

## **Policies and Procedures**

UPDATED: August 2022

I want to outline my process, disclosures, expectations, and policies. This is a lengthy document but contains important information for our coaching relationship. As my New Client, I ask you to electronically sign this document to acknowledge that you understand and agree to its contents and will adhere to these policies and practices.

### **Safety Concerns:**

Some of my clients currently have an Unsafe Person/Abuser in their lives. These individuals may monitor my client's digital communication and read email or computer/hard-copy files. This might or might not be true for you. If not, please disregard the Safety Concerns language -- but if your circumstances change in the future, my systems already have some Safety precautions in place, which we will discuss verbally and activate so there is no written record that could be read by others.

Please consider your circumstances carefully and inform me as your circumstances evolve. I will leave your decisions regarding your safety to your best judgment.

### **Disclosures: Changes in Relationships**

Coaching often results in changes in current relationships, and I will help you learn to manage those issues. You may also notice that you are forming healthier new relationships. That can take some getting used to, and this process may bring discomfort or grief before it feels like you are healing. That's normal. I will be by your side. You are not alone. Trauma recovery coaching is not therapy or medical treatment. Jenny Seale is not a licensed mental health professional.

### **Privacy, Confidentiality, and HIPPA**

Although I am not required by law, I choose to implement many HIPAA-compliant practices for your benefit. All of my notes from coaching sessions, any information you send me, and all forms of identification and payment in my office are confidential and locked in physical security files, password-protected computer files, or stored on a HIPAA-compliant platform.

I have entered into Business Associate Agreements with Spruce Health, Quenza, MedForward, and Zoom, making these platforms HIPAA-compliant. My payment system, Stripe/Marketing360, provides security according to state, federal, and banking statutes/mandates.

I may converse with other coaches or mental health professionals in peer, and supervisory consultation situations, without revealing your identity to improve the quality of your care.

### **Secure Text Messaging and (Optional) Email - Spruce Health App/Platform**

I use a text service offered by Spruce Health to communicate with my clients (512-877-3233). Your messages always arrive in my Spruce account and are secure on my end.

You may choose to use the Text/SMS app that comes pre-installed on your phone to communicate with me and accept responsibility for any data breach on your phone. Or you may choose to install the Spruce Health App on your phone using this link: <https://spruce.care/jennysealecoaching>, which ensures the new account will automatically connect to Jenny Seale Coaching. Spruce will not charge you to use this service.

Email Your emails to [jenny@jennysealecoaching.sprucecare.com](mailto:jenny@jennysealecoaching.sprucecare.com) come to my Spruce account and are secure, while email messages to [jenny@jennysealecoaching.com](mailto:jenny@jennysealecoaching.com) come through Google Mail (Gmail). You may use either email address to communicate with me, understanding that communications to my Spruce Email address offer more security.

"I release Jenny Seale Coaching, LLC, from all liability issues and responsibility related to confidentiality as a result of my choice of communication methods and platforms. This includes initiating new communication or continuing any communication with Jenny on a platform that is not HIPAA Compliant."

### **Release of Information & Mandatory Reporting**

Please do not bring anyone to a coaching session (spouse, parent, friend) without discussing it with me first. If you want specific information to be shared with certain individuals, you must complete and sign a HIPAA Release of Information form. It is within your rights to request that I share certain information; however, I encourage you to consider your own physical and emotional safety when making that decision. This includes the presence of another person within the potential hearing range of discussions during our sessions (roommate, family, spouse, etc.).

As a Certified Trauma Recovery Coach™\*\*, I act as a Mandatory Reporter, as outlined by The International Association of Trauma Recovery Coaching. Limitations and exceptions to Confidentiality: A judge may issue a court order to release my records or

testify in court in some legal proceedings. I may or may not communicate this to you as legally allowed and at my discretion. If I learn of or believe that there is physical or sexual abuse or neglect of any person under 18 years of age, I must report this information to county child protection services. If I learn of or believe that an elderly person or disabled person is being abused or neglected, I must file a report with the appropriate state agency that handles elder abuse. I am obligated to report if I learn of or believe you are threatening serious harm to another person. This can be by telling the person you have threatened and/or contacting the police. If there is evidence that you are a danger to yourself and I believe that you are likely to harm or kill yourself unless protective measures are taken, I may be obligated to contact the person you have listed as your "Emergency Contact" or others who can help provide protection, including the police. There may be times when I consult with outside sources about cases. No personally identifiable information will be used to discuss this case in these cases. However, discussion topics will be used to ensure that I get and give the best assistance possible. The persons I discuss cases with are legally bound to keep the information confidential.

### **Expectations**

You can expect me:

- to be on time for appointments and during our sessions, to be 100% focused on our time together
- to be knowledgeable about trauma and up to date on the latest research about trauma
- to be your peer and guide through our time together
- to hold safe, non-judgemental space for you, your story, and your experience
- to never ask you to complete an activity I have never completed
- to offer client-led services; I know trauma, but you know yourself
- to honor your right to choose your path and use your voice
- to commit to serving your needs in a professional and loving manner
- to extend grace and empathy
- to celebrate you on this journey
- to meet you where you are in your healing
- to never use force, pressure, or guilt in our relationship
- to bring tools and strategies to our work so that you feel confident knowing you are "on the right path"
- and to gently but firmly enforce my Policies and Procedures, and the policies and commitments we enter into together with your purchase of my services.

My expectations of you:

- to come to sessions willing to work on your recovery within your current ability and skills

- to dedicate your focus during our coaching time on our work for the entirety of our session
- to let me know if you feel triggered during a session
- to be as open and honest with me as your current recovery and trust levels allow
- to engage in self-care to the best of your current ability
- to inform me of your needs so that I can maximize the support I give you to the best of my ability
- to set recovery goals with my assistance when you are ready
- to work toward meeting those goals at your own pace, with my assistance
- to let me know if anything in our relationship is uncomfortable
- to work with me under the assumption that you are in charge of your treatment and progress, that you always have voice and choice
- to adhere to the Policies and Procedures outlined in this document, in your New Client Forms and the terms of purchase for my Services, Sessions and Packages
- to complete and sign this document and the New Client Forms before our sessions begin.

### **Alcohol/Drugs and Cell Phone Usage**

Alcohol and Drugs: Please do not be under the influence of drugs or alcohol during our coaching sessions. It is difficult, if not impossible, to have a session worth the devotion of either of our time when you are under the influence. If you are struggling with any substance abuse issues, I welcome you to let me know so we can talk about it and work together to get you any help you might need. If you repeatedly come to a session under the influence but do not tell me or fail to acknowledge that you are impaired if I ask you whether you are, this may result in my ending our coaching relationship.

Cell Phone Usage: Please turn your cell phone off or leave it in another room during coaching sessions unless you use your phone to log into the session.

### **Scope of Practice and Credentialing**

There are some situations where I do not have the expertise to help you. If you are in a place where there are risks to your safety – you are suicidal, significantly self-harming, or in active addiction – the Association mandates that I help you find someone competent to deal with that particular issue. You do not have to stop seeing me, but we must bring in another professional with the expertise with whatever safety issue is at hand to help you with those issues.

\*\*Completing all IAOTRC Certified Trauma Recovery Coach requirements is a lengthy process, and the Association offers three levels of certification. I have completed the Initial Certification coursework, passed the Certification Exam, and submitted my

Portfolio. I'm only awaiting the final approval of my Portfolio by the IAOTRC in order to be fully certified. I have also completed the coursework for the Advanced Certification and am working on completing the full list of requirements for that level. In September 2022, I will be a candidate for the Supervisory level program. I have also, to date, completed approximately 20 hours of Continuing Education Units/Credits. I disclose this to my clients so they understand the credentialing process for IAOTRC Certified Trauma Recovery Coaches and have full knowledge of my trauma education and expertise. I uphold and follow all practices and standards that the IAOTRC requires of their Certified Coaches.

### **Grievance Policy & Termination**

I am required to let you know that I am a Certified Trauma Recovery Coach™ credentialed by The International Association of Trauma Recovery Coaching (see above section on the status of my credentials)\*\*. As a Certified Trauma Recovery Coach™, I am bound to uphold the Association's Code of Ethics. If at any time you feel I have failed to abide by the Association's Code of Ethics or wronged you in another way, you are welcome to contact Sarah Parish, TICC, CTRC-A, who is the Chairperson of our Professional Standards Committee (sarahparish@iaotrc.com). She can send you a grievance form to complete and submit and let you know the process that will take place after she receives your grievance. All reports and grievance actions are held confidential by the Professional Standards Committee.

You, as the Client, or Jenny Seale Coaching LLC, may terminate this Agreement and the Coach-Client relationship at any time with 1 week of written (including email & text) notice. The client may request via email a refund not more than 10 days after the termination date. Any request for refund after 10 days will not be considered. Under the agreement in every purchase of services ("All purchases are non-refundable."), Jenny may agree to or deny a refund request of any amount, at her discretion, and inform you of her decision in writing within 10 of receiving the refund request. Refunds will be initiated by Jenny Seale Coaching LLC within 60 days of Jenny's decision. Jenny's decisions on refunds are final. Access to Quenza will be revoked immediately upon termination. The client may obtain a copy of their completed Quenza Activities and Pathways by sending an email request to jenny@jennysealecoaching.com.

Jenny Seale Coaching reserves the right to terminate this agreement **immediately, and at Jenny's discretion**, should any issues of Jenny's safety occur (as perceived by her), or violations on the client's part of any policies, procedures, or commitments regarding payment, rescheduling/canceling of sessions/services that the client has agreed to services rendered through and by the date of the effective date. No refunds will be issued in this case. This agreement is terminated by Jenny Seale Coaching for all services,

including the client's access to their Quenza account, will be terminated immediately and without compensation to the client. The client may obtain a PDF of their completed Activities and Pathways by sending a request via email not more than 7 days after termination.

### **Quenza Assets**

Jenny Seale Coaching LLC retains sole ownership of, and all rights to, all Activities, Pathways, Files, Notes and Chats in the client's Quenza account. These assets may not be shared, duplicated, copied or distributed in any form without express written permission by Jenny Seale. Current clients (clients with an active Coach-Client Agreement) may request a copy of their completed Activities and Pathways at any time during the Coach-Client relationship for their personal records.

### **Emergency Contact Procedures**

As we begin our Coaching Relationship, I require that you provide me with an Emergency Contact name, phone number, and their relationship to you. By providing me with that information, you agree that:

- 1) You will inform your Emergency Contact that you have provided your information to me and share my phone number and email address with them.
- 2) I may contact that person at any time if I reasonably believe you are in danger of harming yourself or someone else.
- 3) At my discretion, I may contact that person if you abruptly cease communication with me at any time, and I have a reasonable belief that you might have or will come to some harm that would prevent you from communicating with me.
- 4) At no time will I share your Protected Health Information with your Emergency Contact, except in cases where your personal safety is at risk.