#### Procedure: Maintaining boundaries with clients and other external parties

**Purpose:** To clarify boundaries related to working with clients and community members. Boundaries refer to the lines that you must ***not*** cross when working with community members and/or clients as a representative of PHNTX. *All such individuals will be referred to as 'clients' for purposes of this Procedure.*

Solicitation of clients in any manner for services, goods or other business not related to PHNTX’ programs is grounds for immediate dismissal from employment. Any behavior that is exploitative, coercive or manipulative towards a client will not be tolerated and is cause for immediate disciplinary action or dismissal.

The following provides specific recommendations regarding maintaining clear boundaries when working with clients. In some instances you may need to use your judgment in making a decision; however it is imperative that you keep your supervisor apprised of the situation and obtain approval when necessary. ***Always discuss any questions that you have with your supervisor or the Chief Program Officer.***

Services

* Do ***not*** pick up food, bus passes, or any tangible item for clients unless the client is physically disabled, incapacitated, hospitalized or has no access to transportation. If this is required to fulfill programmatic needs, you will be given permission and specific guidance by your supervisor.
* In the event that you pick up tangible items, you must have the client sign a Tangible Items.

Receipt Form (see attached).

* Never give a client food that is a ‘left-over’ or unpackaged.
* Never provide clients with cigarettes, alcohol, and/or any illegal substances.
* Do not allow clients to send items other than letters through the mail to the agency.
* Do not offer to hold items for client at the agency. If this is required to fulfill programmatic needs, you will be given permission and specific guidance by your supervisor.
* Discuss extenuating circumstances in advance with your supervisor.
* All items that are given to clients must be approved and should fall within Community and Client Services guidelines.

Transportation of clients

* Never transport a client ***under any*** circumstances

Relationships

* Do not date or engage in any sexual activities with clients.
* Do not provide services to a person you know personally. This might include, but is not limited to, current partners, ex-partners, relatives, friends, neighbors or co-workers. Whereas, there are situations in which a personal relationship may exist with a current client of the agency, it is imperative that you discuss this with your supervisor. It may be necessary to transfer the client's care to another staff person or supervisor.
* Always be discreet in social situations outside of the agency with any client currently receiving services from the agency. ***Never*** discuss any client issues or personal information with clients in a social gathering.
* Do not discuss client information in areas that are accessible to those who should not have access to the information such as in the lobby, elevators, parking lot, or any public area.
* Never accept services from a client.
* Use discretion with regard to eating/sharing meals with clients unless it is part of an approved activity. If it is imperative to do so, make sure that you attend to the professional task at hand.
* Never share cigarettes, alcohol or illicit substances with a client.
* Use extreme discretion when sharing personal information about yourself with the client.

Communication

* Do not give clients your ***personal*** cell phone or home number for any reason. If you are in a dangerous situation or lost while on a home visit, you may contact the client from your cell phone by using \*67 to block your number or you may set up a Google Voice phone number. If using Google Voice, you must follow program guidelines in regards to availability to answer Google Voice messages.
* Do not communicate with clients through social networking websites (i.e. Instagram, Facebook, Twitter, etc.). If this is required to fulfill programmatic needs, you will be given explicit permission and specific guidance by your supervisor after consulting with, and obtaining permission from the Chief Program Officer.

Gifts/Contractual Work

* Do not accept ***any*** gifts or gratuities from clients. A food item that is within reason (not extravagant), such as a small baked good, may be acceptable.
* Do not give gifts to clients unless they are endorsed by PHNTX; this includes tangible gifts including gift cards. If this is an approved programmatic activity, you must follow specific procedures defined by the program.
* Do not engage in contractual agreements (verbal or written) with clients that may include selling to clients, buying from clients, and/or accepting or giving a monetary loan. A contractual agreement may include but is not limited to the following:

- Hiring a client or being hired to perform a service

- Renting a room

- Selling or purchasing goods such as vehicles or other items

- Money exchange of any sort

There will always be circumstances outside these guidelines, please seek guidance from your supervisor regarding specific guidelines. Failure to follow this procedure may lead to disciplinary action up to termination.

*This publication is part of a series of manuals that describe models of care that are included in the HRSA SPNS Initiative* Building a Medical Home for HIV Homeless Populations*. Learn more at* <http://cahpp.org/project/medheart/models-of-care>