

ETHICS, RISK, AND DOCUMENTATION WORKSHEET

Slow Down Risk, Ethics, and Documentation Questions

A structured page for organizing safety concerns, mandated reporting questions, consultation needs, and documentation decisions before supervision.

This does not replace urgent consultation.

Use it to organize what needs attention and what steps are already required.

Use this when the stakes feel high or unclear.

When risk, ethics, or documentation feels messy, supervision is easier if you separate facts, concerns, policy, consultation, and next steps.

CLARIFY THE CONCERN

Name the risk, ethical question, or documentation issue.

TRACK OBLIGATIONS

Note agency policy, legal duties, and consultation needs.

DOCUMENT CLEARLY

Leave with defensible language and a practical next step.

HOW TO USE IT

Do not include client identifying details. If there is immediate risk, follow agency/emergency procedures before waiting for scheduled supervision.



Separate facts from clinical concern.

This helps supervision focus on judgment, obligation, and next action.

What happened, without identifying details:

What risk, ethical issue, or documentation question is present:

THIS MAY INVOLVE:

- | | |
|---|--|
| ☐ Suicidality or self-harm | ☐ Harm to others |
| ☐ Abuse, neglect, or mandated reporting | ☐ Domestic violence or coercive control |
| ☐ Substance use or impairment | ☐ Boundary or dual-role concern |
| ☐ Scope of practice or referral question | ☐ Confidentiality or release of information |
| ☐ Coordination with another provider | ☐ Agency policy vs. clinical judgment |



Map the consultation and documentation path.

Good supervision should help clarify what must happen, what should be documented, and what still needs consultation.

Agency policy, legal duty, or required procedure I need to consider:

Who I have consulted or need to consult:

What needs to be documented:

What should not be over-explained:

If you are unsure whether immediate consultation is needed, treat that as the question to escalate first.



Leave with a clear next step.

Risk and ethics supervision should reduce ambiguity about what happens next.

The supervision question I need answered:

The next action I will take:

What I need to monitor or revisit:

What I want help wording in documentation:

Want supervision with more structure and less shame?

Request a supervision fit consult with Chelsea and bring this worksheet to the conversation.

[Request a Fit Consult](#)

This worksheet is educational and does not replace emergency support, agency policy, legal advice, urgent consultation, or required supervision. If there is immediate risk or legal/ethical urgency, follow your agency procedures and seek appropriate immediate consultation.