Appendix 1: Candidate Learning Record

Level 5 Award in Online and Phone CounsellingPractice

(OPCP-L5)

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| **OPCP-L5** |  |  |
| LEARNING OUTCOME: | 1. Work safely, legally and ethically as an online and phone counsellor |  |
| **Assessment criteria** | **Candidate guidance to criteria** | **Portfolio Reference** |
| 1.1 Work within a professional, legal and ethical framework for online and phone counselling. | * Explore legislation, equal opportunities, anti-discriminatory laws and human rights relating to online and phone counselling. * Recognise how international counselling work differs from that based in the UK. * Explain how the context of online and phone counselling relates to your digital skills and footprint. Study (for example) [BACP Working online in the counselling professions Fact Sheet](https://www.bacp.co.uk/events-and-resources/ethics-and-standards/good-practice-in-action/gpia047-working-online-fs/) * Demonstrate establishing a client/counsellor agreement/contract appropriate to online and phone counselling. |  |
| 1.2 Work within limits of competence and make referrals or signpost appropriately. | * Recognise when and where to refer clients for an alternative mode of counselling. * Demonstrate working empathically with clients to manage the referral or signposting process collaboratively in skills practice. |  |
| 1.3 Demonstrate ability to manage ethical dilemmas in online and phone counselling. | * Use case scenarios to explore responses to ethical challenges and dilemmas in online and phone counselling. * Evaluate a dilemma such as; [Dilemma: Online working and social media etiquette (BACP](https://www.bacp.co.uk/bacp-journals/therapy-today/2019/december-2019/dilemmas/)) * Demonstrate ethical responses to ethical challenges and dilemmas and challenges in online and phone counselling work. |  |
| 1.4 Respond to and manage issues of confidentiality and data protection. | * Demonstrate the ability to manage the limits of client confidentiality and explore how to manage this when client and counsellor are in separate spaces * Explain how data is stored securely in online and phone counselling work and how a data breach would be managed. |  |
| 1.5 Monitor and work with issues of safeguarding, risk and emergency situations in online and phone counselling | * Compare the nature of risk in online/ phone counselling work and explain the range of risks which could affect the client and counsellor. * Explain strategies and tools for risk assessment and risk management in your own setting compared with others in your training group. * Demonstrate how risks are worked with in online / phone counselling. |  |
| LEARNING OUTCOME: | 2. Work with complex aspects of the online and phone counselling relationship |  |
| **Assessment criteria** | **Candidate guidance to criteria** | **Portfolio Reference** |
| 2.1 Establish and maintain therapeutic relationships in online and phone counselling settings. | * Critically reflect on the impact of a virtual context for the therapeutic relationship. * Review online sources of information about online counselling relationships such as: * [The Online Therapeutic Relationship (UEL)](https://repository.uel.ac.uk/download/25d7b0bba653e6c69d1b62eb08d2ec8b686e0edcf43ff719bc77b58da39e830f/912841/2013_PsyD_Tsalavouta.pdf) * [Online relationship counselling (BACP)](https://www.bacp.co.uk/about-therapy/what-therapy-can-help-with/relationships/online-relationship-counselling/) * [Trust in Online Therapeutic Relationships: The Therapists Experience (OU)](http://oro.open.ac.uk/17204/) * Review literature on attachment in online communication e.g., [E-attachment and online communication](https://www.taylorfrancis.com/books/oa-mono/10.4324/9781003221043/attachment-online-communication-bernadetta-izydorczyk-katarzyna-sitnik-warchulska-zbigniew-wajda) * Demonstrate establishing and maintaining a safe online and phone therapeutic relationship. |  |
| 2.2 Establish and sustain personal and professional boundaries for the duration of online and phone counselling relationships. | * Reflect on boundaries for online and phone counselling work. * Consider guidelines for boundaries for online counselling work such as: * [Maintaining boundaries when working online (ACTO)](https://www.acto.org.uk/maintaining-boundaries-when-working-online/) * [Out of the frame: Boundaries in online psychotherapy (Journal of Psychiatry reform)](https://journalofpsychiatryreform.com/2020/04/29/out-of-the-frame-boundaries-in-online-psychotherapy/) * Discuss the implications of an online or phone therapeutic frame for the counselling relationship. * Demonstrate establishing and maintaining a secure base in online and phone counselling. |  |
| 2.3 Work with challenges, difficulties and containment issues that arise in online and phone counselling. | * Identify fantasies relating to self and client such as romantic or sexual; idealisation; rescue; dependency; role reversal etc. * Reflect on where disinhibition and other difficulties are evident in the therapeutic relationship for the counsellor and/or client. * Use (for example) [Interpersonal Process Recall (IPR)](https://www.counseling.org/resources/library/eric%20digests/94-10.pdf) to develop awareness. * Demonstrate how you work empathically and without judgement with fantasy and disinhibition throughout the therapeutic relationship. |  |
| LEARNING OUTCOME: | 3. Work with difference and diversity in online and phone practice |  |
| **Assessment criteria** | **Candidate guidance to criteria** | **Portfolio Reference** |
| 3.1 Evaluate ability to work with diverse communities in online and phone counselling | * Recognise diversity issues in online and phone counselling. * Demonstrate working with diversity issues in online and phone counselling. |  |
| 3.2 Reflect on diversity issues that can challenge access to online or phone counselling. | * Recognise barriers in accessing online and phone counselling * Select software and/or support which widens access for online/phone counselling to some clients. * Demonstrate working with barriers to enable online/phone counselling for clients. |  |
| 3.3 Use empathy to communicate understanding and acceptance in online and phone counselling. | * Demonstrate the ability to convey empathy without the use of nonverbal communication. * Reflect on own ability to empathise with client issues. * Recognise any blocks to accepting a range of clients and specific client groups. |  |
| LEARNING OUTCOME: | 4. Use a coherent approach to respond to the needs of individual clients in online and phone counselling |  |
| **Assessment criteria** | **Candidate guidance to criteria** | **Portfolio Reference** |
| 4.1 Use a recognised client assessment tool to assess client suitability for online and phone counselling. | * Describe client factors for suitability for online/phone counselling. * Describe how assessment identifies client suitability for online and phone counselling. * Explain how online tools support client assessment in online and phone counselling. * Select resources exploring suitability for online/phone counselling. * Reflect on literature which explores assessing suitability for online counselling such as: [Assessing a Person’s Suitability for Online Therapy: The ISMHO Clinical Case Study Group. JOHN SULER, Ph.D.](https://www.researchgate.net/publication/11559122_Assessing_a_Person's_Suitability_for_Online_Therapy_The_ISMHO_Clinical_Case_Study_Group) * Demonstrate conducting client assessments in online and phone counselling. |  |
| 4.2 Negotiate a collaborative working agreement to establish a focus for the work for online and phone counselling. | * Reflect on the importance of negotiating a collaborative working agreement for online and phone counselling. * Demonstrate establishing a working agreement in online and phone counselling. |  |
| 4.3 Review and respond to the changing needs of the client in online and phone counselling. | * Demonstrate reviewing a client’s needs during the middle and ending phases of online and phone counselling. * Demonstrate that you understand how to manage challenging situations resulting from the review process – e.g., a client who wants to end the counselling suddenly or change the format of the counselling unexpectedly. |  |
| LEARNING OUTCOME: | 5. Work with self-awareness as an online and phone practitioner |  |
| **Assessment criteria** | **Candidate guidance to criteria** | **Portfolio Reference** |
| 5.1 Evaluate own use of self to create meaningful therapeutic connections in online and phone counselling. | * Reflect on own ability to experience connection when working online or by phone. * Recognise personal challenges to creating a meaningful connection in online and phone work. |  |
| 5.2 Evaluate the personal and professional impact and risks of lone working in online and phone counselling. | * Explain how you work within the lone working policy of your agency (if applicable) or in independent practice. * Demonstrate that you understand how to manage the impact of lone working on risk situations where the client is in a different physical space. |  |
| 5.3 Reflect on own experiences that might enhance or limit working with online and phone counselling | * Describe the potential impact of: lack of accessible and immediate support, screen fatigue, internal resources to manage the situation, vicarious trauma. * Review the impact of lone working on own self. |  |
| LEARNING OUTCOME: | 6. Use theory, research and skills within a coherent framework for online and phone counselling practice |  |
| **Assessment criteria** | **Candidate guidance to criteria** | **Portfolio Reference** |
| 6.1 Evaluate the application of your modality within online and phone counselling. | * Explain how online/phone counselling is integrated within a chosen modality and use of media. * Identify benefits and challenges to working with your modality online or by phone. |  |
| 6.2 Demonstrate use of skills and techniques associated with your modality in online and phone counselling. | * Compare different media to identify potential barriers to meaningful therapeutic relationships. * Explain how individual clients’ needs are met through working on different platforms. * Demonstrate practicing using a range of technologies to demonstrate the use of skills and techniques associated with your theoretical model. |  |
| 6.3 Use research findings to evaluate application of skills in online and phone counselling. | * Compare research findings on therapists' experiences of working online. * Evaluate own experience of working online or by phone. |  |
| LEARNING OUTCOME: | 7. Work self-reflectively to monitor and maintain professional effectiveness as a counsellor in online and phone practice |  |
| **Assessment criteria** | **Candidate guidance to criteria** | **Portfolio Reference** |
| 7.1 Use feedback to evaluate own effectiveness as an online and phone counsellor. | * Demonstrate skills and techniques which were effective in online and phone counselling practice. * Evaluate feedback regarding effectiveness of own online and phone practice. |  |
| 7.2 Reflect on areas for development as an online and phone counsellor and outline a plan for continuing professional development. | * Present ways to establish and maintain own resilience when working online and by phone. * Describe ways to support continuing professional development for online and phone counselling. |  |

Appendix2: Completion Statement for OPCP-L5

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| Completion statement for Candidate Learning Record  Level 5 Award in Online and Phone Counselling Practice (OPCP-L5) | | | |
| Learning Outcome | Title | Contra-indications present Y/N | Tutor signature if learning outcome has been achieved |
| 1 | Work safely, legally and ethically as an online and phone counsellor |  |  |
| 2 | Work with complex aspects of the online and phone counselling relationship |  |  |
| 3 | Work with difference and diversity in online and phone practice |  |  |
| 4 | Use a coherent approach to respond to the needs of individual clients in online and phone counselling |  |  |
| 5 | Work with self-awareness as an online and phone practitioner |  |  |
| 6 | Use theory, research and skills within a coherent framework for online and phone counselling practice |  |  |
| 7 | Work self-reflectively to monitor and maintain professional effectiveness as a counsellor in online and phone practice |  |  |

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| *To be completed by core tutor:*  Where the learning outcome has not been achieved please:   1. state clearly which learning outcome this relates to. 2. give specific and relevant reasons why the learning outcome has not been achieved. 3. record proposed course of action agreed between trainer and candidate to address/remedy concerns. | | |
| **Learning outcome** | **Details of relevant contra-indications** | **Proposed course of action** |
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I declare this Candidate Learning Record to be a true and authentic record of evidence submitted in my portfolio:

Candidate name: Candidate signature: Date:

I declare that this Completion Statement is a true record of the candidate’s achievement: 

I declare that this candidate has achieved all the above qualification requirements for OPCP-L5: 

Tutor name: Tutor signature: Date: