LIFEWISE
COUNSELING AND WELLNESS, LLC

COUNSELOR DEVELOPMENT PROGRAM

LPC Associate Supervision Manual

Clinical supervision requirements, legal and ethical expectations, risk management, and practice accountability

PROGRAM PHILOSOPHY

It is not just supervision. It is career development. This manual combines the formal supervision process with the developmental framework used throughout the LifeWise Counselor Development Program.

Clinical Director and Supervisor

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How to Use This Manual

Use this manual together with the LifeWise Counselor Development Program Supervisee Development Guide, the Supervisor Program Guide, the current Texas Behavioral Health Executive Council supervisory agreement, applicable contracts, practice policies, informed consent documents, payer or platform requirements, and current law. The Development Guide contains the program curriculum and supervisee working tools; this Manual is the primary LifeWise reference for formal LPC Associate supervision requirements and accountability.

IMPORTANT COMPLIANCE LIMIT

This manual is a supervision and program resource. It does not replace Texas law or Board rules, the current BHEC supervisory agreement form, contracts, site policies, informed consent requirements, payer requirements, or individualized legal advice. If a requirement in this manual becomes outdated or conflicts with controlling law or Board rules, the controlling requirement governs.

Governing Standards and Order of Authority

1. Federal and Texas law, including HIPAA where applicable, Texas confidentiality requirements, mandated reporting duties, and other controlling legal requirements.
2. Texas Behavioral Health Executive Council and Texas State Board of Examiners of Professional Counselors statutes, rules, and required forms.
3. Applicable payer, credentialing, EHR, telehealth, and practice site requirements.
4. ACA ethical standards and other applicable professional ethical standards.
5. LifeWise policies, supervision agreements, program expectations, and procedures.

1. Purpose and Scope of Supervision

Supervision is a structured, collaborative, evaluative, educational, and gatekeeping relationship. Its primary purposes are to protect client welfare, support lawful and ethical practice, strengthen clinical judgment, improve documentation and risk management, and help the LPC Associate develop toward competent independent professional practice.

Supervision is not psychotherapy. Personal reactions, values, bias, countertransference, stress, or impairment may be discussed when they affect clinical work, professional boundaries, ethical decision making, or safe practice.

BOTTOM LINE

Supervision is not simply case reporting. The Associate is expected to make clinical thinking visible, bring uncertainty forward early, apply feedback, and demonstrate increasing competence over time.

2. Required Texas Supervision Structure

- Supervision may begin only after the required Texas supervisory agreement and related LifeWise documents have been completed as required.
- The Associate must hold an active Texas LPC Associate license before counseling hours are earned toward supervised experience.
- The Associate may provide counseling only as part of supervised practice and may not represent themselves as independently licensed.
- The Associate must receive at least four hours of direct supervision each month while engaged in counseling unless an extended leave of one month or more is approved in writing as allowed by current rules.
- Supervision may occur individually or in group format as permitted by rule. No more than 50 percent of total supervision hours may be received through group supervision.
- Full LPC licensure requires at least 3,000 supervised experience hours, including at least 1,500 direct client counseling contact hours, completed over no fewer than 18 months.
- The Associate remains under Board approved supervision until the full LPC license is issued, even if the required hours have already been completed.

DO NOT ASSUME AN HOUR COUNTS

The Associate is responsible for maintaining accurate licensure records. When uncertain whether an activity, supervision arrangement, leave period, or client contact qualifies toward licensure, ask before relying on it.

3. Supervision Format and Frequency

Format	LifeWise Practice
Individual supervision	Focused case review, clinical skill development, ethical consultation, documentation review, feedback, and attention to the Associate’s developmental needs.
Group supervision	Shared learning, peer perspectives, professional communication, accountability, and case consultation when consistent with applicable rules and confidentiality requirements.
In person supervision	May occur in a professional and confidential setting when available and appropriate.
Secure video supervision	May occur through an approved secure platform. The Associate is responsible for privacy and preventing unauthorized people from hearing or viewing client information.

Format	LifeWise Practice
Meeting frequency	LifeWise generally schedules supervision frequently enough to support continuity, accountability, and developmental needs while meeting current Texas requirements.

Limitations to Consider

- Individual supervision provides focused attention but may reduce exposure to peer feedback.
- Group supervision provides shared learning but may limit the amount of time available for each Associate's cases.
- Scheduling, client risk, documentation quality, privacy, site requirements, and developmental needs may require a different supervision format or increased supervision.

4. Role Induction and Supervisory Relationship

Role induction clarifies the purpose, structure, expectations, responsibilities, and boundaries of the supervisory relationship at the beginning of supervision. The goal is a clear, respectful, clinically useful, and accountable working relationship.

Supervisor Role

The supervisor functions as teacher, consultant, evaluator, gatekeeper, collaborator, and professional mentor. Supervision is designed to support competent, ethical, and legally sound counseling practice.

Supervisor Responsibility	Practice Application
Clinical guidance	Support case conceptualization, treatment planning, assessment, diagnosis when applicable, intervention selection, crisis response, termination, referrals, and therapeutic use of self.
Clinical oversight	Review case material, documentation, treatment plans, progress notes, risk concerns, and client welfare issues as appropriate.
Ethical and legal guidance	Help identify ethical issues, apply professional standards, protect confidentiality, understand boundaries, and seek consultation when needed.
Evaluation and gatekeeping	Provide ongoing feedback about competence, judgment, professionalism, documentation, use of supervision, and readiness for increased independence.

Supervisor Responsibility	Practice Application
Administrative oversight	Maintain required supervision records and monitor compliance with applicable supervision expectations.
Learning environment	Provide a respectful and accountable supervision space where questions, mistakes, uncertainty, and feedback can be addressed early.

LPC Associate Role

Associate Responsibility	Practice Application
Active participation	Arrive prepared with current hour records, case material, questions, documentation concerns, and follow up from prior supervision.
Receptiveness to feedback	Listen, ask clarifying questions, reflect, make corrections, and demonstrate follow through.
Self reflection	Examine clinical reactions, values, bias, countertransference, professional identity, strengths, limitations, and growth areas.
Case presentation	Present sufficient and accurate clinical information while protecting confidentiality and client welfare.
Ethical compliance	Know and follow applicable laws, Board rules, ethical standards, supervision expectations, and LifeWise policies.
Communication	Notify the supervisor promptly about risk, complaints, subpoenas, site or license changes, documentation concerns, ethical questions, and other matters that may affect supervised practice.
Professional growth	Seek training, consultation, and skill development needed for safe and competent practice.

5. Developmental Program Reference

The LifeWise Counselor Development Program Supervisee Development Guide contains the developmental framework and working tools used throughout supervision, including supervision preparation, case consultation, clinical reasoning, professional identity development, individualized advanced clinical interests, developmental stages, self assessment, and career development. This manual does not repeat that curriculum. The Associate is expected to use both documents together.

DEVELOPMENT GUIDE

Use the Supervisee Development Guide for learning goals, developmental stages, supervision preparation, case consultation tools, self assessment, and professional or career development. Use this Manual for formal LPC Associate supervision requirements, compliance expectations, risk procedures, records, and accountability.

6. Assessment, Feedback, Evaluation, and Remediation

Initial Assessment

- Review previous clinical experience, current practice setting, populations served, and developmental goals.
- Review case conceptualization and clinical reasoning through a sample case or comparable method.
- Discuss learning style, strengths, growth areas, documentation confidence, and ethical concerns.
- Clarify expectations for supervision preparation, hour tracking, risk consultation, communication, and documentation.

Ongoing Assessment

- Review case material, treatment planning, documentation, risk assessment, and clinical judgment over time.
- Observe patterns in ethical awareness, boundaries, communication, reliability, and follow through.
- Provide regular feedback that identifies both strengths and growth areas.
- Use formal evaluation, increased supervision, remediation, case restriction, or other corrective action when clinically or ethically indicated.

Potential Growth Area	Supervision Response
Countertransference	Use reflection, consultation, case review, and boundary discussion to identify and manage clinical impact.
Ethical dilemma	Review applicable standards, rules, consultation options, client welfare, and documentation needs.
Burnout or impairment concern	Discuss workload, boundaries, safe practice, consultation, and appropriate professional support.
Documentation problem	Clarify the expected standard, review examples, require correction, and monitor improvement.
Risk management concern	Increase supervision around suicide or violence risk, abuse, neglect, crisis response, mandated reporting, and emergency procedures.
Scope or competence concern	Increase consultation, require training, restrict use of an intervention, reassign a case, or refer when needed for client welfare.

Remediation

A remediation plan is a structured process used to identify a concern, define the expected standard, increase support or oversight, and measure improvement. Depending on the seriousness of the concern, remediation may include additional training, more frequent supervision, documentation review, caseload limits, case reassignment, or temporary restriction of clinical activity.

> **NO SURPRISE EVALUATIONS**
> Except when immediate safety, legal, or ethical action is required, LifeWise aims to address significant concerns when they are identified so the Associate has a fair opportunity to understand the issue and respond.

7. Required Supervision Records

- Signed and dated Texas supervisory agreement for each approved supervisor as required.
- Verification of the Associate's current license status and applicable issuance or expiration information.
- Date, duration, and type of each supervisory session.
- Summary of topics reviewed, cases discussed, ethical or risk issues, clinical recommendations, and follow up tasks.
- Accurate records of direct hours, indirect hours, supervision hours, site hours, and approved leave periods.
- Records of concerns discussed with the Associate, including remediation plans when used.
- Documentation of extended leave or interruption in supervision when applicable.
- Final supervised experience or termination documentation required when supervision ends or required hours are completed.

The supervisor maintains required supervision records. The Associate must maintain their own accurate licensure and experience records and provide them for review as requested.

8. Administrative and Documentation Expectations

Administrative competence is part of professional counseling practice. Supervision includes attention to documentation, client communication, informed consent, scheduling, billing awareness, records, privacy, emergency procedures, and compliance expectations.

- Maintain accurate and timely client records, including intake information, treatment plans, progress notes, risk concerns, termination or transfer documentation, and billing information when applicable.
- Follow LifeWise and site procedures for scheduling, cancellations, client communication, payment processes, emergency care, and record storage.
- Use only approved secure methods for communications involving client information.
- Keep supervision and experience hour records current.

- Notify the supervisor promptly of client risk, complaints, subpoenas, legal requests, site changes, license concerns, ethical questions, or other significant issues.
- Stay informed about current forms, rules, requirements, and practice procedures related to supervised LPC Associate practice.

DOCUMENTATION QUALITY IS A COMPETENCY

Documentation is not an administrative afterthought. Accuracy, timeliness, clinical reasoning, risk documentation, and follow through are part of the Associate's competency evaluation.

9. HIPAA, Confidentiality, and Client Records

Confidentiality includes how client information is spoken about, viewed, stored, transmitted, accessed, and disposed of. Supervision must protect client confidentiality and comply with applicable privacy law, ethical standards, and LifeWise procedures.

Minimum Necessary

- Use de-identified case information when full identifiers are not needed.
- Share identifying information only when necessary for clinical oversight, risk management, consultation, legal compliance, billing, or continuity of care.
- Access only records needed for assigned clinical responsibilities.
- Do not place protected client information into personal notes, unapproved cloud storage, personal email, consumer messaging apps, or unapproved AI tools.
- Use only approved systems and secure devices for protected client information.
- Report suspected privacy or security incidents promptly through the approved LifeWise process.

Client Record Responsibility

Client record ownership, retention, access, maintenance, and destruction are governed by the entity that employs or contracts with the Associate, or by the Associate when self employed, consistent with current rules and applicable law. Records may be reviewed in supervision when legally permissible and clinically appropriate.

10. Emergency and High Risk Consultation

SUPERVISION IS NOT AN EMERGENCY RESPONSE SYSTEM

When immediate action is required to protect a client or another person, follow the appropriate emergency or mandated reporting procedure first. Do not delay necessary safety action while waiting for the supervisor to respond.

The Associate must seek prompt consultation when client welfare, safety, legal duties, ethical responsibilities, or significant professional risk are involved. Examples include:

- Suicidal ideation, self injurious behavior, recent attempts, significant escalation in risk, or inability to maintain safety.
- Homicidal ideation, credible threats, serious and foreseeable danger, weapons concerns, or violence risk.
- Suspected abuse, neglect, exploitation, or another situation that may create a reporting obligation.
- Psychosis, mania, severe intoxication, withdrawal, impaired judgment, hospitalization, welfare checks, or crisis team involvement.
- A high risk client becoming unexpectedly unreachable.
- Subpoenas, court orders, attorney requests, records requests, grievances, Board complaints, or legal threats.
- Significant boundary concerns, dual relationships, sexual or romantic issues, or countertransference affecting care.
- Privacy or security incidents involving client information.
- Any situation where the Associate is unsure whether a legal, ethical, clinical, or practice duty applies.

Urgent Consultation Process

1. Address immediate safety needs first.
2. Use the designated urgent consultation method and clearly identify the matter as urgent.
3. Provide concise facts, including current client status, risk indicators, protective factors, actions already taken, and the decision requiring consultation.
4. Follow emergency, mandated reporting, organizational, and legal procedures as required.
5. Document the assessment, consultation, clinical reasoning, actions, referrals, and follow up plan in the clinical record as appropriate.
6. Review the event in supervision and identify learning, follow up, or needed changes.

11. Professional Boundaries, Conflicts, and Impairment

- The supervisor and Associate must avoid relationships, conflicts of interest, financial arrangements, or personal dynamics that impair objective professional judgment.
- The supervisory relationship must remain consistent with current Texas restrictions concerning prohibited relationships and conflicts.
- The Associate should bring significant countertransference, boundary pressure, rescue impulses, avoidance, anger, fear, or other reactions affecting care into supervision early.
- The Associate must communicate when illness, mental health concerns, substance use, burnout, sleep deprivation, grief, stress, or another impairment issue is materially affecting safe practice.
- Client welfare takes priority over the Associate’s desire to retain a case or demonstrate independence.

12. Professional Identification, Marketing, and Billing

Clients and the public must be able to understand the Associate's actual professional status and the role supervision plays. Professional representation must be accurate everywhere it appears.

- Identify yourself accurately as a Licensed Professional Counselor Associate or LPC Associate as required by current Texas rules.
- Include the Board approved supervisor's name or a statement of supervision as required on practice related forms, marketing, websites, informed consent materials, billing documents, or other documents where the Associate's name appears.
- Do not advertise, bill, or communicate in a way that implies independent practice or credentials beyond the Associate's legal status.
- Billing documents must accurately reflect licensure status and supervised practice role.
- Do not claim a specialty, certification, training level, or competence that is not supported.

13. Records, Interruption, and Termination of Supervision

Supervisor Interruption or Incapacity

If the supervisor becomes unavailable because of illness, emergency, extended absence, death, license expiration, license discipline, or another interruption, the Associate will be notified as soon as reasonably possible and assisted with alternate supervision when required. The Associate must not continue practicing in a manner that violates current supervision requirements.

When Supervision Ends

- Complete required supervised experience, verification, or termination documentation within the required timeframe.
- Complete outstanding client documentation and supervision records.
- Review active clients and create an appropriate continuity plan consistent with client choice, clinical needs, payer requirements, supervision status, and applicable law.
- Complete required notice, transfer, referral, or termination steps.
- Resolve access to LifeWise systems, records, scheduling, email, files, and other practice resources.
- Update professional profiles and remove LifeWise branding when required by the applicable agreement.

> **CLIENTS ARE NOT PROPERTY**
> Transition planning must prioritize informed client choice, continuity of care, clinical appropriateness, supervision status, insurance or platform requirements, and applicable law.

14. Key Supervision Documents

Document	Purpose
BHEC Supervisory Agreement	Establishes the Board recognized supervisory relationship as required.
LifeWise Supervision Agreement or Contract	Defines LifeWise responsibilities, fees or compensation when applicable, communication, practice expectations, and termination terms.
Supervisor Disclosure Statement	Explains supervisor qualifications, approach, expectations, confidentiality limits, documentation, and the nature of supervision.
Client Informed Consent and Associate Disclosure	Explains the Associate's licensure status, supervision arrangement, confidentiality limits, and client rights.
Experience and Supervision Hour Records	Track direct, indirect, and supervision hours and progress toward licensure requirements.
Clinical Documentation Templates	Support consistent intake, treatment planning, progress notes, risk documentation, and continuity of care.
Client Record Compliance Review	Provides a structured way to review records and identify corrective action when needed.
Evaluation or Remediation Form	Documents strengths, concerns, professional growth, corrective steps, and follow up.

15. Supervision Commitment

The supervision relationship works best when both parties participate honestly, consistently, and professionally. The Associate is encouraged to bring questions, uncertainty, concerns, mistakes, and clinical discomfort into supervision early. The supervisor will respond with structure, support, feedback, accountability, and appropriate gatekeeping.

SUPERVISION COMMITMENT

The purpose of supervision is to protect clients, strengthen clinical judgment, support ethical decision making, improve professional accountability, and help the LPC Associate develop into a competent and responsible professional counselor.

Acknowledgment

By completing this acknowledgment, the supervisor and LPC Associate confirm that they have reviewed this manual, understand the supervision expectations, and agree to follow current Texas LPC Board rules, applicable law, ethical standards, the controlling supervisory agreement, and LifeWise Counseling and Wellness, LLC policies. The parties understand that current law and Board rules control if any provision in this manual becomes outdated or inconsistent with legal requirements.

Field	Type or Sign Here
LPC Associate Name	
Date	
LPC Associate Signature	
Supervisor Name	Stacy Hixon, MA, LPC-S, CCTP, FRTP
Date	
Supervisor Signature	

Source Documents Used for This Manual

- LifeWise Process of Supervision, Texas LPC Associate Supervision Agreement Addendum.
- LifeWise LPC Associate Supervision Guide.
- LifeWise Counselor Development Program Supervisor Program Guide.
- LifeWise Counselor Development Program Supervisee Development Guide.

This manual should be reviewed periodically against current Texas BHEC rules and LifeWise policy.

