Professional Boundaries Guide

Fictional requests: a person asks for your personal number, offers an expensive gift and asks you to lend money. They are seeking reassurance and help.

Write a warm response using the authorised work contact.

Your response: _____

What should you check about gifts?

Your response: _____

How will you decline a loan and arrange appropriate support?

Your response: _____

Which concerns should be reported and through what role?

Your response: _____

Why does a family relationship not automatically permit sharing records?

Your response: _____

Learning guidance

Be kind and explain the appropriate route. Follow gifts and financial policies rather than assuming acceptance is harmless. Maintain confidentiality and professional accountability.

This is a learning worksheet, not workplace competency sign-off.