Ethical decisions, step by step, on one page

Seven steps to a decision you can defend, the signs that an issue is ethical, where CRPO's standards and Code ask for each step, and a worked example.

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

1 Seven steps to a decision you can defend

1. State the facts you have, and name the ones you are missing.
2. Name everyone with an interest: the client, a child, a third party, the public, you.
3. Classify each obligation: you must, you may, or you must not.
4. Name the Code principles in tension, such as autonomy and safety.
5. Find more than two options: to whom, how much, when, with what warning.
6. Test the leading option: legal, within your competence and role, the least intrusive, reasonable to a panel of peers.
7. Act, document, and review, with the client where it is safe.

2 Before step 1: notice it

- **A third party** wants information, or a say in the work.
- You are about to **use or share** what the client has not agreed to.
- **Someone may be harmed**: the client, a child, another person.
- **A second role** is forming: friend, employer, business, community.
- **You feel** relief, flattery, dread or irritation.
- **Money, gifts or benefits** are involved, or something is being written down or sent.

3 Where CRPO asks for it

Standard or principle	What it asks
Code: Integrity	Consult on ethical dilemmas; recognize and challenge your own biases.
Code: Responsible Citizenship	Consult on potential conflicts of interest.
Standard 1.5	Assess your actions as a panel of professional peers would; consult in challenging circumstances.
Standards 2.1.5, 2.1.6	Beyond your competence: clinical supervision or a more experienced colleague; refer if that is not enough.
Standard 1.7.3	Apply and document ethical and clinical judgement before any dual relationship.
Standard 2.1	Document conversations during case consultations.

4 Worked example: the choir board

- Lena, an RP in a small town, sings in the community choir. Sam, her client for six months, asks her to join the choir's board, which he chairs.
- **Facts and interests**: a current client; a social overlap already there; a board role under Sam's chairing. Sam's therapy comes first.
- **Obligations**: avoid dual relationships with current clients except in extenuating circumstances, such as a small community (1.7.1); apply and document judgement first (1.7.3).
- **Options**: join the board; decline it and keep singing, with safeguards; offer Sam a referral so she can join.
- **Test**: declining the board keeps the therapy intact and meets 1.7.1; the choir overlap is managed in the open, not hidden.
- **Act**: talk it through with Sam, agree how they greet each other at rehearsals, record the reasoning and the safeguards, and come back to it in later sessions.

A must is performed, a may is weighed, a must-not is never crossed. Write down why.

Official sources: CRPO Professional Practice Standards and CRPO Code of Ethics. Condensed from Ethical Decision Making Under Exam Conditions and The CRPO Code of Ethics in Practice. Independent study aid, not legal advice, not affiliated with CRPO or COMPASS.