Instagram setup and ethics checklist

The setup steps from Meta's own help pages, the bio and testimonial rules from the ACA code and Oregon's board, and the standing habits that keep a practice account out of trouble.

Setup

- [ ] A separate practice account, not the personal one; switching a private account to professional makes it public and accepts pending follow requests
- [ ] Switched to a professional account: More, Settings and activity, Account type and tools, Switch to professional account; choose Business
- [ ] A practice Facebook Page you fully control, created before linking
- [ ] Instagram account connected to that Page; access limited to people who should manage both
- [ ] Practice email and phone on the profile, and a booking link that goes to your own site

Bio

- [ ] Name and credential exactly as the board issued it (ACA C.3.a)
- [ ] Registered associates: associate title in full plus the supervisor's name and the word supervisor (OAR 833-050-0111)
- [ ] City, who you work with, how to book; nothing else

Posting rules

- [ ] Service framing, never condition framing: describe what you offer, not the reader's diagnosis
- [ ] No client stories, no client photos, no session details, even anonymized
- [ ] Every carousel slide stands on its own without the caption
- [ ] Five hashtags at most
- [ ] Posts batched monthly; one feed post a week; stories only when something happened

Testimonials, comments and messages

- [ ] Never ask a client for a post, a tag or a review (ACA C.3.b; OAR 833-100-0012(3))
- [ ] A testimonial that arrives unasked is not reposted without the permission conversation the ACA describes, and usually not at all
- [ ] Comment replies give general information and never confirm or deny that the commenter is a client
- [ ] A saved direct-message reply that moves anything about care to the phone
- [ ] Comments and messages checked once a day at a set time

Every quarter

- [ ] Bio re-read against the board's register; supervisor and hours updated
- [ ] Page connection and access list reviewed
- [ ] Decide whether the account is bringing anyone in; stop without guilt if not

Meta's steps change; the lesson links the current help pages. Ethics quotes are in the lesson with sources. Not legal advice.