



ALBERTA COLLEGE OF
SOCIAL WORKERS



PRIVATE PRACTICE

Guideline



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Private practice is the provision of social work services, on a full or part-time basis, by a registered social worker who is self-employed, a member of a partnership or group practice, or an independent contractor.

Social workers in private practice are autonomous and responsible for the quality of social work services and ensuring compliance with legislation, ACSW's Code of Ethics and Standards of Practice. Services in private practice are provided on a fee-for-service model that is mutually agreed to by a client, a third party (like an insurance company, employee assistance program or organization), or as set out in a contract. (Adapted from the Newfoundland and Labrador College of Social Workers.)

Each business situation is unique. We encourage you to seek business and legal advice from appropriately trained professionals. Because of the many possible corporate, legal and business arrangements involved in private practice, the ACSW will not give an opinion on specific situations.

PURPOSE

Establishing a private practice is a complex process requiring you to be aware of relevant legislation, regulation, and any associated standards of practice. This guidance is designed to educate you about the professional responsibilities associated with private practice.

ESTABLISHING A PRIVATE PRACTICE

Before entering private practice, you must meet the requirements for registration on the general registry and then reflect and evaluate whether private practice is a good fit.

BUSINESS MODEL AND SERVICE DECISIONS

Registered social workers practice in a variety of environments with different client populations. There are many private practice models such as sole practice, group practice, contracting and more, with pros and cons to each. It is your responsibility to consider what business model to choose and its risks and benefits. This includes careful review of any contracts.

Anyone intending to establish a private practice must be familiar with what is allowed in the *Health Professions Act*, Part 5, Business Arrangements, and in ACSW's Code of Ethics and Standards of Practice. You must also be satisfied that you will be able to uphold those standards while working within a group practice or for another business.

The following sections explore ACSW's Standards of Practice in relation to private practice.

PROFESSIONAL PRACTICE (STANDARD E)

You must continually assess your knowledge, skill and judgement, which together add up to your competence, to determine whether you are equipped to work with particular client populations, provide specific services or interventions, or engage in private practice.

Post-secondary social work education provides the necessary foundation to begin practice in social work. On its own, though, it's insufficient to prepare you to be competent in all areas required for private practice. Preparation for private practice develops over time as knowledge, skills and experience are gained.

Prior to entering private practice, you are strongly advised to consider your individual competence in the area you're choosing to focus your practice. This may mean that after reflection, you limit the services you provide, the populations you serve or the interventions or activities you perform. It may also mean acquiring additional education and experience and/or supervised practice.

The HPA defines competence as, "the combined knowledge, skills, attitudes and judgement required to provide professional services."

Social workers in private practice must have the appropriate educational preparation, significant and current social work experience and a network of appropriate professionals for supervision, consultation and referral.

You must be knowledgeable in many areas beyond the focus of the practice itself before establishing a private practice.

This includes but isn't limited to:

- Working with mandated or involuntary clients
- Dual relationship and conflicts of interest
- Managing boundaries
- Managing privacy and privacy breaches
- Working with third parties
- Insurance requirements (professional and general liability insurance)
- Working with vulnerable and racialized people including 2SLGBTQI+, Indigenous, BIPOC, and disability communities
- Contingency planning for your practice
- Leaving or closing a practice
- Documentation and file management
- Managing and supervising staff
- Competence in business practices
- Accessing consultation and supervision
- Informed consent and confidentiality
- Working as a contractor

CONSULTATION AND SUPERVISION

Competence is acquired and maintained throughout your career as part of professional practice through a variety of learning methods, including but not limited to, consultation and supervision. All social workers, particularly social workers in private practice, benefit from consultation, and in some cases, supervision from colleagues. These terms are often used interchangeably, but each has a different meaning and accountability.

Consultation

The Standards of Practice define consultation as “a problem-solving process in which professional expertise is offered to an individual, group, organization or community.” In a professional practice context, consultation is a process that occurs between two or more professionals, where one is seeking help, insight, or assistance regarding a particular matter or problem. The focus is narrow and specific, and the resulting advice or guidance provided may or may not be put into action.

Supervision

The Standards of Practice define supervision as “the professional relationship between a supervisor and a supervisee that includes evaluation and direction over the services provided and promotes the continued development of the supervisee’s knowledge, skills, and abilities to provide services in an ethical and competent manner.” In a supervisory relationship, the supervisor is responsible and accountable for the supervisee’s practice and can provide direction that the supervisee must follow.

*Supervision and consultation have different structures and accountabilities.
Supervision may include consultation. Consultation is not the same as supervision.*

When developing competency in a professional service or technique, or returning to social work practice, you are advised to engage with other social workers or suitable professionals who are knowledgeable in that area.

Determining whether supervision, consultation or both are required is your responsibility, based on your practice, the legislative requirements, and assessment of the risk associated with that practice.



RECORD KEEPING AND CONFIDENTIALITY (STANDARD D)

As a social worker working privately, either in your own practice or by contracting out your services, you are accountable for documenting and maintaining your own records. You must follow the expectations outlined in the standard for Record Keeping and Confidentiality, including determining which privacy legislation record keeping requirements must be complied with.

PROTECTION, PRIVACY AND SECURITY OF ELECTRONIC RECORDS

The management of information – including documentation and retention of records related to client care and services, as well as business activities and transactions – must be done in alignment with provincial legislation, regulation, and standards of practice. You are personally responsible and accountable for ensuring you comply with the legislative requirements. These requirements include determining the need for and conducting a privacy impact assessment; developing policies and procedures regarding the collection of information; and the use, disclosure and security of personal and health information.

In private practice, you must have data management policies in place and available should clients wish to review them.

CLIENT ACCESS TO RECORDS

Clients have a general right to access their own records, and as permitted or required by legislation, you should provide access to and disclosure of client records to clients. In private practice, you must ensure policies and processes are established and available to clients to ensure and enable client access to records in accordance with the Standards of Practice and any legislative requirements or restrictions.

You must establish practices consistent with relevant privacy legislation, such as but not limited to the Health Information Act (HIA), Access to Information Act (ATIA), Protection of Privacy Act (POPA), Personal Information Protection Act (PIPA), etc.

When you operate a private practice which engages with social workers to provide professional services, you must consider the nature of the employment relationship with them, ensuring ownership and management of client records is clearly defined and managed.

ACCESS TO CLIENT RECORDS BY OTHERS

Occasionally, you might receive third-party requests for information; for example, from third-party payors, or insurance companies. When you receive a request to release information to any third party, you must obtain the client's informed consent to do so, unless a legal exception applies. When compelled to disclose client information for a legal proceeding, you are permitted to produce records without consent if served with a court order, subpoena or other direction from a court, professional regulator or other authority. In addition, if called as a witness during a hearing, the judge or adjudicator can direct you to disclose the records or provide testimony about your involvement with your client. In those circumstances, you should exercise caution and consult your legal advisor to determine the best way to respond.

RETENTION OF HEALTH RECORDS

You have an ethical and legal responsibility to safeguard your clients' information, including securing records or files, retaining records in accordance with applicable legislation and standards, and establishing an estate plan for records in case of an unforeseen event, such as a medical event resulting in your incapacitation or death.

PRIVACY BREACHES

Privacy breaches can occur in several ways. Some of the more common incidents include:

- **Loss or theft of mobile devices** (such as laptops or USB sticks)
- **Misdirected communications** (via email, text, fax or mail)
- **Employee “snooping” of client records** (also known as unauthorized access to or misuse of client information by an employee)
- **Hacking** of computers, servers and websites
- **Malicious software** (malware) attacks, including ransomware
- **Phishing or social engineering attacks**
- **Failure to wipe hard drives** of computers and other devices prior to them being resold or disposed of
- **Stolen paper records** from an employee's vehicle, home or office
- **Improper disposal of records** or devices

Working in private practice, you are expected to be aware of any relevant privacy legislation and its requirements, and have policies and procedures in place should a privacy breach occur. This includes reporting to the Office of the Information and Privacy Commissioner of Alberta any unauthorized access to, or disclosure of, individually identifying personal or health information by yourself or anyone else in your practice.

FEES AND STATEMENTS (STANDARD C)

FEES AND BILLING

The Alberta College of Social Workers is responsible for setting and enforcing standards on fees. However, the HPA prohibits ACSW from setting fees that social workers may charge for professional services. When establishing fees, you must ensure:

- **Fees and fee policies are clearly outlined** to the client prior to providing services, as you also have an obligation to obtain and document a client's consent for fees prior to service delivery.
- **Fees charged are justifiable.** Professional services offered on a sliding scale, which would make services more affordable, are permitted.

You may bill for services provided by a student in your private practice. The billing must be clear about who provided the service. Refer to the [FAQs](#) for more detailed information on fees.

PROFESSIONAL ACCOUNTABILITY (STANDARD G)

ADVERTISING AND USE OF TITLE

Advertising is one component of marketing a private practice and is an important aspect of business growth and sustainability. Examples of advertising and public communication include, but are not limited to, brochures, directory listings, websites, social media, radio, television, lectures and other public presentations, resumes, professional correspondence and published materials, etc. Ethical marketing is described as the responsible promotion of professional services to potential clients in a way that respects their autonomy, privacy and dignity while avoiding any harm or undue influence. Ensure that advertising does not exploit clients' vulnerability and lack of knowledge. You must safeguard client privacy and should not post potentially identifiable client information online. Additional information is available in the private practice [FAQs](#).

It is important that the advertising does not make claims which cannot be demonstrated as true. ACSW recommends against using client testimonials in advertising. If you advertise using a third-party platform, ensure that the content and use of title is both acceptable and accurate.

*The Health Professions Act outlines that
"A regulated member shall not engage in advertising
that is untruthful, inaccurate or otherwise capable
of misleading or misinforming the public."*

**You must comply with the
*Social Work Profession
Regulation and relevant
standards of practice.***

**In any advertising and on
request, you should, at minimum:**

- Provide a clear and honest statement of the academic qualifications relevant to your field of practice
- Display or produce a current practice permit
- Identify the jurisdiction(s) where you are licensed to practice
- Ensure that the use of title(s) after your name in communications aligns with ACSW Standard G.4, is accurate and reasonably informs the public of the titles' relevance to the field of practice
- Ensure the public is clear about your registration status if you're on the provisional registry

GENERAL PRACTICE REQUIREMENTS (STANDARD B)

Hazards and risks are an inevitable part of professional practice. You are responsible for identifying and assessing risks and mitigating their impact. Advice from experts in law, accounting, technology and cybersecurity may be necessary, depending on the circumstances.

EMPLOYING STAFF

If you hire staff, you must adhere to the *Alberta Labour Code* and must develop policies that address human resource management, handling of client concerns, supervision of staff and overall quality of care.

PROFESSIONAL LIABILITY INSURANCE

Registered social workers require professional liability insurance coverage as outlined in the *Health Professions Act*. Being in private practice means you may need additional general and professional liability insurance to protect yourself professionally. Determining your insurance requirements includes considering what professional services you provide and the risk associated with those services. Some areas of social work practice carry higher risk than others. Consider consulting with experts in the insurance and legal field. At minimum, social workers are required to have \$5,000,000 in liability insurance as well as legal defense coverage in the case of a professional complaint or disciplinary proceeding.

OUT OF PROVINCE PRACTICE

Providing professional services to clients outside of Alberta requires you to investigate and comply with registration requirements in other jurisdictions. This includes being registered with other social work regulators as well as registration related to specific professional activities (such as psychotherapy). Providing professional services to Albertans residing temporarily in other jurisdictions may require you to register with the relevant province. You must use professional judgement to determine the appropriate provision of emergent or crisis services to a client who is out of province. You are also advised to consult with professional liability insurers regarding coverage for out of province practice.

VIRTUAL PRACTICE

Virtual best practices continue to evolve and develop and require additional knowledge and skills. You are expected to have sufficient knowledge and skills both in the therapeutic modality and in the use of the technology employed. You are advised to consider your liability insurance coverage to determine whether it is sufficient to cover virtual practice and whether it covers provision of service to clients outside of Alberta. You're also advised to consider and document additional informed consent elements when providing services virtually. An informed consent conversation for virtual service should include consent for services that cannot be provided virtually, technology requirements associated with virtual practice, and limitations on professional services and activities should the client temporarily leave the province.



USE OF TECHNOLOGY

Technology and the use of technology in the delivery of professional services continues to grow and evolve. Use of technology refers to digital or other electronic means used to provide information to the public, deliver services to clients, communicate with and about clients, and manage confidential information.

This use of technology includes but is not limited to:

- Telephone
- Email
- Text messaging
- Instant messaging platforms
- Webcam
- Computer/software applications (apps)
- Online office/practice management software for functions such as intake, documentation, billing, online scheduling
- Blogging
- Podcasts
- Use of artificial intelligence (AI)
- Social media
- Virtual reality
- Online forms of evaluation or assessment

You are expected to:

- **Understand the risks and limitations** associated with the use of a particular technology
- **Ensure clients are aware** of those risks and possible alternatives as part of the informed consent process
- **Demonstrate competence** with technology used in the provision of services
- **Comply with any legislative, regulatory or practice** expectations regarding the use of technology
- **Access supervision or consultation as required** when introducing a new technology to your practice

CONFLICT OF INTEREST

If you're engaged in private practice while also working as an employee, you need to be aware of potential ethical implications and ensure your employer's conflict of interest policy is not violated. You'll need to ensure that you are not leading clients to your own independent business while working for an organization. When in private practice, you must adhere to standards of practice relating to dual relationships and avoid or mitigate actual and perceived conflicts. You should be aware that selling or recommending products or services can result in a conflict of interest if you stand to benefit.

MAINTAINING BOUNDARIES

You must establish appropriate boundaries and demonstrate self-awareness in professional practice. Maintaining boundaries includes outlining policies to clients about business hours and the use of electronic communication. You should also consider potential boundary implications for both yourself and your clients when operating a home-based practice. You should have a separate business telephone number and email address to maintain professional boundaries.

CLOSING OR LEAVING A PRACTICE (STANDARD B)

When running a private practice, you might close it in a planned and intentional manner, or it may cease operations due to unforeseen circumstances. It's expected that as a social worker in private practice, you have plans in place to manage absences including vacations as well as practice closure.

CONTINUITY OF SERVICES FOR EXISTING CLIENTS

You must ensure that a plan is in place for clients who require ongoing social work services if your practice closes. This plan should include referrals as appropriate, and access to emergent service if required due to gaps in service continuity. The discussions and follow-up plan must be documented in the client record.

PROFESSIONAL WILLS

The incapacitation or death of a social worker is an event with profound ramifications for families, friends and clients. There are many legal, ethical, clinical and personal issues for you to consider. When there is advance warning of a disabling condition or death, you're able to plan. In some cases, there will be no advance notice. Ensure provisions are in place that protect clients, such as creating a professional will. A professional will involves naming an executor, specifying the location(s) of your records, passwords, and anything else necessary for access to your client and business records to ensure continuity of care and business obligations.

When taking a leave or closing a practice, ensure that documentation is up to date and records are stored and retained securely according to any requirements and retention periods outlined in legislation and practice standards.

You should consult with legal experts to discuss options for contingency planning that include:

- **Risk assessment**
- **Strategies to reduce potential harms** for each identified risk area (including client communication, continuity of care, access to records, record management and security)
- **Ensure plans are compliant with legislation, regulation and practice standards**
- **Finalize, authenticate and communicate** the plan

Contingency planning is not only about protecting the practice's physical and financial assets. More importantly, it addresses your ethical responsibility to provide confidential, uninterrupted, and professional care in the event something unexpected happens. By identifying and proactively mitigating risks, contingency planning can safeguard a private practice's future and maintain the trust of your clients.

APPENDIX A: AREAS OF PRIVATE PRACTICE

This appendix provides you with descriptions of areas of practice that could be provided in a private practice context.

AREA OF PRACTICE	DESCRIPTION
Clinical Consultation	Providing subject matter expertise, advice and feedback on a case-by-case basis or on a general basis to a group of practitioners in a specialized area such as child protection. The advice may be carried out or not.
Clinical Practice	<p>Providing specialized direct client care that focuses on the assessment, diagnosis, treatment, and prevention of mental illness, emotional, and other behavioural disturbances. Individual, group and family therapy are common treatment modalities.</p> <p>While clinical practice is not a protected scope of practice, use of the title clinical social worker is limited to those who are on the clinical registry.</p>
Community Development	Providing services and activities with a primary focus on helping communities become more resilient, equitable and connected. Examples include community gardens, collective kitchens, affordable housing initiatives, etc.
Direct Client Care	Providing professional services and interventions designed to bring about personal, interpersonal or structural change. Clients or receivers of a service may include an individual, couple, family, or group. An example is supporting a family to address unmet social needs for housing and financial support.
Education and Training	Providing seminars or workshops in an area in which you have expertise to targeted groups, organizations or communities.
Institutional Education	Providing education in a post-secondary context to individuals registered in formal education programs. This could include sessional instructors and those on contract, but not employees of the organization.
Organizational Consultation	Advising on program design, restructuring, operational evaluation or review of an agency, strategic planning, and/or policy development.
Supervision	Engaging with a supervisee through a contractual relationship to provide direction of care and/or services and interventions; promoting the professional growth of the supervisee; enhancing their safe and effective use of self in the client relationship; and safeguarding the well-being of the client to meet registration, credentialing, or competence requirements.

APPENDIX B: BIBLIOGRAPHY

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PRIVATE PRACTICE FAQs

STARTING A PRIVATE PRACTICE

1. Do I need a certain level of social work education before I open a private practice?

Currently, the College does not have specific educational requirements you must possess before establishing a private practice.

The ACSW recommends that those entering private practice have a Master of Social Work (MSW) and at least five years of social work experience relevant to the proposed area of practice. Additionally, the ACSW recommends that you have completed provisional hours prior to establishing a private practice.

You must be able to demonstrate an appropriate knowledge base with the population, service, activity and interventions you're providing in your practice along with significant and current practice experience and supervision in the area of practice.

It is also important you have a robust network of professionals for consultation and referral.

You must also consider the legal responsibilities for your private practice, including ensuring you have the evidence to support that you are providing the expected standard of social work service, and evidence that the client has received this standard of care.

Ask yourself:

- What is the standard of care nationally?
- What is the industry level of education needed to provide the identified intervention?
- How would my peers in this area of practice assess my practice?
- What evidence can you provide to substantiate you have the required competence to establish a private practice in a particular area of practice?

Before establishing a private practice, review the private practice guidance, talk with other social workers in private practice and consider discussing your plan with the ACSW.

2. I am a provisionally registered social worker. Can I have a private practice?

Social workers entering private practice must hold an active practice permit on the general registry. (Learn more about [provisional registration here.](#))

Private practice is not an entry-to-practice activity. While the draw to private practice may be strong, practicing in isolation can affect safe practice for new graduates, those new to practice in the Canadian context, or those returning to practice after a period of inactivity.

Joining an established organization or practice as an employee offers you the opportunity to gain experience, connect with colleagues, and determine your niche or area of practice.

3. **How do I know if I am competent to establish a private practice?** The decision to enter private practice is one that should not be taken lightly. You must be able to demonstrate competency in the chosen services, interventions or activities being provided. You are responsible to assess your education, experience and supervised practice relative to the services you offer. The ACSW recommends that those entering private practice have a Master of Social Work (MSW) and at least five years of social work experience relevant to the proposed area of practice.
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4. **Can I operate my private practice in other provinces without registering with the social work regulatory college of that province?** If you operate a private practice that offers services to clients in another province, you are responsible to understand the registration requirements in that province. Most provinces have mandatory registration for social work, which means that if you are practicing in the scope of social work practice in that jurisdiction and are eligible for registration, you must be registered. In some provinces, the activity of psychotherapy is regulated under a different college, such as the College of Registered Psychotherapists of Ontario. You must be aware of the regulatory landscape in the province in which you wish to practice.
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5. **How do I determine the kinds of services, activities or interventions to offer as part of my private practice?** It is your responsibility when considering private practice to assess your own competence to work independently. The CASW Code of Ethics (2005) asserts that “Social workers have a responsibility to maintain professional proficiency, to continually strive to increase their professional knowledge and skills, and to apply new knowledge in practice commensurate with their level of professional education, skill and competency...” (p. 8)
- The following are some questions you may want to consider.
- What are the best evidence-informed practices relevant to the population I plan to serve or the activities or interventions I plan to deliver?
 - What is my experience in the practice area I am interested in pursuing?
 - What formal training or continuing education have I completed to ensure that I have the appropriate skills, knowledge, and competencies to practice in this area?
 - How will I develop and maintain competence in the full range of activities, interventions and services I plan to offer?
 - What are my identified gaps and how will I address them?
 - Are there practice resources, standards or guidelines that I should be knowledgeable about?
 - How will I obtain consultation or supervision?
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6. What kind of professional liability insurance do I require? All registered social workers require professional liability insurance. The College has no other specific guidance on liability insurance; however, you may wish to discuss additional general liability insurance and other coverage (such as cyber coverage) if you have a private practice. It is prudent to discuss your situation with an insurance professional.

7. Can I hire other social workers or health professionals if I have a private practice? You can hire or work with different health professionals. Other regulated health professionals would follow professional expectations from their own college. Clients should be made aware of what services they are receiving, from whom, how information is shared, and any limits on activities or interventions that can be provided.

8. Can I operate a private practice from my home? There is no College standard or policy that prevents you from operating a private practice from an office that is also located in your home. However, your municipality may have relevant bylaws or regulations related to the operation of a business (especially if clients are physically attending the place of business). It is advised that this be explored prior to establishing a residential office.

Other questions to ask yourself include:

- What is the service I am offering and who is the population being served? What are the potential risks associated with the service and/or population?
 - How will I manage boundaries and privacy, both for myself and for my clients?
 - Where in my residence will I conduct my business and is it accessible, appropriate, and safe for myself and clients?
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9. Can I have a private practice if I am employed with an organization or agency? In other words, in addition to my regular employment? While in private practice, you can also have employment with organizations providing health or social service delivery. A common dilemma for some social workers is whether they can see agency clients privately.

It is important that social workers engaged in private practice, while being employed with organizations, consult with their agency regarding conflicts of interest policies. You must ensure that this does not contravene any contractual obligations and does not pose a conflict of interest. Some employers require employees to disclose and review any outside employment for potential conflict of interest.

LEAVING A PRIVATE PRACTICE

10. If I leave a private practice, can I ask clients to follow me to my new practice?

Deciding to leave a private practice and how to manage existing clients can be a complex decision. Consider the following:

- Any existing contractual obligations including a non-solicitation or non-compete clause.
- Autonomy and self-determination. Clients should have the right to choose their provider and asking them to follow you may create a situation where they feel unduly influenced and unable to exercise autonomy.

Consulting a lawyer with these types of contractual questions is always advised.

11. Can a private practice charge me a fee to take my clients to my new practice?

Review the terms and conditions of any contract you signed. Some contracts include client transfer fees where the practice owner may require payment if you continue seeing clients who originally came through their business. Consulting a lawyer with these types of contractual questions is always advised.

FEES AND BILLING

12. Why doesn't ACSW establish a private practice fee schedule?

The *Health Professions Act* does not permit regulatory colleges to set professional fees, provide guidelines for professional fees, or negotiate professional fees on behalf of some or all of its regulated members.
([Health Professions Act](#), RSA 2000, c H-7 3(2))

13. Can I take a client's credit card information to input into billing software?

Yes, in private practice you can enter a client's credit card information into a billing system. Consider the following:

- Is the client aware and do you have the client's consent?
- Does the billing system meet industry privacy and security requirements and standards?
- Are you using a secure platform?
- Can you limit access to the system?
- Are you maintaining up-to-date and accurate records of consent, payment processing and communication?

14. Can I offer a promotion to increase my clientele?

You are permitted to offer a promotional rate to clients; however, it is important to avoid potential risks. These risks may include an offer that promotes unnecessary treatment, unduly influences a client's decision to receive treatment, or acts as a barrier once the promotional rate ends. It is not permitted to offer a discount for prompt payment, such as an early bird rate.

Discussing practice about promotional fees and packages is part of informed consent and any variance to the usual fee schedule should be documented.

15. Can I offer gift cards?

ACSW recommends gift cards not be used due to the situations that might arise.

If you are considering offering a gift card, anticipate how you might handle possible situations that might come up.

- Unbeknownst to you, a current client of yours purchases a gift card for a member of their family. The family member contacts you to book an appointment using the gift card. How would you handle this conflict-of-interest situation?
- A client wants a refund for a gift card. How do you handle this?
- Years later when you are working in a different capacity, a former client wants to use a gift card. How do you handle this situation?
- The recipient of a gift card wants to use it to book services, but their needs don't match what you can provide. How do you handle this situation?

While selling gift cards is not prohibited, there are risks and you must be clear on how you will handle situations that may arise and ensure continued alignment with best clinical practices and the Standards of Practice.

16. Can a student or supervisee at my private practice charge fees?

If you and the students comply with any professional, credentialing or academic requirements, students and supervisees can charge a fee for services. You and your students or supervisees must ensure that the client understands what is included in the fees they are paying, document client consent in the client record, and indicate the reason or reasons why a fee may have been reduced or waived.

The following information should be included in financial records:

- Clear identification of the person(s) providing the service and their title
- Clear identification of the client to whom the service was provided – client's full name and address, and unique identifier (if applicable)
- Identification or description of the service provided
- Cost of the service
- Date and method of payment received
- Fees charged for services provided by supervised personnel

Students and supervisees may not use the title social worker or any other protected title unless they have appropriate authorization to do so.

ADVERTISING

17. Can you email individuals to solicit business (such as following up on a free consultation with someone who did not rebook)?

The ACSW does not have specific guidance about following up with potential clients. Before contacting individuals who have inquired about your services, but not booked or engaged in your services, consider:

- Will the individual feel unduly pressured?
- How will you communicate the individual's freedom to choose to engage with your services?
- How many times would it be appropriate to follow up with a potential client before ceasing email communication?
- How can individuals unsubscribe from your emails?

18. Is it appropriate to include personal information about myself, my family, and my relationships on my website and in my advertising?

The ACSW expects you to be aware of how your personal representations may reflect on the profession. This includes considering what type of content is appropriate to place in a public medium. The ACSW does not have specific guidance about self-disclosure as part of advertising your private practice. As a registered social worker, consider the following when establishing your advertising:

- What is the intention or purpose of the disclosure?
 - How might the disclosure impact your professional relationship with the client?
 - How personal is the disclosure you're contemplating?
 - How will you manage boundary setting with a client who is seeking additional disclosure from you about other personal matters?
 - Is the information what you would share with a client if you were in person?
 - What are any potential risks or impacts for you and your family because of the disclosure of personal information?
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19. What do I do if I advertise on third-party platforms whose descriptions or categories of practice are misleading or incomplete?

You are expected to identify and describe education, training experience, professional affiliations, competence, nature of your service and your actions in an honest and accurate manner. If you're considering advertising on a third-party platform, you should consider:

- Does this platform use language that could be misleading and how might I mitigate it?
 - Can I have the platform correct the problematic language?
 - Are there other platforms I could use to advertise?
 - How can I ensure my description is clear and not misleading in any way?
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20. Do I have to use the term social work in my advertising? Can I use the term mental health therapist, counsellor or consultant depending on my practice?

All registered social workers who are working within the scope of social work practice must hold an active registration and must ensure clients know they are registered social workers. Clients should also know as part of the informed consent process of their right and ability to file a complaint with the ACSW.

If you are providing a service that commonly uses another descriptor, like mental health counselling or consulting, consider the following titling options:

**Jiminy Cricket, RSW
Mental Health Therapist**

OR

**Jenny Cricket
Registered Social Worker
Addictions Counsellor**

This displays both your professional designation and your role.

RECORD KEEPING

21. Can I use artificial intelligence (AI) to create a session summary?

Using AI in professional social work practice can offer powerful tools, but also raises important ethical, practical and relational considerations.

Consider the following:

- Does the AI tool protect client data in accordance with privacy laws (e.g., *Health Information Act, Protection of Privacy Act, Access to Information Act, Personal Information Protection Act*)?
- Are clients aware of how AI is being used and what it means for their data or decisions?
- Could the AI reinforce systemic biases or exclude marginalized populations?
- What is the AI being used for?
 - Administrative support such as scheduling or documentation?
 - Clinical decision support?
 - Risk assessment or predictive analytics?
- Is it replacing or augmenting human judgement?
- Can you explain how the AI works to clients or colleagues?
- Who is responsible if the AI makes an error or influences a poor decision?
- Is there a human review process in place?
- Do you understand the tool well enough to use it responsibly?
- Have you received training or guidance on ethical AI use?
- Can you critically evaluate its outputs?

If you choose to use AI in delivering a professional service, you are still accountable for the substance of the note or document. If AI is used, you must still review and finalize the document.

If a client does not provide consent, you may not use AI.

CONSENT

22. Does private practice have special requirements around informed consent?

The ACSW Standards of Practice outline the requirements around informed consent. Whether you are in private practice or employed by an organization or agency, the consent requirements are the same.

Consider the context and information a client would reasonably expect to receive about the services you provide and how you provide them in order to ask questions and make an informed decision about consent.

CONTINGENCY PLANNING

23. When appointing a professional executor,

- does the executor have to be a registered social worker or can they be another regulated professional?
- do they have to be a regulated health professional?

A professional executor does not have to be a registered social worker or a regulated health professional. However, think about what will be asked of your professional executor and who might be best suited to ensure your professional will is carried out. If they are unable to carry out the professional activities, you should ensure individual(s) are identified who can provide the professional service.

Consider the following when determining your executor:

- Do they have a comprehensive understanding of social work practice and the specific requirements of your area of practice? This might mean choosing a colleague or a medical professional who understands the nuances of running a private practice.
 - Is a regulated health professional necessary to make certain decisions or handle specific aspects of your practice?
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CONSULTATION AND SUPERVISION

24. Are mentoring and coaching the same as consultation and supervision?

Mentoring, coaching, consultation and supervision can often be used interchangeably; however, they are distinct activities, used for different purposes with different accountabilities.

Mentoring

Mentoring describes a relationship in which a more experienced colleague shares their greater knowledge to support the development of an inexperienced individual. Mentoring is typically a long-term, relationship-based process focused on career development and personal growth. Its goals are twofold:

- transferring knowledge and skills
- offering an opportunity for emotional support, confidence-building, and networking

Coaching

Coaching is a collaborative process focusing on specific skills and goals mutually defined by the coach and coachee. It is a structured, goal-oriented process that is typically performance-driven and focuses on specific results within a set timeframe.

Consultation

The Standards of Practice define consultation as “*a problem-solving process in which professional expertise is offered to an individual, group, organization or community.*” In a professional practice context, consultation is a process that occurs between two or more professionals, where one is seeking help, insight, or assistance regarding a particular matter or problem. The focus is narrow and specific. Advice or guidance provided may or may not be put into action.

Supervision

The Standards of Practice defines supervision as “*the professional relationship between a supervisor and a supervisee that includes evaluation and direction over the services provided and promotes the continued development of the supervisee’s knowledge, skills, and abilities to provide services in an ethical and competent manner.*” In a supervisory relationship, the supervisor is responsible for the supervisee’s practice and can provide direction the supervisee must follow.

PRIVATE PRACTICE FAQs CONTINUED

- 25. Will ACSW offer sessions on establishing a private practice, the legal requirements, record keeping, fees and billing?** No, the ACSW will not be offering sessions on starting a private practice. The ACSW does offer consultations regarding the Standards of Practice and Code of Ethics. Consider exploring resources offered through the [Social Workers Association of Alberta](#) (SWAA) and the [Canadian Association of Social Workers](#) (CASW).
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- 26. How can I connect with social workers in private practice?** If you are considering establishing a private practice or have a private practice, consider reaching out to [SWAA](#) to connect with other social workers in the same area of practice.
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- 27. Where can I get consultation or supervision from someone about private practice?** If your question is about the Standards of Practice or Code of Ethics, ACSW offers a consultation service. If your question is about how to establish or manage a practice, consider reaching out to [SWAA](#).
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ACSW

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