

Official website for the Idaho Psychological Association


[Home](#) | [Print Page](#) | [Contact Us](#) | [Sign Out](#)

Enter search criteria...

Search »

IPA Hip Tip: Professional Will

Share |

[Edit This Page](#)

My Profile

- » [Profile Home](#)
- » [Manage Profile](#)
- » [Create Resumé/CV](#)
- » [Networks](#)
- » [Files & Links](#)
- » [Favorites](#)
- » [Messages](#)
- » [Connections](#)
- » [Membership Info](#)
- » [Refer a Friend](#)
- » [Member Rewards \(New!\)](#)

Latest News

[more](#)
7/26/2017

Dr. Theresa Ross reappointed by Governor to Idaho's Board of Psychologist Examiners.

7/11/2017

Congrats to ISU Clinical Psychology PhD program!

3/13/2017

Two regional reps re-elected.

- Membership**
- About Us**
- Committees/Groups**
- Consumer / Media**
- Classifieds**



Volume 1 Issue 2 November 2015

PROFESSIONAL WILLS

It can happen in an instant—a fluke accident, a medical event, leaving a wake of concerned or grieving family and confused and abandoned clients. Who lets our clients know? Who takes care of vulnerable clients? Who knows who our clients are? Who should know? Do not leave this up to others!

Whether a considered closing of a professional practice or an unexpected event or closure, putting confidential processes in place for our clients is part of our ethical duty.

The American Psychological Association in the *Ethical Principles of Psychologists and Code of Conduct*, (<http://www.apa.org/ethics/code/index.aspx?item=13#1009>; <http://www.apa.org/ethics/code/principles.pdf>), incorporated as Rule in Idaho, addresses this in the following standards:

3.12 Interruption of Psychological Services

Unless otherwise covered by contract, psychologists make reasonable efforts to plan for facilitating services in the event that psychological services are interrupted by factors such as the psychologist's illness, death, unavailability, relocation or retirement or by the client's/patient's relocation or financial limitations;

6.02 Maintenance, Dissemination, and Disposal of Confidential Records of Professional and Scientific Work ; (c) Psychologists make plans in advance to facilitate the appropriate transfer and to protect the confidentiality of records and data in the event of psychologists' withdrawal from positions or practice.

10.09 Interruption of Therapy

When entering into employment or contractual relationships, psychologists make reasonable efforts to provide for orderly and appropriate resolution of responsibility for client/patient care in the event that the employment or contractual relationship ends, with paramount consideration given to the welfare of the client/patient.

A professional will, developed in consultation with your attorney or self-developed, is a critical piece for dealing with our ethical responsibility if we are unable to provide services ourselves. It protects our family and our clients at a time when both may be more vulnerable.

Like the guidelines concerning **Records Retention** (see **Hip Tips, Volume 1, Issue 1**) guidelines related to **Professional Wills** are far from straightforward with no standard content, but many resources and guides are available.

"Are You Prepared for the Unexpected?" (<http://www.apapracticecentral.org/good-practice/secure/2010-summer.pdf>) an article in APA Practice Management's 2010 Summer Issue of *Good Practice*, recommends a professional will and gives suggestions on what should be included. A Professional Will identifies the professional colleague (and backup) named to execute the closure and/or maintenance of your professional records. It advises that when developing a professional will be prepared to include names of consultants, a means to notify both current clients prior to their next scheduled appointment and past clients, referral sources, and support services including billing service, accountant, attorney, financial decision-maker. It recommends being mindful of the obligation you are establishing and includes

instructions regarding how to compensate or reimburse your practice executor.

Another outstanding resource is San Diego Psychological Association's *Guidelines for the Professional Executor* (http://sdpsych.org/guidelines_for_the_professiona.php). These guidelines provide detailed timelines and tasks to be completed by the Professional Executor that are immediate (same day/next day), short-term (second week and immediately beyond), Intermediate-term (first few months), and long term. A sample professional will developed by the San Diego Psychological Association with revisions by APAPO is attached to the end of this Ethical Hip Tip.

One of the major challenges which is often overlooked is the management of client records. They need to be kept confidential, accessible, and controlled regarding releasing records with appropriate consent. "Shutting Down a Practice" (<http://www.apa.org/monitor/feb03/howtoclose.aspx>), published in a 2003 issue of the *Monitor on Psychology*, (Vol 34, No. 2, p.32) addresses this issue along with other clinical, practical, ethical and legal issues in closing a practice. In addition to records management, tasks to consider including giving adequate notice, arranging for referrals, maintaining malpractice protection, appreciating issues regarding loss abandonment that some clients might experience, and dealing with one's own sense of loss and transition.

Sample Professional Will

*The Idaho Psychological Association Ethics Committee, as a member benefit, provides information regarding ethics as it pertains to the practice of psychology in the state of Idaho. If there is an issue or dilemma that an Ethical Hip Tip could address in a broad fashion please inform one of the members on the Ethics Committee. In addition, if you have any recommendations or corrections to this Ethical Hip Tip please let us know. **A big thank you to IPA Past President Sue Farber, who requested information that led to this Hip Tip, to Kathy Morris for her literature review, and to James Bruce for putting it all together!***

*For specific issues that require an ethical consultation, please contact of a member of the committee directly. Members of the IPA Ethics Committee include **Kevin Kracke**, Co-Chair; **Laura Asbell**, Co-Chair; **James Bruce**; **Kendra Westerhaus**; **Chris Edwards**, and **Bill Green**.*

The information presented in this article is for informational purposes only and does not constitute legal advice. There are a variety of ways to structure a professional will and your decisions will have legal implications. State and federal law may also limit or define how you can address some of these topics such as client records. Therefore, you should consult with your attorney and make the choices that are best for you.

Association Management Software Powered by YourMembership :: Legal