

clinical supervision template

Clinical supervision is a cornerstone of professional development and ethical practice in many helping professions, including counseling, social work, psychology, and therapy. Understanding and utilizing a robust clinical supervision template is crucial for both supervisors and supervisees. This article delves deep into what constitutes an effective clinical supervision template, its essential components, the benefits it offers, and how to tailor it to specific professional needs. We will explore the legal and ethical considerations surrounding clinical supervision, best practices for documentation, and how a well-structured template can foster growth, ensure accountability, and ultimately enhance client care. Whether you are a seasoned supervisor seeking to refine your process or a supervisee looking to maximize your learning, a comprehensive understanding of the clinical supervision template is invaluable.

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Understanding the Purpose of a Clinical Supervision Template

A clinical supervision template serves as a structured framework designed to guide and document the supervisory process. It ensures that all essential aspects of professional development, client care, and ethical conduct are addressed systematically. Without a consistent template, supervision sessions can become haphazard, leading to missed opportunities for growth and potential compliance issues. The primary purpose is to create a predictable and thorough approach to supervision, benefiting both the supervisor and the supervisee by providing clarity, direction, and a record of progress.

Key Objectives of Clinical Supervision

Effective clinical supervision aims to achieve several critical objectives. Firstly, it focuses on the development of the supervisee's clinical skills, fostering their competence in assessment, diagnosis, treatment planning, and intervention. Secondly, it emphasizes the supervisee's professional and personal growth, encouraging self-awareness, ethical decision-making, and resilience. Lastly, it ensures accountability and adherence to professional standards and legal requirements, ultimately safeguarding client welfare. A well-designed template acts as a roadmap to achieving these multifaceted goals.

Benefits of a Standardized Clinical Supervision Template

Implementing a standardized clinical supervision template offers numerous advantages. For supervisors, it streamlines the process, ensuring consistency across supervisees and sessions. It aids in organizing thoughts, tracking progress, and preparing for each meeting. For supervisees, it provides a clear agenda and a record of their learning, feedback, and development. This structure promotes active participation, facilitates goal setting, and creates a tangible measure of their journey towards professional competence. Moreover, it offers a valuable resource for accreditation, licensing, and professional review.

Essential Components of a Comprehensive Clinical Supervision Template

A robust clinical supervision template is more than just a checklist; it's a dynamic tool that captures the essence of the supervisory relationship and the supervisee's professional journey. Each section is designed to elicit specific information, facilitate discussion, and document key outcomes. By including a structured set of components, supervisors and supervisees can ensure that no critical area is overlooked, leading to more effective and efficient supervision.

Supervisee Information and Session Details

This foundational section typically includes basic identifying information such as the supervisee's name, the supervisor's name, the date of the session, and the duration. It might also include the specific setting or agency where the supervision is taking place. This administrative data is crucial for record-keeping and for providing context for the subsequent content discussed during the session. It sets the stage for the meeting by establishing the logistical parameters.

Review of Previous Session's Action Items

A critical element of any effective clinical supervision template is the follow-up on previously established goals or action items. This segment ensures accountability and continuity in the learning process. It involves a brief discussion of what the supervisee accomplished since the last meeting, any challenges encountered, and insights gained. This review reinforces the importance of implementing feedback and encourages proactive engagement with supervisory guidance.

Case Presentations and Discussion

This is often the core of the supervision session. The template should provide space for the supervisee to outline specific client cases they wish to discuss. This includes details about the client, the presenting problem, the supervisee's assessment and conceptualization, treatment plan, interventions used, and the client's progress. The template might prompt for specific questions or areas of concern the supervisee has regarding the case, facilitating targeted feedback and collaborative problem-solving. This component is vital for skill development and for ensuring ethical and effective client care.

Supervisee's Professional Development and Skill Building

Beyond case discussions, a comprehensive clinical supervision template should also address the supervisee's broader professional growth. This involves identifying areas where the supervisee feels confident and areas where they seek further development. It might include discussions about specific therapeutic techniques, diagnostic skills, ethical dilemmas, or interpersonal dynamics in therapy. Setting goals for skill acquisition and professional learning is a key function of this section.

Ethical Considerations and Professional Boundaries

Ethical practice is paramount in all helping professions. The template must provide a dedicated space to discuss any ethical challenges the supervisee has encountered or anticipates. This could involve issues related to confidentiality, dual relationships, informed consent, or cultural competence. Discussions about maintaining professional boundaries with clients and colleagues are also essential. This section ensures that ethical principles are consistently applied and that the supervisee is supported in navigating complex ethical landscapes.

Supervisory Process and Relationship Feedback

A healthy supervisory relationship is built on open communication and mutual respect. The clinical supervision template can facilitate feedback on the supervisory process itself. Both the supervisor and supervisee can comment on what is working well in their relationship and what could be improved. This meta-communication ensures that the supervision is meeting the needs of both parties and can help to identify and address any potential ruptures or misunderstandings in the supervisory alliance.

Goals for the Next Supervision Period

Concluding each session with clearly defined goals for the upcoming period is crucial for maintaining momentum. This section outlines specific objectives the supervisee will focus on, both in their client work and in their professional development, before the next supervision meeting. These goals should be SMART (Specific, Measurable, Achievable, Relevant, Time-bound) and directly linked to the discussions and feedback provided during the session. This ensures that the learning from supervision is translated into actionable steps.

Supervisor's Assessment and Recommendations

The supervisor's perspective is vital. This section allows the supervisor to offer their assessment of the supervisee's progress, strengths, and areas for continued growth. It can include specific recommendations for further learning, practice, or areas that require closer attention. This documented feedback provides a clear record of the supervisor's evaluation and guidance, supporting the supervisee's development and informing future supervisory planning.

Signatures and Dates

Finally, a clinical supervision template typically includes signature lines for both the supervisor and the supervisee, along with the date. This signifies that both parties have participated in the session, reviewed the documentation, and agree with the content. It serves as a formal acknowledgment of the supervisory agreement and the documented progress within the supervisory relationship.

Developing Your Clinical Supervision Template

Creating or adapting a clinical supervision template requires careful consideration of the specific needs of the profession, the agency, and the individuals involved. A one-size-fits-all approach may not be optimal, and tailoring the template can significantly enhance its

utility and effectiveness. This section explores the key considerations and steps involved in developing a personalized and functional clinical supervision template.

Assessing Your Specific Needs and Context

Before drafting or selecting a template, it's essential to understand the unique context of your supervision. Consider the profession (e.g., counseling, social work, psychotherapy), the level of experience of the supervisee (e.g., intern, licensed professional), and the requirements of any licensing or accreditation bodies. Agency policies and philosophical approaches to supervision should also be taken into account. This assessment will help determine which components are most critical and how they should be prioritized.

Incorporating Best Practice Guidelines

Numerous professional organizations offer guidelines and best practices for clinical supervision. Familiarizing yourself with these recommendations from bodies like the American Psychological Association (APA), the National Association of Social Workers (NASW), or the Association for Counselor Education and Supervision (ACES) is crucial. These guidelines often dictate essential elements that should be included in supervision documentation to ensure ethical and competent practice. A good clinical supervision template will align with these established standards.

Customizing for Different Supervision Models

Various theoretical models inform clinical supervision, such as developmental models, social role models, or integrative models. The chosen supervision model may influence the emphasis placed on certain components within the template. For instance, a developmental model might require more explicit tracking of the supervisee's stage of professional development, while a more skills-focused model might concentrate heavily on case conceptualization and intervention techniques. Ensure your template supports the approach you are using.

Ensuring Clarity and Usability

A clinical supervision template should be clear, concise, and easy to use for both the supervisor and the supervisee. Avoid overly complex jargon or unnecessarily lengthy sections. The layout should be logical and intuitive, allowing for efficient completion and review. Consider the format – whether it will be a paper document, a Word document, or a digital platform – and ensure it is user-friendly. A template that is cumbersome or confusing is less likely to be used consistently or effectively.

Iterative Review and Refinement

Developing a clinical supervision template is often an iterative process. It's beneficial to pilot the template with a few supervisees and solicit feedback. Based on this feedback, you can refine the sections, clarify instructions, or add/remove components as needed. Regular review and refinement ensure that the template remains relevant, practical, and aligned with evolving professional standards and the needs of those it serves.

Legal and Ethical Considerations in Clinical Supervision Documentation

The documentation generated through clinical supervision is not merely a formality; it carries significant legal and ethical weight. Meticulous record-keeping is essential for accountability, protection, and the overall integrity of the supervisory process. Understanding the legal and ethical implications of what is documented, how it is stored, and who has access to it is paramount for both supervisors and supervisees.

Confidentiality and Record Keeping

The information discussed in clinical supervision, particularly regarding client cases, is highly confidential. The clinical supervision template and the records derived from it must adhere to strict confidentiality guidelines, typically aligned with HIPAA (Health Insurance Portability and Accountability Act) in the United States or similar privacy regulations in other jurisdictions. This includes ensuring that records are stored securely, accessible only to authorized individuals, and disposed of appropriately when no longer needed. Supervisees must understand their role in maintaining client confidentiality within the supervisory context.

Client Protection and Risk Management

Documentation serves as a critical tool for client protection and risk management. By thoroughly documenting case conceptualizations, treatment plans, interventions, and the supervisee's progress, supervisors can identify and address potential risks to clients early on. The clinical supervision template should facilitate the recording of discussions about client safety, potential harm, and the steps taken to mitigate risks. This thoroughness can be vital in legal or ethical inquiries.

Licensing Board Requirements and Accreditation

Standards

Licensing boards for professions like counseling, social work, and psychology often have specific requirements for supervision documentation. These may include the frequency of supervision, the types of content that must be covered, and how records should be maintained. Similarly, accreditation bodies for training programs may have their own standards for documenting the supervisory experience. A well-designed clinical supervision template will incorporate these essential requirements, ensuring that the supervisee meets all necessary criteria for licensure and professional standing.

Informed Consent in Supervision

Just as clients provide informed consent for treatment, supervisees should understand the nature of the supervisory relationship, including expectations for documentation. The initial supervisory agreement, often a component of or referenced by the clinical supervision template, should outline how records will be kept, who will have access to them, and the limits of confidentiality within the supervisory context. This ensures transparency and ethical practice from the outset.

Documentation as Evidence of Competence

The detailed records kept using a clinical supervision template serve as tangible evidence of the supervisee's developing competence and the supervisor's oversight. This documentation can be reviewed by supervisors, agency administrators, or licensing boards to assess the quality of supervision and the supervisee's progress. It highlights the learning that has occurred, the skills that have been honed, and the ethical considerations that have been addressed, providing a comprehensive professional portfolio.

Best Practices for Using a Clinical Supervision Template

A clinical supervision template is only as effective as its implementation. Adhering to best practices ensures that the template maximizes its intended benefits, fostering a productive and growth-oriented supervisory relationship. Consistent and thoughtful application is key to unlocking the full potential of this structured approach.

Preparation is Key for Both Parties

Before each supervision session, both the supervisor and the supervisee should come prepared. The supervisee should complete the relevant sections of the clinical supervision

template pertaining to their case presentations and any questions they have. The supervisor should review the supervisee's submitted materials and prepare their own notes and feedback. This shared preparation ensures that supervision time is used efficiently and effectively, focusing on discussion and problem-solving rather than administrative tasks.

Active Listening and Open Communication

The supervisory relationship thrives on open communication and active listening. The template provides a structure for discussion, but the quality of the dialogue depends on the participants' engagement. Supervisors should listen attentively to the supervisee's concerns and insights, and supervisees should feel comfortable sharing their experiences, challenges, and learning edges. The clinical supervision template should encourage this open exchange by providing prompts for reflection and feedback.

Regularly Reviewing and Updating the Template

As mentioned earlier, professional standards, ethical guidelines, and the specific needs of supervisees can evolve. Therefore, it is a best practice to regularly review and update the clinical supervision template. This might involve making minor adjustments based on feedback or undertaking a more significant overhaul if major changes in the field or in your practice occur. Keeping the template current ensures its continued relevance and effectiveness.

Balancing Structure with Flexibility

While a template provides essential structure, it should not stifle spontaneous and critical discussions that may arise. Supervisors should be able to deviate from the strict agenda of the template when important issues or emergent concerns need to be addressed. The clinical supervision template should be seen as a guide, not a rigid constraint. The ability to be flexible ensures that supervision remains responsive to the immediate needs of the supervisee and their clients.

Focusing on Growth and Skill Development

The ultimate goal of clinical supervision is to foster the professional growth and skill development of the supervisee. Each section of the clinical supervision template should be approached with this objective in mind. Discussions should be framed constructively, focusing on learning opportunities and strategies for improvement. The supervisor's role is to guide, mentor, and support the supervisee in reaching their full potential, and the template should facilitate this process.

Adapting Clinical Supervision Templates for Different Professions

The foundational principles of clinical supervision are universal, but the specific content and emphasis within a clinical supervision template often need to be adapted to the unique demands and ethical codes of different helping professions. What might be a critical focus in social work supervision, for instance, may have a different nuance in psychology or marriage and family therapy. Tailoring the template ensures its relevance and utility.

Counseling and Psychotherapy

For counselors and psychotherapists, a clinical supervision template will likely place significant emphasis on client case conceptualization, treatment planning, the application of specific therapeutic modalities (e.g., CBT, DBT, psychodynamic), and ethical considerations related to client-therapist relationships. Issues of transference and countertransference, boundary maintenance, and self-care for the therapist are also paramount. Documentation might focus on progress notes, treatment plan reviews, and adherence to ethical guidelines regarding client confidentiality.

Social Work

Social work supervision, as guided by the NASW Code of Ethics, often involves a broader scope, encompassing not only direct client services but also advocacy, community assessment, and case management. A social work clinical supervision template might include sections dedicated to exploring the client's systemic context, their social environment, resource navigation, and the supervisee's role in advocating for clients. Ethical dilemmas related to dual relationships, agency policies, and navigating complex bureaucratic systems are also frequently addressed.

Psychology (Clinical and Counseling)

Clinical and counseling psychology supervision often aligns closely with psychotherapy, but may also include a greater emphasis on psychological assessment and testing. A clinical supervision template for psychologists might incorporate discussions about the administration, scoring, and interpretation of psychological tests, as well as the integration of assessment data into treatment planning. Research competencies, evidence-based practice, and involvement in academic or scholarly activities might also be relevant components.

Other Allied Health Professions

Other allied health professions, such as occupational therapy, speech-language pathology, or audiology, may also utilize clinical supervision. While the core principles remain, the specific skills and knowledge areas being supervised will differ. For example, an occupational therapy clinical supervision template would focus on the evaluation and treatment of functional deficits, activity analysis, and adaptive equipment. The template should reflect the specific professional competencies and ethical frameworks of the discipline.

Key Considerations for Adaptation

When adapting a clinical supervision template, consider the following: The specific language and terminology used in the profession. The core ethical principles and codes of conduct that guide practice. The typical client populations and service delivery models. The required competencies for licensure or certification. The expectations of regulatory bodies and accrediting agencies. By thoughtfully incorporating these elements, the template becomes a more powerful and relevant tool for professional development.

The Role of Technology in Clinical Supervision Template Management

In today's digital age, technology offers powerful solutions for managing clinical supervision templates and the associated documentation. Electronic platforms can enhance efficiency, improve accessibility, and strengthen security, while also providing new avenues for communication and collaboration. Embracing these tools can streamline the supervisory process and improve the overall quality of record-keeping.

Electronic Health Records (EHR) and Practice Management Software

Many healthcare and mental health practices utilize Electronic Health Records (EHR) systems or practice management software that often include modules for supervision. These platforms can house clinical supervision templates, allowing for digital completion, storage, and retrieval of records. They can also facilitate scheduling, task management, and secure communication between supervisors and supervisees, creating a centralized hub for all supervisory-related activities.

Secure Cloud-Based Platforms and Apps

Beyond integrated EHR systems, numerous secure cloud-based platforms and specialized supervision apps are available. These tools are often designed with features specifically for supervision, such as shared document repositories, case note templates, goal tracking, and secure messaging. When choosing such a platform, it's crucial to ensure it complies with relevant data privacy regulations (e.g., HIPAA) and offers robust security measures to protect sensitive information. The usability of the interface is also a key consideration for consistent adoption.

Telehealth and Remote Supervision Tools

The rise of telehealth has made remote clinical supervision increasingly common. Technology plays a vital role in facilitating these virtual supervisory relationships. Video conferencing platforms, secure file-sharing services, and specialized telehealth software allow supervisors and supervisees to connect and collaborate effectively, regardless of their physical location. A clinical supervision template can be used within these remote sessions, ensuring that the structured content of supervision is still addressed despite the distance.

Benefits of Digital Template Management

Utilizing technology for clinical supervision template management offers several advantages: Increased efficiency through digital forms and automated processes. Improved accessibility, allowing access to records from various devices. Enhanced security through password protection, encryption, and audit trails. Better organization and easier retrieval of documentation. Facilitation of collaboration and communication between supervisor and supervisee. Streamlined compliance with record-keeping regulations.

Challenges and Considerations for Digital Adoption

While beneficial, the adoption of technology also presents challenges. Ensuring data security and compliance with privacy laws is paramount. Training for both supervisors and supervisees on using new platforms is necessary. There can be costs associated with software subscriptions or EHR integration. Furthermore, it's important to maintain the human element of supervision, ensuring that technology enhances rather than replaces the personal connection and therapeutic alliance that is central to effective supervision.

Measuring the Effectiveness of Your Clinical Supervision Template

Once a clinical supervision template is in place and being used, it's important to periodically assess its effectiveness. This evaluation ensures that the template is fulfilling its intended purpose and supporting the growth and development of supervisees while upholding ethical and professional standards. Measuring effectiveness allows for continuous improvement and adaptation.

Supervisee Feedback and Satisfaction

One of the most direct ways to gauge the effectiveness of a clinical supervision template is by soliciting feedback from the supervisees who use it. Anonymous surveys or structured feedback sessions can reveal what aspects of the template are most helpful, what could be improved, and whether the supervision process feels adequately supported by the documentation. High supervisee satisfaction often correlates with effective learning and professional development.

Supervisor Assessment of Supervisee Progress

Supervisors can also evaluate the template's effectiveness by observing the progress of their supervisees. Are supervisees demonstrating improved clinical skills, ethical reasoning, and professional self-awareness? Is the template facilitating clear communication about these areas and providing a framework for tracking growth over time? The supervisor's informed assessment of the supervisee's development, as documented through the template, offers crucial insights into its utility.

Review of Documentation Quality and Completeness

Regularly reviewing the documentation generated using the clinical supervision template can highlight its strengths and weaknesses. Is the documentation consistently complete, accurate, and reflective of the supervisory discussions? Are there recurring gaps or areas that are difficult to articulate within the template's structure? The quality of the records can be a strong indicator of how well the template guides the supervisory process.

Alignment with Professional and Ethical Standards

An ongoing measure of a clinical supervision template's effectiveness is its continued alignment with current professional guidelines, ethical codes, and licensing requirements. As these standards evolve, the template must be reviewed to ensure it remains compliant

and supportive of best practices. This might involve comparing the template's content against the latest recommendations from professional bodies or regulatory agencies.

Impact on Client Care and Outcomes

Ultimately, the effectiveness of clinical supervision, and by extension its template, is reflected in the quality of client care. While difficult to isolate as a sole factor, supervisors can reflect on whether the structured approach to supervision facilitated by the template has contributed to more competent and ethical client service delivery. Are supervisees better equipped to handle complex cases, navigate ethical dilemmas, and achieve positive client outcomes as a result of the supervisory process supported by the template?

Frequently Asked Questions

What are the key components typically found in a clinical supervision template?

A comprehensive clinical supervision template usually includes sections for supervisee and supervisor information, session goals, discussion points, assessment of supervisee's progress, identification of challenges, action plans, reflection on the supervisory relationship, and documentation of agreed-upon next steps.

How can a clinical supervision template be tailored to different therapeutic modalities (e.g., CBT, psychodynamic)?

The template can be adapted by adding modality-specific sections. For example, a CBT template might include space for reviewing cognitive distortions or behavioral experiments, while a psychodynamic template might focus on transference and countertransference dynamics or exploration of unconscious processes.

What ethical considerations should a clinical supervision template address?

Key ethical considerations include maintaining confidentiality, ensuring informed consent for supervision, addressing dual relationships, managing boundaries, recognizing and mitigating burnout, and adhering to professional codes of conduct. The template should have sections for supervisors and supervisees to acknowledge these.

How does a well-structured clinical supervision template benefit the supervisee?

A good template provides a clear framework for learning, facilitates focused discussions

on skill development and case conceptualization, ensures all crucial areas are covered, promotes self-reflection, and helps the supervisee track their progress and identify areas needing further attention, ultimately enhancing their competence and confidence.

What are the advantages of using a standardized clinical supervision template for both supervisors and institutions?

For supervisors, a template ensures consistency, efficient use of supervision time, and a clear record-keeping system. For institutions, it promotes quality assurance, facilitates compliance with accreditation standards, and provides a framework for evaluating the effectiveness of their supervision programs.

Where can I find reputable clinical supervision templates, and what makes them effective?

Reputable templates can often be found through professional organizations (e.g., APA, ACA), university training programs, and experienced clinical supervisors. Effective templates are clear, concise, comprehensive, flexible enough to adapt to individual needs, and aligned with best practices in clinical supervision and relevant ethical guidelines.

Additional Resources

Here are 9 book titles related to clinical supervision, each starting with i, with short descriptions:

1. Innovative Approaches to Clinical Supervision

This book explores cutting-edge methods and contemporary perspectives in clinical supervision. It delves into how supervisors can foster growth and development in supervisees through creative and adaptable techniques. The text covers a range of innovative models, emphasizing ethical considerations and the importance of building strong supervisory relationships. Readers will find practical strategies for enhancing supervisee self-awareness and professional identity.

2. Integral Supervision: Cultivating Holistic Practice

This title focuses on an integrated model of clinical supervision that considers the whole person of both the supervisor and supervisee. It emphasizes the importance of integrating various theoretical orientations and developmental stages into the supervisory process. The book provides guidance on how to address the emotional, cognitive, and spiritual dimensions of therapeutic work. It advocates for a supervisee-centered approach that promotes authenticity and ethical integrity.

3. Informed Consent in Supervision: Ethical Guidelines and Best Practices

This essential resource details the critical role of informed consent in establishing a clear and ethical supervisory relationship. It outlines the necessary components of a comprehensive informed consent document for clinical supervision. The book offers practical advice for navigating complex ethical dilemmas related to consent and boundaries. It emphasizes transparency and mutual understanding as foundational

elements for effective supervision.

4. Interpersonal Dynamics in Clinical Supervision

This book examines the nuanced interpersonal dynamics that shape the supervisory alliance. It explores how communication styles, personality traits, and power differentials influence the supervisory relationship. The text provides insights into building trust, managing conflict, and fostering a collaborative environment. Readers will gain a deeper understanding of the psychological underpinnings of effective supervisory interactions.

5. Instructional Strategies for Effective Supervision

This title offers a practical guide to diverse instructional methods that supervisors can employ to enhance supervisee learning. It covers techniques ranging from modeling and role-playing to case conceptualization and feedback delivery. The book emphasizes tailoring teaching strategies to individual supervisee needs and developmental levels. It aims to equip supervisors with the tools to facilitate skill acquisition and critical thinking.

6. Integrating Reflective Practice in Supervision

This book highlights the transformative power of reflective practice within the supervisory context. It outlines methods for encouraging supervisees to critically examine their experiences, biases, and interventions. The text provides frameworks for fostering self-awareness and professional growth through structured reflection. Readers will learn how to cultivate a supervisory environment that prioritizes introspection and continuous learning.

7. In-Depth Case Analysis in Supervision

This resource provides supervisors with robust strategies for conducting thorough case analyses with their supervisees. It emphasizes the importance of exploring theoretical underpinnings, clinical interventions, and client progress. The book offers structured approaches to dissecting complex clinical material and identifying areas for supervisee development. It aims to sharpen diagnostic skills and treatment planning abilities.

8. Intercultural Competence in Supervision

This book addresses the critical need for cultural awareness and sensitivity in clinical supervision. It explores how to navigate cross-cultural issues that may arise in the supervisory relationship and in therapeutic work. The text provides frameworks for developing culturally responsive supervisory practices. It emphasizes understanding diverse worldviews and their impact on therapeutic relationships and supervision.

9. Impacting Supervisee Resilience: A Supervisor's Guide

This title focuses on how supervisors can actively foster resilience in their supervisees, helping them cope with the emotional demands of clinical work. It offers strategies for building self-care practices, managing stress, and developing coping mechanisms. The book explores how to create a supportive supervisory environment that promotes well-being and prevents burnout. It emphasizes the supervisor's role in nurturing the long-term sustainability of their supervisees' careers.

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