

# **Ethics and Technology in 2025: What's Fresh and What's Familiar Webinar Transcript**

JOHN WALSH: Welcome to Ethics and Technology in 2025, What's Fresh and What's Familiar? My name is John Walsh. I'm the project director of the Center for Innovative Training in Vocational Rehabilitation at the George Washington University. We are pleased to offer this training today in collaboration with the National Technical Assistance Center on Transition, the Collaborative.

We know the use of technology is ever expanding in all aspects of our lives, including the use of technology in counseling. This rapid advancement of technology at times, can be challenging and could challenge the timeless principles of trust, confidentiality, and human connection. As counselors, we are entrusted not only with our clients' stories, but also their privacy and their well-being. Yet, in an age where digital interactions are becoming the norm, we need to be informed how we can uphold our ethical responsibilities to those we serve. So I invite you in this training to listen deeply and engage with the content in order to apply some key ethical considerations in the use of technology in counseling.

I want to acknowledge that the contents of this training was developed by the support of the Center for Innovative Training in Vocational Rehabilitation and the National Technical Assistance Center on Transition, the Collaborative, both funded through grants from the US Department of Education. Opinions herein do not necessarily reflect the position or policy of the US Department of Education, and no official endorsement should be inferred.

OK, I want to turn it over now to our presenters, Doctor Rob Froehlich and Doctor Nichole Tichy, both of the George Washington University. So, Doctor Froelich, I'm going to start with you, and we'll get started on our presentation.

ROB FROEHLICH: That sounds great, John. Thanks so much. Hey, everybody, thanks for taking time to listen to us talk on this topic today. I think it's important for us to start out letting you know why Doctor Tichy and I are prepared to speak to the topics today. So I am an associate professor of counseling at the George Washington University. And in part of my role, I'm also with the GW Center for Rehabilitation Counseling, Research and Education and the NTACT:C Technical Assistance Center.

I've been teaching graduate level ethics courses for more than 20 years. I'm the former chair of the CRCC Ethics Committee, and I was a member of the 2023 CRCC Code Revision task force. And in addition to that, I provide counseling and psychotherapy services in a private counseling practice. But I want to share another disclaimer with you. I want to note that the comments and observations I make today are on behalf of myself as a professional. I'm not speaking in an official CRCC capacity. Doctor Tichy, you want to tell us a little bit about yourself?

NICHOLE TICHY: Sure. Thanks, Doctor Froehlich. Hi, everybody. My name is Doctor Nichole Tichy. I am also a member of the George Washington University, the Center for Rehabilitation Counseling Research and Education. I am an adjunct instructor at the University with extensive experience in terms of teaching ethics to both online and on-campus counseling students, both in the mental health counseling program and the rehabilitation counseling program.

In terms of my experience as an expertise regarding ethics, in addition to those courses, I have also presented on the topic of ethics and ethical decision making in a variety of capacities. I have also co-published an article relative to the CRCC Code updates, with Doctor Froehlich as being the lead author on those, and I am currently a member of the CRCC Ethics Committee. And so I also want to reiterate what Doctor Froehlich has stated in terms of the information that's being shared today is not in an official capacity with CRCC, but both of our perspectives and opinions.

ROB FROEHLICH: Next slide. Great, and so a little context too just to-- we both mentioned the George Washington University Center for rehabilitation Counseling, Research and Education-- just a little bit of context too. That center contains-- or not contains, but we work on a variety of different grant-funded projects, including the one that John directs, the Center for Innovative Training in Vocational Rehabilitation. We've provided the link to the website for you to take a look if you have some interest in finding more about GW CRCRE. Some other projects include the Virginia DARS EPIC project, the Vocational Rehabilitation Technical Assistance Center on Quality Management, or VRTAC-QM, the National Technical Assistance Center on Transition the Collaborative that I mentioned just a few moments ago, the VR Return on Investment Project.

And I also want to direct you to that last link, the Graduate School of Education and Human Development at GW. If you or anyone else in your network is interested in continuing your education, either at the master's level, online, or on campus in rehabilitation counseling, or if a PhD might be in your future, feel free to click that link and take a look, and we'd be happy to talk with you at any point. Next slide.

NICHOLE TICHY: So we are both super excited to embark and be able to provide information regarding what's fresh and what's familiar regarding the technology updates from the code of ethics. And so for today's learning objectives, we have a few things outlined that we hope you take away. First, we want to focus on understanding ethical implications of technology and its use in counseling. So we want you to be able to identify and explain some key ethical considerations related to the use of technology in counseling, specifically focusing on some of the updates to the code. But in addition to those updates, thinking about confidentiality, data security, and the impact of artificial intelligence.

We also want to be able to talk about applying the code of ethics to different technological scenarios. So how can you apply the information that's in the code and use that as a framework for a decision-making model to be able to ensure that your counseling practices remain ethical and in compliance with different professional standards? And then finally, developing strategies for maintaining professional boundaries in digital environments. We know that technology is ever expanding, and so we want to make sure that as professionals, that you have the tools and equipment in order to establish and maintain appropriate boundaries when using different types of communication tools such as email, texting, and social media in your counseling practices.

Next slide.

ROB FROEHLICH: So the basis of what we're talking about today are the counseling codes of ethics. Most specifically, what we'll be highlighting is the Commission for Rehabilitation Counselor Certification code of ethics, which was revised in 2023, as it most directly applies to the work that we do in the rehabilitation counseling and vocational rehabilitation arenas and related topics. The related American Counseling Association code of ethics, which was last revised in 2014 will also be referenced as well. Let's go to the next slide.

JOHN WALSH: So Doctor Froehlich and Doctor Tichy, although technology is ever evolving, we know there are really some solid ethical principles we can rely on to guide us in our work. So let's talk about some-- what are some of those familiar concepts we need to remember in the work we do?

NICHOLE TICHY: Thanks, John. That's a really great way to kick this off. So let's start our decisions and our discussion with the familiar topic, discussing the relationship between legality and ethics in the context of rehabilitation counseling and the use of technology. On this slide, we have a diagram that breaks decisions into four categories-- legal and ethical, legal but unethical, illegal but ethical, and illegal and unethical.

The top left quadrant represents actions that are illegal but ethical. For instance, a rehabilitation counselor might use an unapproved telehealth platform during an emergency to connect with a client who has mobility limitations. While this technically violate regulations requiring secure, HIPAA compliant platforms, it could be the only ethical choice to ensure that the client receives the immediate support that's necessary.

Next, we have the top right quadrant, which is where we strive to be, actions that are legal and ethical. For example, using a secure, HIPAA compliant telehealth system to support counseling and clients with disabilities ensures both legal compliance and ethical responsibility to protect client confidentiality. The bottom right quadrant highlights actions that are legal but unethical. Imagine a counselor recommending an expensive assistive technology device solely because they receive a commission from the manufacturer, even though a more affordable option would meet the client's needs. While not illegal, this prioritizes personal gain over the client's best interests, violating ethical standards.

And finally, the bottom left quadrant represents actions that are illegal and unethical. For instance, a counselor falsifying documentation to qualify a client for unnecessary services would not only violate the law, but also breach the core ethical principles of honesty and integrity. Reviewing this framework reminds us that as rehabilitation counselors, especially in the age of technology, our decisions must consider both legality and ethics, and by doing so, we ensure that we're serving our clients with professionalism and integrity while navigating the complex interplay of laws and moral principles.

Next slide, please.

As another familiar concept, let's also talk a little bit about something that impacts all of us, basic security and technology. Whether you're using a smartphone, a laptop, or a smart home device, securing your technology is essential to protect your personal and professional information and staying safe online. It's important to remember some basic technology and ethics privacy topics, such as using headphones during virtual appointments to help maintain confidentiality and protect against potential eavesdropping or using screen locks when you walk away from your computer or another device, such as a phone or a tablet, in order to prevent others from gaining access to private information.

Another important consideration is utilizing two-factor authentication whenever possible. This can add an extra layer of protection by requiring a second step, like a code sent to your phone, or your email, or a phone call before accessing your accounts. Finally, always using strong, unique passwords for your accounts. A good password is at least 12 characters long and combines uppercase letters, lowercase letters, numbers, and symbols. Better yet, using a password manager to help generate and store passwords securely can also be an added layer of protection.

When considering all of this and basic security steps, it's also important to ensure that you're following your agency protocols when it comes to updating software because it can be really important to make sure that those updates are occurring regularly. Updates often include patches for security vulnerabilities that hackers could exploit, so be sure to check with your agency policies or IT staff to determine the procedures for updating software.

Another important thing to consider is to beware of phishing scams. There is an increase in the number of phishing scams and in the creativity of those spam emails. So be super cautious with emails, texts, or links that seem suspicious or too good to be true. Phishing scams trick you into revealing personal information, so it's important to verify the sender and avoid clicking on unknown links.

And then finally, using secure Wi-Fi and avoid public networks without a VPN. Public networks can leave your data exposed. If you must use public Wi-Fi, avoid accessing sensitive accounts like your banking or your emails. Next slide, please.

ROB FROEHLICH: So along with some basic security measures are some kind of basic relationship considerations. And these have-- these are familiar and have not changed and still warrant discussion. Clearly, rehabilitation counselors or any types of counselors are prohibited from having sexual or romantic relationships with current clients. The 2023 revision added the concept of including sexual or romantic relationships that are of an electronic, virtual, online nature.

Whenever I'm covering this topic in class, all of the grad students typically are like, well, hee, hee, I can't believe you said that. Who would do that? Anyone who has ever served on an Ethics Committee or reviewed state licensure postings of revoked licenses would realize that, while it's not the norm, there still is a percentage of likelihood of this occurring. Sometimes we say, that goes without saying. Well, we have to say it so that it doesn't continue to be perpetuated. Next slide.

As well, don't forget about other appropriate boundaries. Section A.4.g of the CRCC code talks about extending professional boundaries. And these can be technological as well. So imagine the example we always use in person was, what if somebody invites you to their graduation. Well, what if that graduation event or what have you is virtual?

Remember thinking about what's the justification for why you would be attending. How will that, from a counseling perspective, help the person that you're working with? Is it related to the work that you do together? Is it related to some sort of a goal that will assist your client to achieve their own career or personal goals, and can you justify that? When is it-- when is it appropriate to extend those boundaries? When is it not?

And it's also important for us to consider the limitations of electronic communication with our clients. Don't forget about our ability to set boundaries too. Sometimes in this more virtual world that we live in, that implies that I, the counselor, will be able to get back to you immediately. You send me a quicker type of information, you send me a text or something. That kind of implies that I'm going to get back with you immediately. Part of professional disclosure is a good statement about saying, what are those parameters and being able to set those boundaries, A, so that your client is not disappointed, but B, so that you're also not feeling like you're on the clock 24/7 because nobody can do that. Next slide.

NICHOLE TICHY: So just as Doctor Froehlich mentioned, communication is at the heart of any successful counseling relationship. And so tailoring that communication to your client's preferred method is critical. So let's talk about how we can effectively and ethically communicate while considering accessibility, technology, and also individual preferences. First, ask yourself how does your client prefer to communicate and can you accommodate that preference. Some clients might prefer face-to-face meetings, while others may find virtual sessions or even text and email more convenient. Understanding and respecting these preferences builds trust and ensures effective engagement.

So let's take a quick peek at the code of ethics, specifically looking at A.3.c. When choosing a communication method, consider the client's developmental stage and cultural background. For instance, younger clients might feel more comfortable texting, while others may prefer an informal personal meeting. And so tailoring these communications to fit these factors ensures respect and inclusivity, but also, to the point that doctor Froehlich just made, making sure that you're establishing those appropriate boundaries and considering your needs in addition to those of the client.

We also want to think about accessibility. In this sense, accessibility is key. For clients with disabilities, such as an individual who might have a hearing impairment, virtual platforms with captions or other assistive technologies can make communication more inclusive. Even basic methods like email and texting require this consideration. Does the client have the tools and skills to use them effectively?

And so with that, we must also consider the interplay between code and policy. Communication methods should align with professional codes of ethics and institutional policies. For example, secure email systems or HIPAA-compliant platforms may be required when sharing sensitive information. And so always check how legal and ethical considerations interplay with those client preferences. Something like text messaging is not necessarily considered HIPAA-compliant, so it's really important to make sure that as you're navigating some of these preferred methods that we're considering all sides.

When considering your client's preferred method, another important piece of the code to talk about is section A.3.a.8, which is assessing benefits and risks. Every communication has benefits and risks. While texting might be quick and convenient, it's not always secure. Video calls can provide a personal touch, but also require stable internet access. And so it can be important to discuss these trade offs openly with your clients and make informed decisions together.

Another thing to think about is competence and accessibility. Both the counselor and the client must be competent with the chosen method. If you're using virtual platforms, ensure both you and the client are comfortable navigating the technology. If not, consider alternatives or provide support in order to bridge the gap.

Virtual versus in-person-- virtual communication offers flexibility and accessibility, but it's not a one-size-fits-all solution. Some situations, such as delivering difficult news or addressing sensitive topics, may be better suited for in-person sessions. But we'll talk a little bit more about virtual or telecounseling in a little bit.

And then finally, even some seemingly simple methods, again, like texting and email, come with considerations. We cannot stress this enough. So does the client have consistent access to a phone or computer? Is their information secure? Ensuring that these basics are covered helps build a solid foundation for communication.

Ultimately, by tailoring your communication methods to your client's needs, preferences, and circumstances, this is essential for establishing and developing that strong therapeutic alliance and ensuring you are communicating utilizing your client's preferred method. You can then create a more effective and inclusive counseling experience.

ROB FROEHLICH: Doctor Tichy, do you mind if I jump in for just a second?

NICHOLE TICHY: Not at all.

ROB FROEHLICH: Also, one consideration that comes to mind for me too is, it may be really important when you're thinking about your younger clients to cover these topics even more in depth because they've always lived in a world where almost strictly electronic communication and interactions have been present. And sometimes, they may be less aware of concepts like privacy or confidentiality, or they may have different thoughts about what that looks like. So when you think about the developmental trajectory of your client, it may be something worthwhile to consider expanding as well. Thanks for letting me jump in there.

NICHOLE TICHY: Sure. Next slide.

ROB FROEHLICH: So we've referred to other codes and organizations, but most of this presentation will use CRCC Code, as I mentioned before. But a really important thing to think about as part of your ethical decision making is ensuring that your practice is acknowledging your own experiences of the code and your own biases. Make sure not to weaponize any code of ethics based on your interpretation of the code to justify not adhering to your organization's policies and procedures. Maybe consult with some other people prior to assuming that there's a breach of use of the code of ethics within your organization.

Still think creatively and be willing to question policies and procedures, but objectively consider, am I engaging in this process of confirmation bias, looking for ways to prove what I think the code is saying and how that may play into this dynamic. Excuse me. Next slide, please.

JOHN WALSH: So I think both of you have presented a nice foundation on some core ethical concepts that we need to consider. So let's dive a little deeper. And what are some of those basic ethics and technology questions that we need to consider in our journey to practicing counseling in ethical ways?

ROB FROEHLICH: Sure, John. So let's-- as you mentioned, let's jump into it. Again, one of the basic pieces of considering ethics and technology is this conceptualization that technology is really a set of tools. We're using technology to do something in our counseling practice. So when you're making choices regarding technology, a great starting question is, why am I using this tool? What do I want the technology to add to the counseling relationship? What outcome am I looking for, and why will this chosen technology be of assistance?

What do I know about the technology? In what ways may this technology that I want to use invite others into the counseling or therapeutic relationship that might not-- we might not want to invite into the counseling or therapeutic relationship? And anything that deals with data that I'm entering into any type of platform or tool, I always want to be thinking about where does the data that I enter-- where does it go? Where is it housed? Where might it be used in a way that I don't want it to be used, and more specifically, that my clients don't want to be used?

So just really be thinking about, I'm using this for a particular reason. Is this the best way for me to accomplish my desired objectives with my client? So, next slide, please.

So again, critical thinking-- the ability to question, the ability to entertain multiple considerations at the same time and compare them-- critical thinking is essential. And it should be based upon our professional training and using that professional training to evaluate technology application and the use with our clients. So what do I mean by that?

Folks who are in the rehabilitation arena or in rehabilitation counseling have been trained in extensively long graduate programs. What is the information that you gained in that graduate training telling you about your use of technology? Always kind of lean back to you're an expert in this particular area. Think about does the technology enhance what I know to be best practices, or is there some reason that I should be concerned?

We should be using technology based upon our training. We should not be beholden to the information technology provides without asking important questions like, does that seem right? Is what I'm getting back from this technology, does that seem to make sense based upon my professional judgment? Or questions like, what is the decision that I'm getting back from this piece of technology? What is that decision based upon? Does it make sense? This should all be part of our ethical decision making overall, but even maybe more so when it comes to use of technology. Next slide, please.

JOHN WALSH: So we know that the CRCC code of professional ethics was updated in 2023. Can you provide us with an overview of those updates of the CRCC code specifically regarding technology?

NICHOLE TICHY: Sure thing. But before we move on to talking about some of those updates specific to technology, we wanted to provide a little bit of literature on the topic. So on this slide, we have some literature for your consideration, specifically five different articles that discuss ethical issues related to technology, including an article that specifically addresses some of the main changes that were made as part of the code of ethics revision. So that's that first article, "Rehabilitation Counselors and Technology, Social Media and Distance Counseling, Contemporary Considerations." That focuses specifically on the changes that were made to the technology section of the code of ethics.

Some additional articles for consideration include recent articles that address some of the hot topics that we're now seeing in the field, such as the increased use of technology within State VR agencies as a result of the COVID-19 pandemic, so the switch to telecounseling and the increased use of things like electronic signatures or different telehealth related platforms, and increased considerations with regard to the use of artificial intelligence and concerns with cybersecurity. So again, these are just for your consideration. If you have additional interest in the topic, we highly encourage taking a peek at some of this literature. Next slide, please.

So now as we move into more of what is considered fresh with regards to technology, the CRCC technology section moved from section J to now Section K. So Section K now covers technology, social media, and virtual counseling. And so this section addresses the rapidly evolving landscape of technology, social media, and virtual counseling. And it emphasizes that CRCs must carefully consider the legal and ethical implications of integrating these tools into their practices.

With this, counselors are called to be specifically mindful of three critical areas-- confidentiality, accessibility, and online behavior. We will briefly touch on these three areas in a bit when we do a high-level overview of section K and its subsections. But overall, section K reminds us that technology, while offering incredible potential to enhance services, also brings up some unique challenges. And so as rehabilitation counselors, it's our responsibility to then navigate these tools ethically and thoughtfully, ensuring that client welfare remains at the center of our practice. Next slide, please.

ROB FROEHLICH: So starting out in section K is the consideration of competence. So when we're using technology in the counseling relationship, we're held to the same level of expected behavior and competence as defined in the code, regardless of the technology used or its application. So literally, whether you're using technology or not, all of the same other considerations in the code hold true. You are not in a position to be able to say, because I was using technology, my measure of my ethical practice is different. No matter what technology you're using, you're held to the same level of standard.

Also, when we talk about competence, remember competence doesn't necessarily mean you're an expert. It's about having the knowledge, skills, and abilities to perform tasks effectively and ethically. You're an expert in counseling. But applying technology in that setting where you are an expert, you need to have the knowledge, skills, and abilities to perform the tasks effectively and ethically. So for technology, this could be understanding the benefits and limitations, and compliance with ethical and legal standards. That's one way to think of defining competence. So John, next slide, please.

So kind of a high-level overview-- there are five sections within-- five subsections within section K. The first one, as we just mentioned, looks at competence and legal considerations. So it kind of gives you the information pertaining to only providing services that you're qualified to provide through education, training, or supervision, and making sure that you're adhering to state and federal regulations like HIPAA.

The second subsection is accessibility and looks at ensuring that technology is inclusive of all of the clients that you work with. Technology is not helpful to anyone if they can't access it, right? So the imperative here is making sure that the person that you're working with can access the technology that you're using, and that they understand how to use it.

The third subsection is confidentiality and disclosure, thinking about concepts like protecting client data and informing clients of potential risks. Like I was mentioning before, this concept of confidentiality and privacy kind of is evolving over time. But making sure that we're able to describe, what do we mean by confidentiality and privacy.

Subsection 4, K.4, looks at social media, and we're going to talk a bit further about that in just a bit. But it includes considerations to allow one to maintain professional boundaries while, at the same time, quickly and effectively sharing information using social media. And then the fifth subsection looks at virtual counseling and things like evaluating the appropriateness of virtual counseling for the clients that you work with and having plans for, what if something goes wrong? What if there's a crisis situation? So we're going to swing back and talk in depth further about some of those subsections.

So let's go to the next slide.

JOHN WALSH: Yeah, thank you for providing that high level overview of some of the updates to the CRCC Code of Ethics. And now, as you said, Doctor Froehlich, we want to take a little bit of a deeper dive. And what are some of the things our audience should consider in order to apply those principles in their practice? And can you also review some of the basics related to technology use, especially social media? Social media is one thing that's very hot today, and it's really important that folks understand what has to be considered when we use social media in our practice.

NICHOLE TICHY: Sure, John, I'll get us-- I'll get us started and then hand it off. But one of the things when we think about and consider regarding technology is the basics on confidentiality. And so confidentiality is imperative when it comes to ethical practices in counseling, especially when it comes to managing sensitive information. There are two pieces of specific information that we often deal with in this setting, personally identifiable information, PII, and protected health information, PHI.

So PII refers to any information that can be used to identify a person. This can include details like names, addresses, social security numbers, telephone numbers, email addresses, or any other unique identifier. And so as counseling professionals, it's our responsibility to ensure this data is securely stored and shared only with proper consent and under legally mandated circumstances.

The other important piece of information when it comes to maintaining confidentiality is PHI, which goes a little bit further. It includes any information found in a medical or designated record that can identify an individual and is created, used or disclosed in the course of health care services, like diagnosis or treatment. So examples can include medical histories, lab results, or treatment plans.

Protecting PHI isn't just ethical, but it's required under laws like HIPAA. And so as professionals, we must both safeguard PII and PHI as we're collecting information from our clients during their intakes or eligibility determinations because this sensitive information ensures that we're providing the highest level of care. And so by understanding and respecting the importance of both of these, PHI and PII, we ensure not only compliance with legal standards, but also the preservation of our client's dignity and privacy. Next slide.

ROB FROEHLICH: So let's talk a little bit about social media. Some considerations when social media is applied within the rehabilitation arena include considering what are the strengths and benefits of social media. Being able to connect people with information quickly, being able to harvest information really quickly are some obvious benefits of social media. Some limitations include confidentiality and misinformation.

I sit here in front of you telling you that the stance towards social media in the rehabilitation arena has really evolved over time. I've been doing trainings like this for long enough to be able to recall when we first introduced concepts on this, it was like, just say no. Don't friend anybody. Have absolutely no contact. The boundaries are clear. It's yes, no. We've really evolved over time. And I think that the most recent revisions to the code of ethics reflect that.

It's not a yes, no. It's a how do I engage appropriately with social media and with my clients. So the recommended use of social media is covered in the code, and it contains information pertaining to things like having a professional electronic presence, monitoring social media, and monitoring social media relative to things like making sure to remove anything on a professional site that's incorrect or potentially harmful.

Social media and informed consent, for instance-- what's your policy regarding friend and follow requests? Making sure that your organization has a social media policy, privacy and social media-- not searching clients unless there's something relevant to the rehabilitation counseling process. But also, an evolution within the consideration of social media and rehabilitation is the client confidentiality and privacy, but also the counselor privacy and confidentiality. That's kind of had an expanded view most recently too.

And then maintaining confidentiality and social media-- so obviously, making sure not to post anything that jeopardizes confidentiality or protected or sensitive information like Doctor Tichy was just talking about OK. Next slide, please.

So some considerations relative to social media and how your clients can access you-- think about how do you work basic technology like text into the counseling relationship. How do you communicate that with your clients? What part of your informed consent discussion includes topics like this? And perhaps if it doesn't, this is an area of growth that would be of assistance to you.

How do you articulate it to your clients? How do you communicate your approach to counseling and technology? And there are many appropriate such approaches. How do you communicate your approach to your clients so that you're all-- that you're treating all of your clients similarly and fairly-- that you're not just having one approach with communicating with some of your clients and then with some, you're treating them differently.

So perhaps for you, even developing a statement on your thoughts towards various forms of technology, including basic and social media and being able to articulate that so that you're clear on it and that your clients are clear on it as well is an important part of considering the introduction of technology into your work with your clients. Next slide, please.

So the digital footprint is an important consideration relative to the crumbs of bread, if you will, that are left virtually by all of us in the world that we live right now. So thinking about searching your client outside of a session-- are you looking because you're curious? Because that's not ethical. That's problematic. Are you looking because there's an employment related or counseling related intention? That can very much be ethical in nature.

But perhaps even taking that a little bit further-- if you are looking with an employment related intention about, what does the internet and what does the technological footprint look like for your client? If there's a concern that relates to perhaps a type of position that your client is looking for and what that digital footprint looks like and says to potential employers, can you and your consumer or client work together to search and find out and then process and talk about ways to adjust that or ways to consider what those implications might be?

And then also, do you have a standard that you use to make decisions on this topic so that you're not profiling the people that you work with? Do you do it for everyone? Or do you just really target it? Because if you're targeting it, that may unfairly impact your clients, right? And then as I mentioned before too, there's been some evolution on the consideration of privacy, not only for clients, but for counselors as well. So let's go on to the next slide, please.

NICHOLE TICHY: And so here, we start getting into the various subsections of the code as they relate to what Doctor Froehlich was just talking about. So specifically, section K.4.a of the code provides guidance on how to approach a professional electronic presence with integrity and purpose. And so with this, it's important to identify a clear purpose and limits to the professional presence.

So if CRCs choose to create a professional social media presence that is separate from their personal accounts, they must clearly display the purpose of their professional page. This includes outlining its focus, such as sharing resources, educational content, or engaging with clients, and defining the limits of its use, like not engaging in private counseling sessions through social media. And so something like professionalism is non-negotiable.

In all interactions on electronic platforms, counselors must demonstrate integrity and honesty. So this means ensuring that posts, comments, and shared content are appropriate and relevant to the profession of rehabilitation counseling. Another important consideration is that CRCs must avoid making statements or sharing content that is not relevant to the counseling profession. This includes refraining from political commentary, unverified information, or personal opinions that could blur the lines between professional and personal roles.

And so in this section specifically, it serves as a reminder that the digital realm is an extension of a counselor's professional identity. And by clearly defining the purpose of professional pages, adhering to ethical standards, and maintaining professionalism, CRCs can effectively use technology to support clients and provide a wide range of information by upholding values of the profession in an ethical manner. Next slide, please.

And so with that, the next section, Section K.4.b, talks about monitoring social media. And so now more than ever, social media is becoming a powerful tool for communication. But with its usage comes some pretty significant responsibilities. And so this section briefly highlights the importance of monitoring social media to maintain a professional presence while also upholding those ethical standards.

And so as professionals, it's important to recognize that content shared on social media is permanent. Doctor Froehlich just talked about that digital footprint. And with that, the information can easily spread beyond a platform's privacy settings. A post made today can resurface in unexpected context, potentially impacting professional credibility or client trust. And so, to mitigate risks, counselors must take reasonable steps to monitor their professional social media accounts. And so this involves regularly reviewing posts, comments, and interactions for potentially harmful or inappropriate content.

If harmful or inaccurate information is shared on a professional platform, counselors have an ethical obligation to remove or correct it promptly. So this ensures that their online presence reflects the values of integrity and professionalism, while preserving trust with clients and the community. It's important to remember that while social media can be a valuable resource for engagement and education, it also requires a level of vigilance. And so by actively monitoring professional platforms and addressing any issues that might arise, CRCs can maintain a responsible and ethical digital presence. Next slide, please.

And again, social media, the impact has changed over time. Its presence within the code of ethics has changed over time. And we're now seeing that it plays more significant role in counseling as a field. And so with its increased use, it's also important to make sure that it's guided by clear communication and ethical boundaries. So now we specifically talk about K.4.c, which emphasizes the importance of discussing social media as part of the informed consent process.

As always, when navigating informed consent and informed decision making, CRCs must explain to the client the benefits, limitations, and boundaries of using social media in their services. This ensures that clients have a full understanding of how social media will or will not be used in the professional relationship. As an aside, it can also be helpful to check with agency policies and regulations of the use of professional social media accounts.

As part of setting appropriate boundaries, something that Doctor Froehlich mentioned earlier, counselors must explicitly state in their disclosures that they will not accept friend, or follow requests from clients on their personal social media accounts. This protects the professional relationship and maintains ethical standards. Another consideration is after the rehabilitation counseling relationship has ended, professionals may decide for themselves whether to accept friend or follow requests from former clients. This decision should consider the potential impact on both the former client and the counselor's professional integrity.

Additionally, counselors should work within their organizations to create and communicate a clear, transparent social media policy. This policy should make the use of social media consistent and easy for clients to understand. When there are discrepancies between agency policies and the CRCC code, counselors are encouraged to advocate for alignment with the ethical code. If counselors choose to create a professional social media page, they can share this information with clients. This allows counselors to maintain professional boundaries while providing valuable resources or updates relevant to their services.

In terms of maintaining and respecting boundaries, it's really important, again, as part of this informed consent process, that making sure boundaries are outlined to protect both you and the client with regard to respecting those professional boundaries. And so, by addressing the usage or usage of social media in the informed consent process, you maintain a level of transparency and professionalism and ensure that social media is supportive rather than complicating the relationship and respects ethical boundaries. Next slide, please.

ROB FROEHLICH: So the last part considering social media is privacy and social media. And in this way, we respect the privacy of the client's presence on social media. And we avoid searching a client's virtual presence, unless there's something that's relevant to the rehabilitation counseling process. It's much like we just talked about in terms of the digital footprint.

If a counselor may search a client's virtual presence, this is disclosed in advance so that it's not a surprise to the client. And counselors caution clients of the potential impact that social media use may have on the counseling relationship and discuss the benefits and risks of using social media within the rehabilitation counseling process. So let's move on to the next slide, please.

A recent trend is this concept of note taking bots. And with our proliferation of virtual meetings-- goodness knows we've all probably been in five or six virtual meetings just today amongst everybody in the audience and the panelists as well-- we're urging people to consider the benefits and the risks of note taking bots. If there's anything that contains client information, we should avoid using such note taking bots because there's not a clear path as to where does that information go. Where is it housed? How long does it live? Who has access to it?

If it's a procedural meeting where we're kind of talking about the process that we use within a program or within an agency or within a school, that's different. But anything that contains client information should be protected, and the bots may have an impact on that confidentiality. Make sure that you use, again, your critical thinking to make that decision. If there's any possibility that anything HIPAA related, PII or PHI, will be discussed-- if that's going to be discussed, avoid using bots.

We wanted to share one project our-- oh, next slide, please. I wanted to share our NTACT:C uses this type of information in describing the policy toward note taking and bots. So in this particular program, we talk about meeting accessibility, that closed captioning and participant chat will be enabled for the meeting, that participants are going to be muted throughout the presentation, that viewer options are available using the platform that we use, that Spanish translation is available, and that a transcript will be available for download in terms of accessibility considerations.

But in terms of the dissemination of meeting highlights and resources, we also share that notes and resources will be shared via email post the meeting. And the link and passcode to the Zoom recording will be provided. We say all of those things because we also say, AI note taking bots will be removed from the meeting to maintain confidentiality and accuracy of the information shared. So this is just but one model for you to consider with the reasoning, the rationale behind why we use this particular approach. So I hope that's helpful to you. Next slide, please.

JOHN WALSH: So one of the key considerations for the work we do is accessibility of the technology we're using. I think we all agree that if folks cannot access a form of technology, we should not be using that technology. So let's explore a little further sections of the CRC code of ethics that will help in decision making regarding the ethical use of technology as it particularly relates to accessibility.

NICHOLE TICHY: And John, you are absolutely correct that there are two specific sections when we think about section K and technology that talk about accessibility. So in a little bit, we'll dive a little bit deeper into both Section K.2.a, acquisition and use of technology, and K.2.b, accessing technology. So next slide.

So CRCC Code Section K.2.a specifically emphasizes the ethical acquisition and use of technology in rehabilitation counseling. When providing technology-assisted services, CRCs must ensure that the technology, equipment, or platforms used, purchased or recommended are accessible and meet the needs of the clients. This includes considering individuals with disabilities, but also the usability and language preferences to ensure effective communication.

An additional consideration is to make sure that these technologies uphold security and confidentiality, and so counselors must use encrypted and password-protected communication methods to protect sensitive client information. The use of technology should be individualized and inclusive, ensuring that it enhances rather than hinders the client's ability to engage in services. Next slide, please.

In addition to the acquisition of technology, vocational rehabilitation counselors are also responsible for ensuring that clients can access the technology. So Section K.2.b of the code of ethics highlights the counselor's responsibility in guiding clients towards obtaining and utilizing technology-assisted services appropriately. Before recommending or implementing technology-based services, CRCs must carefully assess the client's emotional, physical, intellectual, and linguistic capabilities to determine whether they can effectively understand the application's purpose and functionality. This includes considering factors such as digital literacy, accessibility needs, and language barriers to ensure the technology aligns with their abilities.

It is also important to mention that counselors play a key role in helping clients obtain reasonable access to the necessary applications. This may involve providing alternative solutions, training, or additional support to ensure the client can fully engage with the technology-assisted services in a way that enhances their rehabilitation process. Next slide.

JOHN WALSH: So we all know that virtual meetings have become a normal way that many of us conduct our day-to-day work. So what are some of the considerations that our audience needs to consider when they're performing virtual counseling?

ROB FROEHLICH: Yeah, John, that's a great question. And it's more and more important in our world of work now as the proliferation of telehealth and telecounseling approaches are used. So the very first thing that I would direct people to is that the ethical practice of virtual counseling requires you to know, what do counselor licensure laws say about virtual counseling. What types of large-scale policy do I need to be aware of when it relates to the provision of technology in a virtual format?

Now you are, of course, going to consider-- we're going to talk more about this and your considerations relative to agency policy, because a lot of the people who are going to be viewing this webinar are going to adhere to what their policy for their organization says. But I wanted to go a little deeper at first and then come back out. We want to make sure that folks are aware that practicing or using virtual counseling across state lines has all sorts of considerations that are necessary to think about. Licensure portability, or the ability to be providing services in one state to someone else where you are not licensed has all sorts of challenges.

I do want to just let our listening audience know, the Counseling Compact is a new consideration that looks at the ability-- 37 states have already signed on-- to deal with some of this lack of reciprocity between state laws. So just be aware that the Counseling Compact is kind of a current event news type of thing that should be rolling out sometime in 2025.

But when we're thinking about provision of virtual counseling, some standards and technology include, as we've been mentioning, in order to use the technology, you have to be competent in it. Considerations relative to the confidentiality of the information that is shared within those sessions is important too. Also, what about if there's a crisis or an emergency, and the person is in one place, and you're in another? What are the policies and protocols that are in place to address that? Accessibility and equity-- again, if our clients can't access the technology or experience at the same way, then it's really not going to be very helpful to them. And considerations include legal disclosures about all of this information. But let's come from that deep water place and swim up a little bit to the next slide, please.

So two major factors to consider when it comes to virtual counseling are privacy-- privacy of information and privacy, even of the setting-- and then the appropriateness. So virtual counseling is super wonderful and awesome. And I believe in it, and I practice it myself frequently. It's not appropriate for everybody. So we have to be able to consider who is it most appropriate for, and who is it not. So let's go to the next slide, please.

First off, there's the data relating to virtual counseling. Is the platform that I'm using HIPAA-compliant? That's important. That's an important first thing. Who can access whatever personally identifiable or protected health information that I enter? Who has access to that? Is there a more conservative way to get the information that I'm looking for with less potential for outside access?

Where's the data that I enter housed? Where does it go? Is there a firewall? Is there a black box? So all of these things you're going to want to check with your agency guidelines and policies and procedures. Let's go to the next slide.

So decision making and whose needs are met-- is virtual counseling the preference of the client? Or is it a preferred agency approach? Or is in-person preferred? So you may be in an instance where it's the preference of your organization to provide services virtually, but that's not helpful for everyone, right? So some of this-- ethical practice involves the consideration of there may be exceptions to that rule. So are there evidence-based practices that talk about what it is that I'm doing with my client that I can apply to the work that I'm doing?

What can I do if there's a mismatch between the client's preferences and the agency's preference? To that, I would say we want to make sure that all of our services are individualized, and that includes virtual counseling. So is there a way that I can have a conversation if it is the preference of my agency to provide services this way? If it's not appropriate for someone, who do I talk with? How do I consult with my supervisor? And then how do we have a conversation, an informal resolution process of meeting the needs most specifically of my client?

How do I collaborate with someone when I have a dilemma about this? Who do I go to, and what do I know? All of ethical practice is on the foundation that I'm using an ethical decision-making model. And I use an ethical decision-making model because sometimes things go wrong. That's when I'm in a dilemma, and I don't know which of those paths to choose. So ethical practice requires me to use an ethical decision-making model. So again, coming back to making sure that the services that my client is getting are individualized, just like all vocational rehabilitation services should be. Can we go to the next slide, please?

So getting the counselor ready-- OK, what does the law say? What does the agency policy say? Knowing all of those things is important. Knowing who's a good candidate and who isn't-- being able to do a little bit of research as to who is virtual counseling most effective with? What can I, as the counselor, expect? I have to be a little bit prepared for the fact that there's a different level of energy between me and the person on the screen than would be if we were in person.

What if something goes wrong? How do I know how to get in contact with somebody in case something goes wrong? And it can be something as innocuous as the connection that I have stopped working, either on my side or the client side. How do I contact that client to make sure that everything is OK? And what are some emergency resources locally? If I'm providing services to someone who's in a different part of the state and there is an emergency, how do I connect with those emergency services locally? So those are counselor considerations. But let's go to the next slide.

Getting the client ready-- what can the client expect from virtual counseling? Some of those things, being able to even articulate what happens if the connection stops working, being able to prepare that person. Also, how should my client set up the environment in which they are experiencing this counseling? Remember, we're going to be talking about confidential information. Are you in a setting that allows you to talk about confidential information that doesn't have people coming and going that might disrupt that type of situation?

OK, so we want to consider the professional nature of the session. So when we're talking with our client, we want them to realize that just because we're delivering services in a virtual format doesn't change the fact that this is a professional interaction. Right? So that may have implications for appearance, for where you're taking the session from, all sorts of considerations like that. We want to also review the roles and relationships in counseling.

Sometimes it's helpful, even if you've already been working with someone, just to remind as the counselor, here are the expectations of what I do. As the person who's receiving counseling, here are the roles and responsibilities for you. And be also able to articulate the anticipated outcomes. What do you expect for the client as a result of this virtual interaction that you're having? So getting your client ready is an important piece. Let's try the next slide, please.

An important question comes up, even when we were developing this training about what about electronic signatures, and what's the guidance on that. So some solid guidance is first off, always check with your organization's legal counsel or your administrators for guidance specific to your state and your organization. An excellent resource is on this slide pertaining to electronic signatures. A link will take you to electronic signature laws and regulations for the United States in case you're interested and you want to take a look. Let's go to the next slide.

I certainly do not present myself as the expert on all things electronic signature related, but I did want to share some information with you too. So in 2000, the ESIGN Act granted electronic signatures the same legal status as handwritten signatures for interstate or international commerce. The requirements include the intent to sign, consent to electronic transactions, opt out options, the requirement to have signed copies shared, and record retention. This particular act excluded things like wills, codicils and family law matters.

The 1999 Uniform Electronic Transactions Act, which was adopted by 49 states and US territories, ensures legal recognition of electronic signatures and records. Again, some exemptions are wills birth and death certificates, and testamentary trusts. New York, for instance, has ESRA. It's a state specific law recognizing electronic signatures with similar legal standing as handwritten signatures, but with additional oversight and exclusions for specific documents.

So we want to drive you back. There may be some specific state considerations in the place that you're living that you want to check, or that you want to check with your administrators relative to electronic signatures. Additional insights include things like blockchain technology. States like Arizona, Nevada, and Tennessee have amended the Uniform Electronic Transaction Act to recognize blockchain secured electronic signatures and smart contracts. And blockchain technology is a type of distributed ledger technology that allows data to be securely stored and shared across a network of computers without the need for a central authority.

Document restriction-- some documents, like birth certificates, marriage certificates, death certificates and certain family law matters, often require physical or what's referred to as wet signatures. That is probably way more than you ever, ever wanted to hear about electronic signature considerations, but that should give you some basic information in case you want to learn more about any of those particular topics. Next slide, please.

Another important thing as it pertains to technology is making sure that we're having adequate supervision pertaining to our use of technology. A really important consideration is, if you don't know, ask. We can't all be experts on all things technological, but we can be expert on finding someone who is. So if you're not particularly familiar with a particular form of technology, maybe asking within your organization who might have more information that they can share with you is an important part of the use of technology. As we all know, rehabilitation counselors often are the folks who will find information. So for you, your task is finding who is the person who has the most information pertaining to the technology that I want to use. Next slide, please.

So we appreciate all of the time you've dedicated to viewing this webinar and considering ethical implications of the technology used in the provision of counseling. The fact that you took time to sit through a webinar pertaining to ethics and technology speaks highly of you already in terms of being interested in the content relative to your own ethical practice of counseling. So thank you so much for your time today. We hope that we've provided some information that gives you some guidance relative to the revised code of ethics for certified rehabilitation counselors.

And if you have any questions, our contact information is included. Doctor Tichy, to you.

NICHOLE TICHY: Again, I want to really reiterate what Doctor Froehlich has just said. Thank you for taking the time and the diligence to sit through this webinar on ethics and technology. One of the things that we must consider as rehabilitation counseling professionals is maintaining and continuing education. And so by engaging in this webinar on what's fresh and what's familiar, it helps to ensure that you are continuing and increasing your skills, your knowledge, in order to best support the clients that you're serving. So again, thank you.

JOHN WALSH: And I want to thank our two experts today that really linked the CRC Code of Ethics with a practical, ethical way to use technology in your counseling practice. I also want to inform our audience that there's going to be a part two. We're going to bring these experts back, and we're going to take a deep dive looking at the ethical use of artificial intelligence. So please, look out for that at TrainVR.org. We'll be sending out a notice via our newsletter when that's available. Thank you again for joining us today. Be well.