Boundaries and dual relationships, on one page

What CRPO's standards require, crossing or violation, the common grey areas, a decision path and a worked example.

Study aid, not legal advice. Last verified against the official sources linked below on 11 November 2026.

1 What the standards require

- **Avoid dual relationships** with current clients, except in extenuating circumstances such as a small community (1.7.1), and with former clients (1.7.2).
- **Apply and document** ethical and clinical judgement before any dual relationship (1.7.3); keep boundaries online and in person (1.7.4).
- **Conflicts of interest**: assess them throughout; disclose and manage them, or refer (1.6).
- **No abuse** of any kind, and no undue influence over clients' decisions, wills or powers of attorney (1.8).
- **Sexual abuse**: zero tolerance. A person remains a client for five years after the relationship ends (O. Reg. 202/25, s. 1), and later too while a power imbalance remains (1.8).

2 Crossing or violation (1.8)

- **A crossing** departs from the strictest professional role; it can help, harm or be neutral.
- **Helpful**: clinically indicated, suited to the modality, with informed consent and safeguards, such as a home session for a client with severe agoraphobia.
- **A violation** is a crossing that puts the client at risk of harm, typically in an exploitative dual relationship.
- **Document** every crossing: its context, justification and safeguards.

3 Common grey areas

Situation	What CRPO says
Gifts	Can lead to a dual relationship (1.7); never to keep a third-party-paid client coming (1.6).
Self-disclosure	Avoid it when it is not therapeutic (1.7).
Social media	Personal profiles private; liking, friending or following can be a crossing (1.7).
Meeting in the community	Discuss it at consent and agree what to do when you meet (1.7).
Bartering	Avoid it: dual relationship and conflict risks (6.1.6).
Touch	Express consent every time (3.2.7); the same touch can help or harm (1.8).
Former clients	Weigh harm, power, the therapy, time passed, vulnerability, a likely return (1.7).

4 A decision path

1. Name the second role or the crossing, and whose need it serves.
2. Check the standard: a current or former client, a small community, a conflict of interest.
3. Weigh harm and power: vulnerability, the therapy, the time since it ended.
4. Avoid it if you can; if you cannot, discuss it with the client and agree safeguards.
5. Unsure? Ask a clinical supervisor, peers, legal counsel or CRPO.
6. Document the judgement and the safeguards before you act, and revisit them.

5 Worked example: the realtor

- Maya, an RP, ended eight months of therapy with Theo a year ago. Theo, now a realtor, offers to sell her condo at a reduced commission.
- **The role**: a financial relationship with a former client; a realtor is CRPO's own example of a separate professional role.
- **Weigh**: a long, intense therapy; a recent ending; a discount that ties the relationship to a favour; Theo may want to return to therapy.
- **Path**: decline warmly, take no discount, and keep the door to future therapy open (1.7.2).
- **Document**: the offer, the factors weighed and the answer given (1.7.3).

Ask whose need it serves, whether you could write it in the record, and whether it could be undone.

Official sources: CRPO Standard 1.7: Dual Relationships and Standard 1.8: Undue Influence & Abuse. Condensed from Professional Conduct and Ethical Decision Making Under Exam Conditions. Independent study aid, not legal advice, not affiliated with CRPO or COMPASS.