Boundaries: A Door With Hours On It

Keep this. It's the whole course in writing: the four chapters, the ideas that came up, and where they come from. The test is open-handout.

Quick thing before you start. Probably a good idea to check your own agency's ethics and boundaries first. Makes sense, right?

H.E.L.P. is a fictional agency and its people are made up. Its policies (sponsorship kept separate from peer support, work phone for contact, no private paid rides) are story conditions, not Ohio rules. This course doesn't supply a complete emergency, confidentiality, reporting or documentation policy. Your own agency's policies are the ones that count.

How the hour is built

This handout, read through once	**15 min**
The video, four chapters with Cookie and the H.E.L.P. crew	**17 min**
Your call: three practice situations	**7 min**
The test: 15 questions, 12 to pass, open-handout	**15 min**
Course evaluation and certificate	**6 min**
Total designed time	**about 1 hour**

Designed time is the course read and done the way it's laid out. How fast you move through it is up to you.

Chapter 1 · The help they came for

Ray wants his license back and he's thinking about barber school. Tyler has three warehouse applications printed. Tyler has something practical to offer. He just hasn't checked whether it's the help Ray wants.

Start with the goal, the request, and the role

GOAL	REQUEST	ROLE
What's the person hoping for?	What help do they want from me?	What can I offer in this job?

These don't have to be three questions you read out loud. They're a check on whether you're working on the same thing.

Useful ideas can stay in the conversation

You could offer another option: "Want to hear another work option?" Then find out whether the person is interested. Ray still gets room to decide what he wants to explore.

Be accurate about what your help can do

Tyler can't promise Ray will be driving next month. He can check what the BMV requires and help Ray make the call. A boundary includes being accurate about what your help can accomplish.

Chapter 2 · Saying it out loud

A conversation aid for a boundary

ACKNOWLEDGE	LIMIT	OPTION	ASK
the request	explain the actual limit	offer an available one	what would help

Use your own words. If an option isn't available or confirmed yet, say that. You don't need to invent one to make the limit sound nicer.

Make contact expectations reliable

Tyler told Amber, "I'm here twenty-four seven." He can't actually promise that. A contact plan needs real details: when messages are checked, who provides any after-hours coverage, and what someone can do if they can't reach that contact. Correct an inaccurate availability promise directly: own it, explain your hours, and check the after-hours plan together.

Accurate hours. Real contact options. Clear emergency instructions. If an urgent message is seen, follow the applicable safety process. Explaining work hours doesn't replace an emergency response.

Keep experience relevant

You could ask whether a story would help. Ray said later, and Taco went with the BMV list. Someone can decline the story and still receive support.

Check additional roles before agreeing

Ray asked Taco to be his sponsor too. In this story, H.E.L.P. keeps sponsorship and peer support separate. Ohio's ethics rule prohibits additional relationships or commitments that conflict with the interests of people served. An unclear second role needs a proper check before anyone agrees. Taco can listen to Ray's disappointment while keeping the limit clear.

Chapter 3 · When to ask, when to act

An unclear role needs consultation. A clear restriction needs an honest answer. An emergency needs immediate action.

The expensive thank-you

Ohio's peer supporter ethics rule prohibits accepting or giving gifts of significant value from those served. The rule doesn't give a dollar amount, so the example is an expensive new tablet. Taco declines warmly: "You don't owe me a purchase."

The contact request

Explain the program's contact rule, then explore the problem the person is trying to solve. Amber isn't sure anyone has seen her messages. That deserves attention.

The familiar face

Crossing paths in a shared community isn't automatically a conflicting second relationship. Privacy still matters, including during an ordinary hello. Avoid revealing the service relationship in public.

The urgent interruption

Call 911 immediately. Give the location, answer the dispatcher's questions, and follow their instructions along with your emergency training and site procedures. Don't wait for routine supervision before getting emergency help.

The worried relative

Being a relative doesn't, by itself, settle what information can be shared. Privacy rules include specific permissions and exceptions, and different rules apply to different programs and records. Tyler stays neutral, takes a message, and checks the privacy process.

Bring observations to your supervisor

"I saw the offer; I didn't see what happened next" is useful information. Separate what you saw from what you don't know. Record relevant requests, observations,

actions, consultation and follow-up in your approved systems, and follow any applicable reporting requirements.

Chapter 4 · When you've already taken over

Repair an overstep

Name what you did, acknowledge the problem, invite the person's response, and follow through. Tyler told Ray: "I picked applications before asking what help you wanted. I got ahead of you." Then he asked what Ray wanted to find out first. Skip the long apology that ends with the other person reassuring you.

Keep the person's pathway in the conversation

Amber finds support at church, not meetings. Tyler asked what helps about it. Different people find support through different recovery pathways, and understanding hers gives him more to work with than comparing it to his own.

Don't make agreement the price of help

Darren tied rides to a warehouse application. Ray's "fine" doesn't tell us he chose that goal. A real service limit can be explained. Personal agreement isn't a fair condition to add. Darren later removed the condition, said so plainly, and took the transportation question and the follow-up to Val. He also turned down a private paid ride: in this story, H.E.L.P. doesn't allow it.

> What are we working on? What can you count on from me? Where does my role end? What happens if you need something else? We can answer those questions warmly and plainly.

Which kind of guidance is this?

- **Ohio requirements.** The ethics rule addresses confidentiality, undue influence, unwarranted promises, conflicting dual relationships, significant-value gifts and applicable mandatory reporting.
- **Professional principles.** Support the person's goals and respect different recovery pathways.
- **Suggested tools.** Goal, Request, Role. The four-part boundary aid. Asking before sharing a story. The repair wording. These are teaching methods, not required scripts.
- **H.E.L.P.'s fiction.** Sponsorship kept separate, a work phone for contact, no private paid rides. Don't treat these as universal Ohio rules.

Sources

1. Ohio Administrative Code, Rule 5122-29-15.1, paragraph (N), code of ethics.
2. SAMHSA, Core Competencies for Peer Workers in Behavioral Health Services.
3. SAMHSA, About Recovery (recovery occurs through different pathways).
4. U.S. Department of Health and Human Services, Understanding Confidentiality of Substance Use Disorder Patient Records ("Part 2").
5. National 911 Program, Calling 911.
6. Ohio Bureau of Motor Vehicles, Suspensions & Reinstatements.

The sample conversations and wording in this course are original teaching examples, not quotations from these sources. The stories told by Cookie and Taco are fictional teaching examples. No CEU approval, credit-hour or certification claim is made here.