



THE PEARL PSYCHEDELIC INSTITUTE

**CONTINUING EDUCATION, TRAINING, & WORKSHOP
PARTICIPANT HANDBOOK**

www.pearlpsychedelicinstitute.org



Welcome to The Pearl Psychedelic Institute, and we look forward to working with you. The following is information related to continuing education programs, trainings, and workshops of The Pearl Psychedelic Institute. Please read this information thoroughly as it directly relates to the programs for which you are registering. If you have any questions, please discuss with The Pearl Training Coordinator.

Mission Statement

The Pearl Psychedelic Institute is a nonprofit that aims to bring psychedelic-assisted psychotherapy into mainstream practice through research, treatment, and training while reducing the barriers to patient access.

Registration Policies

Tuition listed include administrative costs and educational materials. The Pearl has a pay-up-front policy for all programs. The only exceptions will be for pre-approved programs where an individual payment plan is appropriate. Registrations that are received without accompanying payment will not be processed and participants who have not paid the course fee will not be admitted into the program.

Unless otherwise noted in course materials, the following cancellation policy applies to all programs:

- Cancellations must be in writing (via email or mail)
- Cancellations received more than 2 weeks prior to the event will receive 100% refund
- Cancellations received between two weeks and two full business days prior to the first day of the event are refunded at 70% of the registration fee subject to a minimum \$25 cancellation fee
- No refunds or credits will be given for cancellations received less than two full business days prior to the event
- Refund exceptions due to medical or family emergencies will be handled on a case by case basis.
- Partial credits for Continuing Education hours are not offered.

The Pearl assumes permission to use audio, video and still images from all programs for promotional and educational purposes. Please contact us prior to registering if you have any concerns.

If you require learning or accessibility accommodations during the training, please contact the Marketing & Communications Director.

If you have any questions, please contact The Pearl Marketing & Communications Director, Kim Turpin, at kturpin@pearlpsychedelicinstitute.org.



Ethics

The Pearl Psychedelic Institute adheres to the Code of Ethics of the Multidisciplinary Association of Psychedelic Studies (MAPS) as outlined below:

1. Safety

- We commit to the safety of our study participants, patients, and clients.
- We ensure that a person is an eligible candidate for treatment before enrolling them, both medically and psychologically. An eligible candidate has the resources necessary to engage in treatment, ideally including supportive people in their life and a stable and safe living environment.
- We conduct thorough and comprehensive preliminary screening and preparation.
- Prior to initiating treatment, we provide participants with clear information about our availability, backup support, and emergency contacts.
- We take measures to prevent physical and psychological harm. We ask participants not to leave during medicine sessions. We inform participants that we will take precautions to ensure their safety, such as preventing falls or injuries.
- We immediately address medical emergencies.
- We have a crisis plan prepared, where a qualified professional is available in the event of participant crisis or medical complications. We maintain responsibility for addressing crises as long as the participant is under our professional care.
- We provide thorough post-session integration with participants.
- We never abandon a participant. We conduct appropriate termination, with preparation when possible, and provide referrals to other providers.
- We adhere to laws and guidelines regarding storage and security of psychedelic medicines.

2. Confidentiality and Privacy

- We commit to the privacy of our participants and uphold professional standards of confidentiality.
- We adhere to applicable patient privacy laws and regulations, such as the HIPAA Act, and other local, State, and Federal statutes.
- We discuss the limitations of confidentiality with our participants during the informed consent process and before initiating treatment. Depending on the licensing agency and the law, exceptions to confidentiality may include mandated reporting if there is reason to believe that a child, elderly person, or dependent adult is being abused or has been abused, if there is a serious threat to harm an identifiable victim, including oneself or another, and when required by a court order. Under these conditions, we release the minimum amount of participant information required.
- We may occasionally discuss cases as part of professional consultation and supervision, in which our consultants and supervisors are also obligated to respect



participant privacy, and we will provide the minimum amount of identifying information.

- Outside of these limitations in confidentiality, we never release personal information about participants without their explicit permission.
- We make agreements with our participants about acceptable and preferred means of communication, such as leaving voicemails, sending text messages, hours of contact, and response time.
- We securely store treatment records and session recordings. We promptly respond to breaches in confidentiality.
- We seek legal counsel as needed to maintain participant confidentiality.

3. Transparency

- We respect participants' autonomy and informed choice.
- We include our participants in treatment decisions.
- We obtain informed consent before conducting treatment and when introducing a new intervention or technique. We honor the participant's option to withhold or withdraw consent at any time.
- We inform participants of all treatment procedures, including an accurate description of medicines used, potential risks and benefits, as well as alternative treatment options.
- We discuss the process of termination with our participants at intake.
- We inform participants if we have significant reason to believe they may not be benefitting from treatment.
- We accurately represent our background and training using appropriate terms according to applicable laws and professional code.
- In advance of treatment, we inform participants of any fees and the process for collecting payment.
- We obtain consent to record sessions when applicable and to use recordings solely for purposes explicitly agreed upon by the participant, such as for training and supervision, or for the participant's personal use.
- We obtain informed consent for any physical touch by describing the type of therapeutic touch. Physical touch is never sexual and we make agreements about how the participant can stop touch at any time.
- We inform participants in advance about the possible or scheduled presence of assistants, providers, observers, or any other staff who may be a part of treatment and/or have access to patient-identifying information.
- We provide consistent care to our participants and arrange backup and emergency contact when we are unavailable to participants.

4. Therapeutic Alliance and Trust

- We act in accordance with the trust placed in us by participants.
- We aspire to create and maintain therapeutic alliances built on trust, safety, and clear agreements, so that participants can engage in inner explorations.



- We respect the inner healing intelligence of our participants to guide their experience.
- We understand that the healing process is deeply personal; each participant has different needs for support.
- We set our participants' best interest above our own interests, within the bounds of our therapeutic relationship.
- We treat people receiving services or reaching out for services with respect and compassion.
- We acknowledge the inherent power differential between therapy providers and participants and act conscientiously in the service of participants' self-empowerment.
- We avoid entering into dual relationships that are likely to lead to impaired professional judgment or exploitation. In cases where there is a dual relationship, we give special attention to issues of confidentiality, trust, communication, and boundaries, and seek supervision as needed.
- We use careful judgment about any continuing interaction with existing or previous participants outside of treatment.
- When treating couples or families, we always consider potential conflicts of interest, disclose policies on communicating information between family members, and discuss continued care and treatment plan. When working with participants in a research study, we strive to deliver therapeutic benefit while following scientific protocol.

5. Use of Touch

- When using touch as part of our practice, we commit to obtaining consent and offering touch only for therapeutic purposes.
- We only offer techniques, such as touch, if they fall within our scope of practice and competence.
- When touch is part of our practice, we discuss consent for touch during intake, detailing the purpose of therapeutic touch, how and when touch might be used and where on the body, the potential risks and benefits of therapeutic touch, and that there will be no sexual touch.
- We obtain consent for touch prior to the participant ingesting medicine, as well as in the therapeutic moment. Aside from protecting a person's body from imminent harm, such as catching them from falling, the use of touch is always optional, according to the consent of the participant.
- We discuss in advance simple and specific words and gestures the participant is willing to use to communicate about touch during therapy sessions. For example, participants may use the word "stop," or a hand gesture indicating stop, and touch will stop.
- We practice discernment with touch, using clinical judgment and assessing our own motivation when considering if touching a participant is appropriate.



6. Sexual Boundaries

- We do not initiate, respond to, or allow any sexual touch with participants.
- While we respect the sexual identities and expression of our participants, and validate participants' processes that might relate to sexuality and sexual healing, we firmly maintain the responsibility as providers of upholding clear professional boundaries.
- We do not engage in sexual intercourse, sexual contact, or sexual intimacy with a participant, or a participant's spouse or partner, or immediate family member, during the therapeutic relationship or after termination.
- We commit to examining our own sexual countertransference, to not act in ways that create ambiguity or confusion about sexual boundaries, and to seek supervision as needed.
- As representatives of this work, we aim to uphold clear sexual boundaries and ethics in our daily lives.

7. Diversity

- We respect the value of diversity, as it is expressed in the various identities and experiences of our participants.
- We do not condone or knowingly engage in discrimination. We do not refuse professional service to anyone on the basis of race, gender, gender identity, gender expression, religion, national origin, age, sexual orientation, or socioeconomic status.
- We take steps to examine unconscious biases that we may hold and commit to ongoing self-reflection to unlearn oppressive patterns.
- We make every effort to include people living with physical, mental, and cognitive disabilities.
- We respect the unique experiences of our participants, and practice openness towards different peoples' values, belief systems, and ways of healing.
- We are attentive to the impact of power dynamics in our relationships with participants, particularly where there are differences in privilege, gender, race, age, culture, education, and/or socioeconomic status.
- We strive to be honest with ourselves and with our participants about the limits of our understanding, and to hold genuine curiosity and interest as we relate to our participants' experiences.
- We aim to provide culturally-informed care, and seek education in support of greater cultural understanding. We refer participants to other providers as appropriate.

8. Special Considerations for Non-Ordinary States of Consciousness

- We tend to special considerations when working therapeutically with participants in non-ordinary states of consciousness.



- Participants in non-ordinary states of consciousness may be especially open to suggestion, manipulation, and exploitation; therefore, we acknowledge the need for increased attention to safety and issues of consent.
- We examine our own actions and do not engage in coercive behavior.
- In working with non-ordinary states that can evoke unconscious material for both the participant and therapy provider, we acknowledge the potential for stronger, more subtle, and more complicated transference and countertransference, and, with that in mind, we practice self-awareness and self-examination, and seek supervision as needed.
- We respect the spiritual autonomy of our participants. We practice vigilance in not letting our own attitudes or beliefs discount or pathologize our participants' unique experiences. We hold and cultivate an expanded paradigm, which includes the experiences people have in extraordinary states.
- We protect our participants' health and safety through careful preparation and orientation to the therapy, as well as thorough integration.
- We support participants who may experience crisis or spiritual emergency related to psychedelic experiences with appropriate medical and psychological care, engaging the support of outside resources as needed.

9. Finances

- We maintain clear communication with participants about fees and aspire to increase financial access to services.
- We disclose our fees and payment procedures before enrolling a participant in treatment.
- We advocate for our participants with third party payers, including health insurance reimbursement, sponsors, and donors when appropriate.
- We create opportunities for participants who are unable to afford the full cost up-front to engage in treatment, by considering income-based fees, sliding scale, pro-bono work, scholarship, sponsorship, and donor-supported services.
- We do not take on or continue treating a participant solely for financial gain; we only take on or continue to treat a participant if we believe our services will have therapeutic value.
- We do not accept payment or charge money for referrals.
- We establish and maintain clear and honest business practices.

10. Competence

- We agree to practice within our scope of competence, training, and experience specific to the populations we are working with and the modalities we offer.
- We agree to represent our work honestly and accurately.
- We assess at intake whether a potential participant's needs can be addressed within our scope of competence and, if not, make informed referrals to other providers and services.



- We commit to ongoing professional development, seeking supervision and continuing education to further our therapeutic skills and presence.
- We agree to maintaining our licensure and certification in good standing, including re-certification as required.

11. Relationship to Colleagues and the Profession

- We establish and maintain compassionate and positive working relationships with colleagues, in a spirit of mutual respect and collaboration.
- To maintain the highest integrity in our practice, we agree to seek counsel with our fellow practitioners and colleagues, being open to feedback when given, and offering feedback when it may be needed.
- As practitioners of this modality, we are mindful of how we represent this work to the public, including through the media, social media, and public presentations.

12. Relationship to Self

- We commit to ongoing personal and professional self-reflection regarding ethics and integrity.
- We adhere to an ongoing practice of self-compassion and self-inquiry.
- We agree to seek professional assistance and community support for our own emotional challenges or personal conflicts, especially when, in our view or in the view of colleagues, they affect our capacity to provide ethical care to participants.
- We subscribe to the value of humility, out of respect for the transformative power of the experiences we have the privilege to witness and support, and out of respect for human dignity.

The Pearl Psychedelic Institute does not discriminate against any individual or group with respect to any service, program, or activity on the basis of gender, race, creed, national origin, sexual orientation, religion, age, organizational membership, disability, or any other basis prohibited by law.



Participant Bill of Rights

The Pearl Psychedelic Institute adheres to the Patient Bill of Rights of the Multidisciplinary Association of Psychedelic Studies (MAPS) as outlined below:

MAPS Patient Bill of Rights, Version 1: 10 February 2022

The MAPS Patient Bill of Rights for Psychedelic Therapy provides patients with information on how they can expect to be treated while participating in MDMA-assisted therapy with a MAPS-certified practitioner. MAPS and MAPS Public Benefit Corporation, believe that effective treatment is achieved through an alliance of trust between the patient and the practitioner. We provide this Bill of Rights to help patients understand their rights and their practitioners' responsibilities.

If you have questions about your rights, you may contact MAPS Public Benefit Corporation at compliance@maps.org or 844-627-7722. If you have an ethical grievance to report, please see the section below, titled Right to be heard and seek redress of Complaints.

Patient Rights

Right to respectful and compassionate care

You have the right to respectful and compassionate care based on trust and safety. You have the right to treatment in a safe and ethical setting, free from sexual, physical, emotional, and financial abuse, mistreatment, harassment, or exploitation.

Right to information

You have the right to have information presented to you clearly in a manner that you can understand. You have the right to receive information regarding your diagnoses and treatment. You have the right to receive information about the potential effects, risks, and benefits of psychedelic-assisted therapy. You have the right to receive information about all procedures and interventions that may be used during treatment. You have the right to be informed of your practitioners' availability and methods of communication. You have the right to receive information about alternative treatment options, including no treatment at all.

Right to informed consent

You have the right to grant, withhold, or withdraw consent to treatment at any time. You have the right to grant, withhold, or withdraw consent to the use of touch at any time. You have the right to refuse participation in research, fundraising, or educational activities at any time. If you withdraw consent to treatment during a psychedelic-assisted therapy session, you will be asked to remain at the treatment site until the medical staff determine it is safe for you to leave.



Right to ask questions

You have the right to ask any questions you may have before and during the course of treatment, and to receive satisfactory answers before commencing or continuing treatment.

Right to non-discrimination

You have the right to receive treatment free from discrimination on the basis of your race, gender, gender identity, gender expression, appearance, physical abilities, religion, culture, age, sexual orientation, or socioeconomic status.

Right to privacy and confidentiality

You have the right to privacy and confidentiality. This includes the privacy and security of therapy sessions, communications, and records. You have the right to be informed about the limitations of confidentiality. You have the right to know if there are supervisors, consultants, students, or others with whom your therapy practitioners will discuss your case.

Right to reasonable continuity of care

You have the right to reasonable continuity of care. If your practitioner is no longer able to provide care, you have the right to receive referrals to other practitioners or services. If you need ongoing care or other services that your practitioner is not able to provide, you have the right to receive referrals to other practitioners and services.

Right to transparency in fees

You have the right to be informed in advance of any fees and payment procedures, and to have all financial transactions maintained transparently.

Right to obtain a copy of the MAPS Code of Ethics for Psychedelic Psychotherapy

You have the right to obtain a copy of the MAPS Code of Ethics and to know that your practitioner has agreed to its principles.

Right to be heard and seek redress of complaints

You have the right to express complaints or concerns to your treatment practitioners. If you are comfortable doing so, you are encouraged to bring complaints or concerns about your treatment directly to the office where you receive your care. If you are dissatisfied with the response you receive, you have a right to express complaints or concerns to the practitioner's licensing board and, if related to participation in a clinical trial, to the Independent Review Board (IRB) listed in the protocol and consent forms for the study which have been provided to you.

If you are receiving treatment from a MAPS-trained practitioner, you have the right to report violations of the MAPS Code of Ethics. You are encouraged to report ethical grievances or complaints related to participation in a clinical research study to the Independent Review Board (IRB) listed in the protocol and consent forms for the study. Ethical grievances not related to an active clinical research study may be reported to the MAPS Compliance Team at compliance@maps.org or (844) MAP-SPBC (844-627-7722). All reported complaints and concerns will be thoroughly heard and reviewed, and



appropriate corrective and disciplinary actions will be evaluated. Additionally, patients may choose to file a complaint to the practitioner's licensing board when applicable.

Right to a designated advocate

You have the right to formulate an "advance directive" to explain how you would like healthcare decisions to be made if you cannot make the decisions yourself. You have the right to appoint a designated advocate of your choice to make health care decisions on your behalf.

Right to emergency care

You have the right to be informed in advance of your practitioners' procedures in the event of a medical or psychological emergency. Your safety is the greatest priority throughout the course of treatment. You have the right to ask about your practitioner's procedures for ensuring your safety and responding in the case of an emergency.

Right to be informed about the people who will be providing treatment

You have the right to be informed about the people who will be providing treatment, including their licensure, qualifications, and training.

Right to participate in your treatment plan

You have the right to be informed about and participate in decisions regarding your treatment plan whenever possible.



Conflict of Interest Statements

The Pearl is committed to the identification and resolution of potential conflicts of interest in the planning, promotion, delivery, and evaluation of continuing education, trainings, & workshops. Potential conflicts of interest occur when an individual assumes a professional role in the planning, promotion, delivery, or evaluation of continuing education, trainings, & workshops where personal, professional, legal, financial, or other interests could reasonably be expected to impair their objectivity, competence, or effectiveness.

Potential Conflicts of Interest in the Planning

The Pearl Training Director is responsible to identify, declare, and resolve any potential conflict of interest The Pearl may have in offering any specific program of continuing education, trainings, & workshops. In the event of a potential conflict of interest, The Pearl Training Director will assume responsibility to resolve the potential conflict. The Pearl requires that professionals participating in the planning of continuing education, trainings, & workshops identify any potential conflict of interest they may have in the review, selection, development, delivery, or evaluation of that program and disclose the conflict or recuse themselves from any decision-making concerning that program. In the event of a potential conflict of interest, The Pearl Training Director will ensure that the individual recuses themselves from the planning process.

Potential Conflicts of Interest in the Promotion

When preparing promotional material for continuing education, trainings, & workshops, The Pearl includes information concerning any financial support, including in-kind support, provided by another party. The Pearl also informs potential participants of any potential conflicts of interest with an instructor. If there is no financial support or any potential conflict of interest or commercial support, The Pearl will ensure that is clearly stated in the promotional material. If information about financial support or any potential conflict of interest is not included in the promotional material prepared for continuing education, trainings, & workshops, The Pearl will clearly indicate how a potential participant can secure that information.

Potential Conflicts of Interest in the Delivery

The Pearl requires that there is a process to clearly describe any financial support for a continuing education, trainings, & workshops at the time the continuing education, trainings, or workshops begins. Any other relationship that could be reasonably construed as a conflict of interest will also be disclosed. If there is no financial support or potential conflict of interest, The Pearl will ensure there is a process (e.g., a designated individual or a slide at the start of the presentation, documentation in materials) to clearly state any potential conflicts at the time the continuing education, trainings, or workshops begin.



Participant Grievance Procedure

The Pearl Psychedelic Institute (The Pearl) is fully committed to conducting all activities with the highest level of integrity and ethics. The Pearl will comply with all legal and ethical responsibilities to be non-discriminatory in promotional activities, program content and in the treatment of program participants. The monitoring and assessment of compliance with these standards will be the responsibility of The Pearl Training Director in consultation with The Pearl Chief Operating Officer (COO). If The Pearl Training Director is involved as a presenter in the program, The Pearl COO will be primarily responsible for handling the grievance.

While The Pearl goes to great lengths to assure fair treatment for all participants and attempts to anticipate problems, there will be occasional issues which come to the attention of the training presenters which require intervention and/or action on the part of an officer of The Pearl. This procedural description serves as a guideline for handling such grievances.

When a participant, either orally or in written format, files a grievance and expects action on the complaint, the following actions will be taken.

1. If the grievance concerns a speaker, the content presented by the speaker, or the style of presentation, the individual filing the grievance will be asked to put their comments in written format. The Training Director or COO will then pass on the comments to the speaker, assuring the confidentiality of the grieved individual.
2. If the grievance concerns a workshop offering, its content, level of presentation, or the facilities in which the workshop was offered, the Training Director or COO will mediate and will be the final arbitrator. If the participant requests action, the Training Director or COO will:
 - a. attempt to move the participant to another workshop or
 - b. provide a credit for a subsequent year's workshop or
 - c. provide a partial or full refund of the workshop fee.

Actions 2b and 2c will require a written note, documenting the grievance, for record keeping purposes. The note need not be signed by the grieved individual.

3. If the grievance concerns The Pearl CE program, in a specific regard, The Pearl Board of Directors will attempt to arbitrate.
4. If the grievance involves a CE Program offered through an authorizing agency (i.e., The National Board of Certified Counselors (NBCC), The Pearl will report to authorizing agency each complaint, dispute, or other grievance (complaint matter) that directly or indirectly relates to any terms and requirements of its governing policy, including all complaint matters received from a program participant, another organization, or a government agency or authority. Such complaint matters will be reported to the



authorizing agency within sixty (60) days of The Pearl's knowledge of the complaint, including all related written communications and materials.

Pearl Training Director: Kim Skelton, kskelton@pearlpsychedelicinstitute.org

Pearl Chief Operating Officer (COO): Bill Zimmer; bzimmer@pearlpsychedelicinstitute.org



Participant Registration, Attendance, & Privacy

The Pearl Psychedelic Institute (The Pearl) is fully committed to protecting the privacy of its training participants. As such, the following protocols are followed:

- The Pearl utilizes Google Forms for its training registration and participant information gathering platform. These forms are only accessible to the authorized representatives of The Pearl and only as necessitated for the proper conducting and facilitation of the training.
- The information gathered through said forms are only utilized for the purpose of the training for which the participant has registered.
- In the event of a breach of confidentiality, the participant will be notified immediately via email or phone to determine the next steps to reduce the impact of the confidentiality breach.
- In order to receive credit hours for a Continuing Education program, the participant must attend the full time of the program for which the credit hours are being offered. Partial credit hours will not be offered. If there is a discrepancy of the attendance verification between the program provider and the participant, the participant must file a grievance following the “Participant Grievance Procedure” stated previously in this document.
- Participant attendance records & registration information will be kept for a minimum of five (5) years from the date of the training. The information will be housed in a digital format in a Google Drive accessible by the Training Director & the authorized representative of The Pearl.