advantages to student practitioners with regard to breadth of clinical experience and exposure, therapists practicing co-therapy are expected to be familiar with the disadvantages of co-therapy and make every effort to minimize these disadvantages (see attached document). Therapist should make every effort to resolve differences and conflicts as they arise, and consult with their supervisor when necessary.
2. The therapist of record must take responsibility for the client, decide and direct the overall direction of therapy, and be responsible for all client documentation and follow-up.
3. Should a difference in opinion occur with regard to the therapy process, the therapist of record maintains final decision making authority (with supervisory oversight).
4. The therapist of record seeks supervision for the client system.

**Equipment**
Interns should familiarize themselves with the operation of video equipment at the clinic. Interns should inform the Clinic Manager of any equipment malfunction or issues of poor picture or sound. When reporting issues, identify the exact equipment (computer, printer, camera, etc.), issue, room, date and time that the occurrence took place.
Equipment Procedures

Session Video Recording
- Interns will receive an orientation and training on session observation and recording equipment and procedures.
- Recording will be started and stopped from in-room laptops (instructions to be provided).
- In-room laptops can also be used for playback of recorded video.
- Observation computers in the three observation rooms can be logged into the camera feed for any therapy room. See HEDCO Clinic observation room practices section for restrictions.
- Headphones have volume control on the console and on the cord. Volume should be turned down when observation is concluded to prevent wear on the headphones.
- Supervisors will have the capability to view therapy sessions and recorded video of their supervisees from offices within the HEDCO building.

Video Save/Delete
- Videos are automatically saved to the intern’s file on a secure server. It is recommended that interns make file subfolders named by client code for each client. Interns will rename each video session with the client code and the session number and move the video to the client’s folder. Interns may make a folder labeled FCP for videos they are considering using for their FCP project.
- Session videos that are not needed for your FCP project may be deleted after you have had supervision following the session. Care must be taken when deleting videos, as once they are deleted, they are gone forever. There is no recycle bin. Any videos left on the server following graduation will be deleted.

Parking
Clients may park in the patient/client parking lot #19 to the south of the HEDCO building. In order to park in this lot, clients must obtain a parking pass from the clinic. Clients will be responsible for paying for their parking, if applicable and for any tickets earned while parking. The clinic does not provide parking to clinic interns. As students, interns are eligible to purchase UO parking passes for the purpose of parking in designated campus lots. Interns should contact UO Parking and Transportation for more information on parking passes, rules, and enforcement. Interns are not allowed to park in client parking lots.

Desk Staff
The desk staff consists of student employees hired for reception and scheduling duties, and to assist the Clinic Manager in the daily operations of the clinic. CFT interns are asked not to assign tasks or make requests of the desk staff’s time that are beyond the scope of their duties. Desk staff should not be asked to call clients on an intern’s behalf for any reason (unless directed by a clinical supervisor or clinical director), facilitate scheduling with a client, or conduct any other personal requests. Questions or concerns about desk staff duties or performance should be directed to the Clinic Manager.
Desk staff stay on duty until the last client has left. If no evening appointments are scheduled, the staff may leave after the last client has gone home or after 5pm whichever is later.

Visitors / Clinic Tours
For confidentiality reasons, interns are to refrain from having guests/family/children in the clinic (including the waiting room). Typically, the clinic will open for family tours on or near graduation day. Family and friends of interns are not allowed in the clinic at any other time.

Vacations and Term Breaks
- Interns should make specific arrangements with their clients for appropriate continuity of care during periods that the intern will be unavailable. During periods of absence, the therapist under supervisory direction should provide the client with the name and telephone number of professional support in the event of an emergency situation, consistent with the nature of the client’s needs. Please note the schedule for clinic closures outlined in the “Access” section of this handbook when planning vacations.
- Interns on break will write a note with the dates of their absence and attach it to their rotation card. If their card is in the front of the box, but they will not be in the clinic for two or more days, their card will be skipped and the intake will be given to the next available intern.

Staff Meetings
CFT clinic staff meetings typically take place the first Thursday of each month. These meetings are mandatory and require Clinic Director approval for absences. Please add dates/times to your calendar as soon as dates are available.
Data Collection and Research

The CFT maintains a client database containing data obtained from client questionnaires and surveys that are administered throughout treatment.

OQ-45 Questionnaire

At intake, 3rd, 5th, 10th and every subsequent 10th session, clients will be asked to complete a questionnaire using a handheld tablet or PDA. There is also a paper format available if that is preferred for the client. The OQ-45 monitors the client's experiences and emotional state over the past week and can show change over time. The report will also indicate any extreme responses to questions (e.g., if client has had suicidal thoughts). Interns are required to participate in this data gathering process; however, clients may choose to opt out (consultation with supervisor should be made in such clients).

OQ-45 Procedures

- When scheduling a session for which a questionnaire will be administered, interns should select the appointment type listed as “OQ-45/PDA Needed”. This designation will make the appointment marker appear bright green, indicating to the desk staff that a questionnaire is needed.
- The desk staff will administer the OQ-45 questionnaire on scheduled sessions before the start of session. A report will be brought to the intern prior to the start of session. Intern will be informed of technical issues that may result in a report being unavailable.
- The questionnaire typically takes less than five minutes; however, early arrival of clients is encouraged to ensure that session time is minimally affected. If the intern does not receive the report before going into session, it is the intern’s responsibility to check in with the desk staff before going into session.
- An OQ report will be taken to the therapy room for one of two reasons (the desk staff will knock on door and wait for you to answer in order to hand it to you). First, if the items of suicide and/or work violence are scored as "frequently" or "almost always." Second, if the total score is 100 or above. It is important to note that this assessment often yields data not gained in conversation in the therapy room. For this reason, if the report is not gathered by the intern before the session, for the purposes of safety, a desk staff person will deliver to the intern during the session so the intern is informed and can perform additional assessments with the client(s).
- If a scheduled questionnaire is missed, intern may request that one be administered by changing the appointment type in the scheduling computer to indicate an OQ-45 is needed (appointment will appear in bright green on scheduler).
- Interns should document the administration of the OQ-45 in the client contact log and the client note.

Database

The CFT maintains a database of client information obtained from intake questionnaires and periodic research and client satisfaction surveys. The database generates data used in annual clinic reports and research, so its accuracy is essential.

Database Procedures

- To keep data current, a Data Entry Request form (available in the front office at the clinic) should be completed any time the following occurs:
  - Change in client-type (individual, couple, or family), including the creation of a new client file or division of client files into new components (e.g., couple will be seen as individuals)
  - Addition of a client to a client
  - Change in client contact information
  - Client is transferred to a new intern
  - A co-therapist is added to the client
- The Data Entry Request form should be placed in the Data Entry folder in the Admin drawer. Desk staff will pull the file, make changes to the database, then return the file and form to intern’s file drawer.
Life Cycle of a Client File

- Physical client files are retained for fifteen years following the date of closure. The database will generate the date of file destruction for each file after closure.
- At point of file destruction, desk staff changes client file status to “File Destroyed.”

Intake Scheduled

- Client completes Client Questionnaire and other data surveys.
- Desk staff provides client paperwork to intern before session.
- Session is completed.

- Intern returns paperwork to desk staff.
- Desk staff enters data, designates client as “Active”, and returns paperwork to intern.
- Intern creates hard file. Label will include file code, term/year services begin. (e.g., DOJA SP13)

No Intake Scheduled

- Intern signs off on Telephone Questionnaire as “Inactive” and places it in Inactive Intakes file in the Admin drawer.
- Desk staff records reason for inactive status in database, and designates it as “Destroyed”.
- Telephone Questionnaire is destroyed.

Therapy Sessions

- Intern completes Data Entry Request form and places in Data Entry file in the Admin drawer when any change to client occurs (transfer, change in client type, etc.)
- Desk staff retrieves file, completes data update and returns file to intern’s drawer.

Client Case Closed

- After supervisor has signed off on Transfer/Completion form, file is placed in Closed Files drawer.
- Desk staff closes client in database, designates client status as “CFT-Archive.”

After Seven Years

- Physical client files are stored at the CFT for two years after closing.
- Files that have been closed for over two years are archived at the UO Archive Storage facility, clinic or scanned to a secure server. Desk staff will designate in the database the client status and file location.

Client calls or drops in to clinic.
Client File Forms

Telephone Questionnaire
This form is used at the time of client’s initial call to the Center. Desk staff will provide information about Center’s services and complete form with information provided by client.

Informed Consent for Treatment/Therapeutic Contract
To be completed by the therapist in the first session. Is a contractual agreement between the client and therapist which specifies the nature and terms of treatment at the clinic. A copy of this form should be signed by the client(s) and kept on file, and a copy should be given to the client(s) to keep. Therapy does not formally begin until the treatment agreement is signed by the clients and therefore should be completed at the beginning of the first session. See the Minors in Therapy section for further guidance.

Beneficial Services Agreement
This policy statement outlines the conditions for ending therapy. All clients should sign a copy of this policy during the intake session, and a copy kept in their client file.

Client Questionnaire
Provides client demographic and personal information as well as a brief description of client concerns. This should be filled out by the client(s) in the lobby, prior to the client’s first (intake) session.

Clinical Notes
Serves as a clinical tool to assist the therapist in working with the client, and recording the progress of therapy. A clinical note should be completed for each therapy session no later than 24 hours from the time of the session.

Transfer/Completion of Services
This form is to be filled out by the therapist at the end of treatment at the CFT, or when the client is transferred. A copy is kept on file at the clinic. A supervisor’s signature is required.

Authorization to Release Information
Must be signed by all clients prior to release of information by the therapist or Center for Family Therapy staff.

Initial Assessment and Treatment Plan (and Treatment Plan Revisions)
The form is designed to provide a clear focus for the therapy and the client with regard to the problems the client has brought to therapy and the plan generated by the therapist and client to move things in a more useful direction. The process of completing the treatment plan should be the main focus of the first few sessions in therapy and should be complete by the third session. The client(s), therapist, and supervisor must sign the completed treatment plan.

Client Contact Sheets (I and II)
Provides a record of the date of each client contact, payment of fees, and OQ dates.

Self Care Contract
This form can be used as a clinical tool to outline plans for client(s) to enact self care strategies.

“No Suicide” or “No Harm” Contract
This form is to be used as a clinical tool in situations where the therapist suspects clients are suicidal, exhibit suicidal behaviors or thoughts, threaten harm to themselves, or others. Use of this form does not absolve the therapist from doing more thorough assessments for violence and self-harm when appropriate.

“Time-Out Contract/No-Violence Contract”
This form is to be used as a clinical tool in situations where the therapist(s) suspects or knows about domestic violence. This is an agreement between clients and the therapist(s) that violence will not be used to handle conflict. Instead clients will negotiate a time out procedure to follow during times of conflict and/or escalated emotional states.

File Audit Form
Details the specific components of an audit review

Data Entry Request
Form used to communicate changes in client-type (individual, couples), additional case, change in therapist/co-therapist, or contact information.
Guidelines for Session Notes in Couples and Family Therapy

Reasons for Session Notes:
- AAMFT Code of Ethics requires therapists to keep an accurate record of therapy sessions.
- Notes help maintain continuity between session.
- Serves as a legal record of the events of the session.
- Allow for general statistical record keeping for the purpose of audit and research. Video recordings at the CFT are not intentionally part of the clinical record and should be erased after they are used for supervision.

Overview:
- Session note must be completed within 24 hours after the session, no exceptions, as required by law.
- Notes should reflect the progress that occurred in the session toward treatment goals.
- Therapist should sign the note at the end, which also includes their credentials (e.g. Mariko Kim, B.S.).
- Do not go back and append your note after it is completed; no white out; initial clearly any crossed out sections.
- Write every note as if your clients or the court will read it in the future.

Qualities of a good session note:
- Concise
- Relevant
- Objective (non-judgmental presentation of the facts)
- Written in black ink or typed
- Legible
- Dated
- Document all people present in the session.
- Consistent with the language of the treatment plan, informed by the client’s language and goals.
- Be succinct, only focusing on the most important aspects of the session.
- Be objective. Others watching your session should be able to agree with what you saw.
- Be strength-based. Write, as you would like to be written about. (Clients have the right to read what you write about them.) This does not mean that you need to lie, play Pollyanna, or obscure. Just be respectful.
- Document your client’s suicidality, homicidality, and anything you did to keep your client and significant other(s) safe.
- Every piece of information does not need to be in your note, especially information that might embarrass your client if he or she were to read it or it were to end up in court.
- Include any assessment, diagnosis, or intervention delivered during the session (including what you normalized, what you validated, or what you explored).

Special Concerns

Crisis Intervention
Occasionally, clients are seen at the center that exhibit behaviors requiring timely and specialized responses on the part of the intern. Legal and ethical considerations require that such responses attempt to ensure the safety and welfare of all participants involved in the therapeutic process, as well as individuals not involved in therapy who may also be affected by the actions of a client. It is important to recognize that appropriate responses to critical situations often require creativity and flexibility. Close supervisory support is particularly important in these clients. Contact your supervisor or on-call supervisor if you need support when dealing with crisis intervention situations.

Clients Exhibiting High Risk Behaviors
Any client involving behaviors (including ideations), which indicate a reasonable possibility of risk of life, physical abuse or sexual abuse should be considered high risk. Interns should immediately consult with their supervisor in such situations. Examples of high-risk behaviors include the following:
- Suicidal thoughts or actions on the part of any participant in therapy.
- Violence or the concern of violence emerging.
- Suspected physical abuse, sexual abuse, or neglect of a child under the age of 18 years.
- Clients in which there appears to be an acute reaction to drugs or alcohol, which present a clear and immediate danger to life.
  Any exhibited behavior which is bizarre, unstable, disoriented, or volatile and which by its nature suggest a reasonable risk to the safety of the client or others.
- Evidence of diminished functionality (such as severe depressive behavior, etc.) which presents a clear and immediate risk to the health and welfare of the client or another person.
Emergency Communication During a Session

In the event that an intern is faced with a dangerous situation in session it may be necessary for the intern to seek assistance without the client knowing. If the intern is unable to leave the room safely, the following should occur:

1. Intern will call main clinic number to speak with desk staff (dial 6-0923 or press speed dial button for this extension). In the event the desk staff does not answer, the clinician should call the Clinic Manager (dial 6-0915 or press speed dial button for this extension) or call a supervisor (numbers posted on telephone in session room).
2. When the call is answered, the clinician should identify his/herself and the therapy room number, and state, “My session is running long, can you call Mr. Smith to cancel his appointment?”
3. The staff person should respond to this prompt with a series of “Yes” or “No” questions. Below are the questions in order. The clinician should respond to each question on the phone to help the staff determine the type of help that may be needed.
   - Are you in danger?
   - Do you need me to call the police?
   - Do you need me to call a supervisor?
   - Do you need someone to watch your session?
   - Do you need someone to come to stand outside the room?
   - Do you need someone to knock on the door?
4. If the clinician answers “yes” to any of the questions, the staff person will immediately take the requested action(s) upon hanging up the call (e.g., call police, call supervisor, knock on door, etc.) The staff person will seek advisement from the Clinic Manager or on-call supervisor if there is any ambiguity on the course of action.
5. If the police are called staff should:
   - Explain the situation as quickly as possible – Example, “I am calling from a University of Oregon clinic. A therapist, who is alone with a client, is in danger and asked that I call the police. I do not know anything more about the situation in the room.”
   - Be ready to provide the building name and street address (170 HEDCO Education Building, 1655 Alder St, suite 170) and the cross streets (Alder and 17th).
   - Direct officers to the correct therapy room upon arrival.
6. All incidences of this protocol being used should be reported to the Clinic Manager so that the procedure can be evaluated with the Clinic Director.

Clients Involving Suspected Child Abuse

All clients involving reasonable suspicion of child and elder abuse require that a mandatory reporter “… shall immediately report or cause a report to be made” (ORS 419B.010). The proper contact number is listed in small print on each phone at the CFT. Given the complexity of these situations, always contact your individual supervisor or the supervisor on call prior to making a CPS report.

Request for Release of Information

All requests for information by third parties shall be reviewed by a supervisor. Under no circumstances will a therapist allow information to be released to a third party without written permission from the client(s). The release should be specific and dated. A copy should be placed in the client’s file. Client requests for copies of records must be submitted in writing with a description of requested documents and a stated intent of use. A copy of this documentation should be placed in the client’s file.

The clinic does not generally release photocopies of client records but rather will issue treatment summaries or records of attendance if the appropriate written requests have been obtained. The following protocol should be followed for the release of client records. Please note that in clients where there are multiple clients (couples and families), all adult clients must sign requests and provide identification as indicated below or no information may be released. A handout summarizing this information is available to distribute to clients.

Requests from current clients or recently terminated clients (for treatment summary or record of attendance requests only):
   - The therapist of record should process the request in consultation with a supervisor.
   - The therapist must obtain a CFT Release of Information form signed by all adult clients on the client. Original signatures are required (no photocopies or fax copies). This request must include: name, signature, and date of birth. It must also outline the following: specific information being requested (e.g., dates of attendance, treatment summary, intake summary, etc.), and the reason for the request (e.g., proof of treatment for court hearing, custody hearing, disability hearing, etc.).
   - Information should be released directly to the client(s) in person. If information is being released by a staff member designated by the therapist of record, the client(s) must present state-issued photo identification (all adult members of the client must be present). Client information may not be released via fax or mail.
Requests from former clients (for treatment summary or record of attendance requests only):

- The CFT Clinic Manager should process the request in consultation with the Clinic Director.
- A written request (a letter or Release of Information form may be used), signed by all adult clients on the client, must be obtained. This request must include: Name, signature and Date of Birth. It must also outline the following: specific information being requested (e.g., dates of attendance, treatment summary, intake summary, etc.), and the reason for the request (e.g., proof of treatment for court hearing, custody hearing, disability hearing, etc.).
- Instructions for a Treatment Summary: Please follow the template on the clinic computers entitled 'Treatment Summary.' In short, we can provide objective information regarding the client(s) time in therapy. A treatment summary can include dates of therapy, who has attended therapy, outlined goals, and progress toward goals. All treatment summaries must be approved and co-signed by the intern’s clinical supervisor.
- Information should be released directly to the client(s) in person. Client(s) must present state-issued photo identification when picking up information (all adult members of a client must be present). A photocopy of the identification will be placed in the file. Client information may not be released via fax or mail.

Release of photocopied records:
The CFT Clinic Director and Clinical Supervisor must evaluate requests for photocopies of original records. In the rare event that client(s) must obtain photocopies of file documents (client notes, assessments, evaluations, etc.), the following protocol should be applied:

- The client(s) should be informed by their therapist, clinic director, or supervisor of the risks of releasing complete documents to themselves or a third party (e.g., documents could be lost, information may be misinterpreted or misused).
- Client(s) should be encouraged to find out specifically how records will be used if being presented to a third party.
- Client(s) will be responsible for paying a $20 fee for photocopying records.
- Client(s) will need to present state-issued photo identification (copy should be made and placed in the original file) and sign an Acknowledgement of Receipt of the requested file contents. This document will be placed in the client file. It is the client’s responsibility to deliver information to third parties. Client information may not be released via fax or mail.

Release of Information after the death of a client:
In the rare circumstance that a family member wishes to obtain records of a deceased client, the following protocol should be applied:

- To request confidential records of a family member after the death of the family member, the requester would need to produce legal documents that demonstrate that they have access to those records, in keeping with the law.
- One method to produce this documentation is to become the “executor of the estate” of the deceased. If this is the client, the family member would need to provide a conformed copy of the court order appointing him or her as the “executor of the estate” of the deceased along with valid identification. A conformed copy is one that bears the court’s stamp indicating that it has been filed with the court.
- Oregon allows an abbreviated procedure for handling small estates that would otherwise require a full probate. The procedure involves filing a document called an “affidavit of claiming successor.” This abbreviated procedure can be used if the estate’s personal property is valued at no more than $50,000 and real property is valued at no more than $150,000, for a total aggregate estate value of no more than $200,000. The person submitting the affidavit must provide a certified copy of the filed affidavit in order to obtain the records.

Request for Litigation Support
Couples and Family Therapists are increasingly being called upon by the legal system to testify in a professional capacity; either as expert witnesses or factual witnesses. Such requests may be initiated by the client, legal counsel or the court. Interns should consult with their supervisor immediately when they suspect they will be asked to participate in legal proceedings.

The CFT does not offer divorce mediation, child custody evaluations, or litigation support services. Expert witness and legal support services must be performed by a licensed therapist and as such are not consistent within the mission and scope of the CFT.

The CFT does not voluntarily allow the participation of interns in litigation support services. Therefore, interns should discourage their participation in such activities. In the event that client records or an intern is subpoenaed relating to a client, the supervisor of record and clinical director should be notified immediately.

Since interns do not enjoy independent status as mental health professionals, participation in the legal arena requires the active involvement of the intern’s supervisor. The supervisor of record will accompany the intern in the event they are
compelled to participate in legal activities (such as depositions of court appearances). It should be clearly communicated to clients that a fee of $100 per hour will be charged for such activities.

Occasionally, requests for legal support services will arise during the course of therapy relating to other treatment concerns. The therapist should consult closely with their supervisor in order to maintain an appropriate therapeutic role with the client.

Clients whose primary request for service is child custody evaluation or litigation support should be referred to a family therapist who offers such services.

**Court Mandated Therapy**

The CFT works closely with the courts in providing appropriate professional services for adjudicated mandated therapy as a matter between the client and the court. Services will be provided to mandated clients under the same guidelines as with any other client. Interns working with court mandated clients should discuss the referral with the judge or probation officer after reviewing the client referral with their supervisor. Every effort should be made to clarify and assist in meeting the goals of both the referral source and the client in clients involving mandated therapy.

**Professional Conduct**

**General Expectations**

While recognizing the differences in style and diversity among individuals, therapists are expected to maintain a professional demeanor in appearance and attitude when operating in a professional role. Students in the CFT program are expected to operate from a primary moral position based on the best interest of the client. This requires, an understanding of appropriate therapeutic roles, therapist's skills, and limitations pertaining to each client. Interns should be familiar with, and abide by, the codes of ethics of the American Association for Couples and Family Therapy, and the laws of the State of Oregon relating to professional conduct.

**Dress Code**

Interns should maintain professional appearance at all times when working in the clinic. Professional appearance shows respect for clients, the facility, and the programs being represented.

Dress should not include:

- logo t-shirts, workout clothing (e.g., sweat shirts, sweatpants, or track clothing)
- clothing that is excessively tight or short, exposes undergarments, mid-drifts, or excessive cleavage
- shorts or skirts that expose the students' legs above the knees
- garments or shoes that are stained, dirty, or in disrepair
- garments or shoes that restrict movement necessary to complete service or work functions, or are a distraction to the workplace
- garments that suggest extremely relaxed clothing and do not communicate professionalism
- scented body products

The HEDCO Clinic has a low/no fragrance policy. Strong scents or heavy concentrations of body scenting products which others may find personally offensive or cause discomforting symptoms are not appropriate in the clinic setting.

**Social Networking**

Interns are not allowed, for any reason, to mention clients, therapy, or seeing clients in any way on social networking sites such as Facebook and Twitter. This is a breach of confidentiality, even if you are “vague” in your statements or provide positive sentiments. Please consider your professionalism on social networking sites and change your settings to private to avoid client systems finding you on these kinds of sites.

**Therapist-Client Relationships**

The relationship between the therapist and client is unique among human relationships. This relationship entails a basic belief that the therapist’s first obligation is to do no harm to the client through any act of commission or omission. To this end, the purpose and nature of the therapeutic relationship, goals and objectives should be clearly discussed and agreed upon during the initial stages of therapy.

Because of the potential for undue influence or exploitation, dual role relationships should be avoided between the therapist and client. When such dual role relationships become unavoidable (such as church or work contacts), the intern should work closely with their supervisor to minimize the potential for adverse effects.

**Faculty-Student and Peer Relationships**

Students and faculty are encouraged to develop collegial relationships in order to foster a creative learning environment. Cooperation and collaboration are advocated on professional, educational, and research activities. It is expected that students will work to resolve their differences with each other and faculty/supervisors when they may arise. This involves first addressing differences directly with the intern's colleague when issues arise. If repeated and determined efforts to resolve the concern by addressing them directly have failed, the intern may decide to approach
their individual supervisor to help reach some satisfactory conclusion to the conflict. The supervisor may request a meeting with all involved parties. If repeated and determined efforts to resolve the concern at this level fail to produce a satisfactory outcome, the intern may decide to approach the clinical director. The director may ask for a meeting with all involved parties.

Interns should be aware that the ability to maintain a professional relationship with colleagues and supervisors is an important quality for the intern to possess. If the intern is unable to maintain professional working relationships, the director may ask to meet with the intern and initiate a remediation plan to overcome any issues related to collegiality and professionalism. The clinical director maintains the option to remove an intern from the internship due to issues of professionalism and collegiality.