

Confidentiality & Boundary Supervision Review Form

Purpose

This form is designed to facilitate supervision discussions related to **confidentiality and professional boundaries** in peer support work. Supervisors and peer workers can use this document to assess adherence to ethical guidelines, identify challenges, and establish corrective action steps if needed.

Section 1: Confidentiality Review

- Did the peer worker adhere to confidentiality guidelines in all peer interactions?
- Has the peer worker encountered any situations where confidentiality was challenged?
- Were any confidentiality breaches reported?
- Was informed consent properly explained to peers?
- Did the peer worker understand and follow mandated reporting laws?

Reflection Questions:

- Were there any moments of uncertainty regarding confidentiality?
- How did the peer worker handle situations requiring discretion or mandated reporting?
- What additional training or support is needed to reinforce confidentiality practices?

Section 2: Boundary Review

- Has the peer worker maintained appropriate professional boundaries with peers?
- Have there been any instances of dual relationships, over-involvement, or boundary crossings?
- Was self-disclosure used appropriately in peer interactions?
- Has the peer worker felt pressure to provide support beyond their scope?
- Were digital boundaries, including social media interactions, upheld?

Reflection Questions:

ADVOCATE. ACT. ADVANCE.

- Were there any situations where boundaries were unclear or difficult to maintain?
- How can the peer worker reinforce boundaries while maintaining trust?
- Are there any policies that need to be clarified regarding professional boundaries?

Section 3: Case Review & Discussion

- **Discuss any recent ethical dilemmas related to confidentiality or boundaries.**
- **Review how these situations were handled and identify alternative responses if needed.**
- **Apply an ethical decision-making framework to review challenges.**
- **Explore strategies for preventing future boundary concerns or confidentiality breaches.**

Example Case Discussion Topics:

- A peer asks the worker for personal contact information outside of work hours.
- A peer confides in the worker about illegal activity but asks for secrecy.
- A peer repeatedly seeks emotional support outside the peer worker's professional scope.

Section 4: Action Steps & Follow-Up

- **List any corrective actions or training needs identified during the review.**
- **Develop a plan to strengthen confidentiality and boundary practices.**
- **Schedule a follow-up discussion to assess progress.**

Reflection Questions:

- What steps can the peer worker take to strengthen confidentiality and boundary skills?
- How can the supervisor provide additional support in these areas?
- When will this topic be revisited in supervision to ensure continued adherence?

Reference: Adapted from SAMHSA's *Ethical Guidelines for Peer Support (2022)* and the National Association of Peer Supporters (*Confidentiality & Boundaries Best Practices, 2021*).