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# PRACTICE NOTES

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THE EVOLVING  
LANDSCAPE OF  
ELECTRONIC  
PRACTICE

# THE EVOLVING LANDSCAPE OF ELECTRONIC PRACTICE



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*Practice Notes is an educational tool designed to help Ontario social workers, social service workers, employers and members of the public gain a better understanding of recurring issues dealt with by the Professional Practice Department and the Complaints Committee that may affect everyday practice. The notes offer general guidance only and College members with specific practice inquiries should consult the College, since the relevant standards and appropriate course of action will vary depending on the situation.*

The global pandemic has required major adjustments in nearly all facets of life, and social work and social service work practice has also shifted accordingly. The College's Professional Practice and Complaints and Discipline Departments have been contacted on a frequent basis during COVID-19 about new ideas for electronic services. College members are reaching out to understand their professional and ethical obligations as they look for innovative ways to support and connect with clients. Although electronic practice is not new, the context of how services are offered has changed rapidly in the wake of the pandemic.

Throughout the pandemic, the College has posted information and resources on the [COVID-19 Updates webpage](#) to assist members who are navigating online practice. Members have been encouraged to review resources such as the "[Top 6 Considerations for Virtual Services](#)" and the following Practice Notes: "[Communication Technology Practices and Policies for a Digital World](#)," "[Communication Technology and Ethical Practice](#)" and "[Social Media and Practice](#)." These resources examine the ethical uses of technology in social work and social service work practice. They provide a helpful context for members as they consider the scenarios below.

These Practice Notes explore how the increasing prevalence of electronic practice has led to members contemplating new models of service delivery – a shift which requires engaging in further conversations about ethical and professional practice.

## SCENARIO 1 – CRISIS MANAGEMENT IN ONLINE GROUPS

*A member contacted the Professional Practice Department after starting an online mental health program with a colleague, designed to assist isolated individuals during COVID-19; the member reported*

*that during a group session, a client presented with active suicidal ideation. The member indicated that this event left them concerned about several factors, including effective crisis management, their potential duty to report, and the challenges associated with simultaneously supporting the client in crisis and the rest of the group in an online forum.*

Professional Practice staff suggested that the member reflect upon their initial conversations with group members, during which the parameters of service, group norms and the limits of confidentiality were discussed. The Standards of Practice state that, “College members provide clients with accurate and complete information regarding the extent, nature, and limitations of any services available to them”<sup>1</sup> and that clients should be informed “of foreseeable risks as well as rights, opportunities, and obligations associated with the provision of professional services.”<sup>2</sup>

While electronic services provide an opportunity for members to connect with clients during lockdowns, members must also consider and discuss the limitations with clients prior to service. For example, establishing clear boundaries and managing crises may be more challenging in an online environment. Developing agreed upon safety and/or crisis plans with group members and discussing how to proceed in the event of technical difficulties or power failure may mitigate the risks that could arise.

The Standards of Practice also require members to “inform clients early in their relationship of the limits of confidentiality of information.”<sup>3</sup> In this scenario, the member may need to consider their duty to warn/protect in relation to the client’s suicidal ideation, a concept that is more fully explored in the Practice Notes [“To Report or Not to Report: When That Is the](#)

[Question”](#) and [“Meeting Professional Obligations and Protecting Clients’ Privacy: Disclosure of Information Without Consent.”](#)

Lastly, Professional Practice staff encouraged the member to reflect on their competency with respect to the online group therapy platform that they were using; this platform had a function where participants could be moved into a breakout room, but neither the member nor the co-facilitator of the group was familiar with using this feature. During the consultation with Professional Practice staff, the member realized that this feature could have assisted them in providing more intensive support to the client in crisis, while the other facilitator could have continued to lead the group session. The member was reminded that the Standards of Practice state that “College members are committed to ongoing professional development and maintaining competence in their practice.”<sup>4</sup>

## SCENARIO 2 – GROUP CHATS

*A member contacted the Professional Practice Department to explain that they were planning to dedicate a social media page to mental health and wellness during COVID-19. The member wanted to indicate on the page description that they were a social worker, and that they would initiate chats and reply to comments and visitors to the page. The member wanted to discuss the ethical considerations if individuals contacted them directly with therapy requests as a result of this approach to service.*

As in the first scenario, Professional Practice staff suggested that the member consider that the Standards of Practice require them to provide clients “with accurate and complete information regarding the extent, nature, and limitations of any services

<sup>1</sup> The Ontario College of Social Workers and Social Service Workers (OCSWSSW), *The Code of Ethics and Standards of Practice Handbook, Second Edition, 2008*, Principle III: Responsibility to Clients, Interpretation 3.1.

<sup>2</sup> OCSWSSW, *The Code of Ethics and Standards of Practice Handbook, Second Edition, 2008*, Principle III: Responsibility to Clients, Interpretation 3.6.

<sup>3</sup> OCSWSSW, *The Code of Ethics and Standards of Practice Handbook, Second Edition, 2008*, Principle V: Confidentiality, Interpretation 5.4.

<sup>4</sup> OCSWSSW, *The Code of Ethics and Standards of Practice Handbook, Second Edition, 2008*, Principle II: Competence and Integrity, Interpretation 2.1.

available to them”<sup>5</sup> and to describe the “foreseeable risks as well as rights, opportunities, and obligations associated with the provision of professional services.”<sup>6</sup> The member was also encouraged to consider, among other issues:

- whether initiating and commenting on posts and chats were considered to be the provision of social work/social service work service;
- the ability to appropriately identify and assess (as required) any clients to whom social work/social service work services might be provided through the social media platform, and to address any related confidentiality or conflict of interest issues;
- the frequency with which they would respond to posts on their site;
- how closely they were going to monitor and moderate the page; and
- how they could clearly communicate all of the above to site visitors.

The Standards of Practice state that “College members may advertise their services through public statements, announcements, [and] advertising media,”<sup>7</sup> provided that these “are not false or misleading.”<sup>8</sup> The member was asked to consider whether potential clients or other visitors to the site might find the social media page misleading or unclear with respect to the boundaries of the services offered.

The member was also asked to consider how they would communicate on the website, and whether

site visitors might be unduly influenced to seek their counselling and therapy services. Urging or coercing site visitors to use the members services would pose ethical challenges and concerns. Professional Practice staff noted that the Standards of Practice require that “College members distinguish their needs and interests from those of their clients to ensure that, within professional relationships, clients’ needs and interests remain paramount.”<sup>9</sup>

Finally, the member was asked to reflect on the nature of the information and guidance offered on their site and to consider whether the “professional recommendations or opinions they provide are appropriately substantiated by evidence and supported by a credible body of professional social work knowledge or a credible body of professional social service work knowledge.”<sup>10</sup> The member was reminded that “College members are responsible for being aware of the extent and parameters of their competence and their professional scope of practice and limit their practice accordingly.”<sup>11</sup>

### SCENARIO 3 – CROSS-JURISDICTIONAL PRACTICE AND ONLINE MODULES

*A member contacted the Professional Practice Department for guidance as they had been asked to provide online education and training to social workers across Canada. Some of what they had been asked to provide would include self-directed, asynchronous, psychoeducation modules which the member would offer for sale on their website. The member was uncertain whether they were permitted to provide these services and wanted to determine next steps.*

<sup>5</sup> OCSWSSW, *The Code of Ethics and Standards of Practice Handbook, Second Edition, 2008*, Principle III: Responsibility to Clients, Interpretation 3.1.

<sup>6</sup> OCSWSSW, *The Code of Ethics and Standards of Practice Handbook, Second Edition, 2008*, Principle III: Responsibility to Clients, Interpretation 3.6.

<sup>7</sup> OCSWSSW, *The Code of Ethics and Standards of Practice Handbook, Second Edition, 2008*, Principle VII: Advertising, Interpretation 7.1.

<sup>8</sup> OCSWSSW, *The Code of Ethics and Standards of Practice Handbook, Second Edition, 2008*, Principle VII: Advertising, Interpretation 7.2.

<sup>9</sup> OCSWSSW, *The Code of Ethics and Standards of Practice Handbook, Second Edition, 2008*, Principle I: Relationship with Clients, Interpretation 1.6.

<sup>10</sup> OCSWSSW, *The Code of Ethics and Standards of Practice Handbook, Second Edition, 2008*, Principle II: Competence and Integrity, Interpretation 2.1.4

<sup>11</sup> OCSWSSW, *The Code of Ethics and Standards of Practice Handbook, Second Edition, 2008*, Principle II: Competence and Integrity, Interpretation 2.1.1.

The College has developed FAQs on cross-jurisdictional practice to assist members in understanding legislative requirements and other obligations related to providing services to clients in other provinces. The member was advised that if they want to provide social work education and training in other provinces, they should contact the regulatory bodies where the prospective clients are located to obtain accurate information as to the regulatory requirements in that area.<sup>12</sup> They were also advised to consult their professional liability insurance provider and to consider whether to obtain legal advice, as legislation and professional requirements may be different in each jurisdiction. For instance, members of the College, while they may be familiar with privacy and reporting requirements in Ontario, may not be familiar with similar legislation or obligations in other provinces.

Offering psychoeducational videos or modules on a member's website presents an expanded opportunity for service provision. By purchasing videos or modules, clients may be able to access helpful information which they can watch on their own time, whenever needed. As previously mentioned, members who are considering offering this service should clearly communicate to clients "complete information regarding the extent, nature, and limitations of any services available"<sup>13</sup> and describe the "foreseeable risks as well as rights, opportunities, and obligations associated with the provision of professional services."<sup>14</sup>

In this scenario, the member may wish to obtain a legal consultation to discuss potential risk and liability and carefully consider how to communicate to clients that:

- the information contained in the video or module is based on the Ontario context and on legislation in Ontario;

- the module is not intended to be a form of therapy; and
- by purchasing the video or module, the client is not initiating or engaging in a therapeutic relationship with the member.

## SCENARIO 4 – USE OF TESTIMONIALS AND ENDORSEMENTS

*A member contacted the Professional Practice Department with concerns about clients having left Google reviews on their website, and colleagues having provided endorsements on their LinkedIn account. The member was aware that the Standards of Practice do not permit the use of testimonials and was unsure how to manage this issue.*

Many members have shifted to providing their services using online platforms; it has become increasingly complex for them to decide how to manage issues associated with website reviews and social media endorsements. The Standards of Practice state that "College members may advertise their services through public statements, announcements, advertising media and promotional activities"<sup>15</sup> provided that these "do not include any endorsements or testimonials."<sup>16</sup> The article, "[Testimonials Did You Know](#)," further explains why testimonials are prohibited, in part because they may create a power imbalance or blur boundaries.

This issue of whether recommendations might be viewed as testimonials is more fully discussed in the aforementioned Practice Notes, "[Social Media and Practice](#)," which states, "[t]estimonials may create a kind of dual relationship in which clients come to believe that they have a different relationship with the member as a result of the endorsement that they

<sup>12</sup> This scenario applies specifically to social workers as social service workers are only regulated in Ontario.

<sup>13</sup> OCSWSSW, *The Code of Ethics and Standards of Practice Handbook, Second Edition, 2008*, Principle III: Responsibility to Clients, Interpretation 3.1.

<sup>14</sup> OCSWSSW, *The Code of Ethics and Standards of Practice Handbook, Second Edition, 2008*, Principle III: Responsibility to Clients, Interpretation 3.6.

<sup>15</sup> OCSWSSW, *The Code of Ethics and Standards of Practice Handbook, Second Edition, 2008*, Principle VII: Advertising, Interpretation 7.1.

<sup>16</sup> OCSWSSW, *The Code of Ethics and Standards of Practice Handbook, Second Edition, 2008*, Principle VII: Advertising, Interpretation 7.1.4.

have provided.”<sup>17</sup> Members should carefully consider the endorsements or recommendations function on sites like LinkedIn, which allow users to disable the recommendations section on their personal profile.

Even when members are aware that the Standards of Practice do not permit the use of testimonials or endorsements, unsolicited testimonials, reviews, endorsements, and “like,” “share” and “subscribe” requests on many professional websites, and the built-in review capabilities on many online sites and search engines can pose significant challenges. Members may not have control over who leaves a Google review on their website, for example. When considering this complicated issue, members may wish to consult with an IT professional and/or the person who designed their website to see if these functions can be removed or disabled.

It may be advisable for members to keep a detailed record of the IT professionals, web designers and other relevant professionals with whom they consulted in the event that they are required to demonstrate how they made efforts to address these issues. Members may also consider informing clients about the restrictions on testimonials and suggest that they therefore not post them on search engines or social media sites.

## SCENARIO 5 – INCORPORATING ADJUNCT PRACTICES

*The Professional Practice Department received an inquiry from a member who indicated that they were a certified life coach who wanted to offer life coaching as part of their online social work practice. While the member felt that this service may benefit some clients when offered in conjunction with their traditional model of service provision, they wanted to ensure they were following the Standards of Practice.*

The Standards of Practice state that, “College members are responsible for being aware of the extent and parameters of their competence and their professional scope of practice and limit their practice accordingly.”<sup>18</sup> Members who are considering incorporating adjunct therapies, techniques, or skills into their practice should give this careful thought, ensuring “that any professional recommendations or opinions they provide are appropriately substantiated by evidence and supported by a credible body of professional social work knowledge or a credible body of professional social service work knowledge.”<sup>19</sup>

While there may be some aspects of life coaching that appear similar or even complementary to social work or social service work practice, members should be very cautious about incorporating any other “helping” or wellness-related techniques into their practice.

The Standards of Practice require that “College members establish and maintain clear and appropriate boundaries in professional relationships for the protection of clients.”<sup>20</sup> This means that members must themselves understand, and be very clear with their clients about, the boundaries and limits of each type of service that they are providing.

Members must also ensure that they are distinguishing “their needs and interests from those of their clients to ensure that, within professional relationships, clients’ needs and interests remain paramount.”<sup>21</sup> Members should be able to demonstrate that the services they recommended and/or provided were supported by evidence and in the best interests of the client.

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<sup>17</sup> Betteridge, Lise. “Practice Notes: Social Media and Practice: Protecting Privacy and Professionalism in a Virtual World”, *Perspective*, Fall, 2011. [https://www.ocswssw.org/wp-content/uploads/2014/11/PN-Social\\_Media\\_and\\_Practice.pdf](https://www.ocswssw.org/wp-content/uploads/2014/11/PN-Social_Media_and_Practice.pdf).

<sup>18</sup> OCSWSSW, *The Code of Ethics and Standards of Practice Handbook, Second Edition, 2008*, Principle II: Competence and Integrity, Interpretation 2.2.1.

<sup>19</sup> OCSWSSW, *The Code of Ethics and Standards of Practice Handbook, Second Edition, 2008*, Principle II: Competence and Integrity, Interpretation 2.1.4.

<sup>20</sup> OCSWSSW, *The Code of Ethics and Standards of Practice Handbook, Second Edition, 2008*, Principle II: Competence and Integrity, Interpretation 2.2.

<sup>21</sup> OCSWSSW, *The Code of Ethics and Standards of Practice Handbook, Second Edition, 2008*, Principle I: Relationship with Clients, Interpretation 1.6.

There are many factors that members should consider when they are deciding whether to offer adjunct services within their practice; this topic is more fully explored in the Practice Notes, "[Incorporating Adjunct Techniques – What Are The Considerations?](#)" In addition to the strategies discussed, members may wish to consider the following:

- ensuring that their advertising, billing, consent forms and service agreements are clear about the nature of the services they are providing;
- not offering different services within a single session;
- having a separate website for each service;
- not referring clients from one practice to the other;
- not using their professional title or designation in connection with the adjunct or additional service;
- setting up appropriate supervision, regardless of the services provided; and
- discussing these issues with their professional liability insurance provider and obtaining a legal consultation.

In the scenario above, the member decided to create two separate websites – one for their social work practice and the other for their life coaching services. The member also decided not to refer to themselves as a social worker on their life coaching website, and to avoid informing clients about, or referring clients to, their other practice. Lastly, the member decided that they would respond to any clients who expressed an interest in their other area of practice by referring them to a colleague or other professional.

## CONCLUSION

The shift to electronic social work and social service work practice normalized by the pandemic has proven in many instances to be client-centered, increasing timely access to services. Many barriers faced by clients and prospective clients have been removed or eliminated, and there are more opportunities for members to offer the counselling and psychotherapy, support, training, supervision, and other professional services which are preferred by many service users and providers.

Despite the many positives associated with this transformation, members must continue to use their professional judgment when facing the ethical dilemmas and challenging practice scenarios described in these Practice Notes. They must also give careful consideration to how they will ensure their competence, establish and maintain boundaries and practise ethically and professionally in the online environment.