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2024 - 2025

Candidate Guide

Level 5 Award in Online and Phone Counselling Practice (OPCP-L5)

Counselling & Psychotherapy Central Awarding Body (CPCAB)

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Please note:

This document, along with candidate support materials, can be downloaded from the [CPCAB Website](#). These provide you with the information needed to enable you to maximise your learning on this course and to complete the qualification successfully. If you need help with the accessibility of this document, please email contact@cpcab.co.uk with your request.

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1. Introduction for Candidates

This qualification is designed to give candidates the additional skills and proficiencies to work effectively using online and phone mediums. It equips candidates to work in a counselling role offering online and phone therapy in an organisational context or in independent practice.

Before studying this qualification, you will need to have first completed the two Open University courses below which provide the theoretical basis for this level 5 award:

[Online counselling: getting started](#)

And

[Online counselling: advancing your knowledge](#)

The qualification includes training on how to:

- » Work safely, legally and ethically as an online and phone counsellor.
- » Work with complex aspects of the online and phone counselling relationship.
- » Work with difference and diversity in online and phone practice.
- » Use a coherent approach to respond to the needs of individual clients in online and phone practice.
- » Work with self-awareness as an online and phone practitioner.
- » Use theory, research and skills within a coherent framework for online and phone counselling practice.
- » Work self-reflectively to monitor and maintain professional effectiveness as a counsellor in online and phone practice.

2. Qualification Structure

This qualification is made up of 7 mandatory learning outcomes, each of which has associated assessment criteria. This structure is based on the 7 processes of the [CPCAB's Model](#).

Tip:

Think of the assessment criteria as learning tasks which you must complete and then record so that your tutor can see you have achieved the task.

To achieve the qualification, you **MUST** be internally assessed by your tutor as **Proficient** in all 7 learning outcomes in order to achieve the qualification.

This qualification is eligible for **fully online delivery only** and requires CPCAB centre recognition for online delivery. Please see [how to run CPCAB's qualifications online](#) for more information.

3. Internal Assessment

Art students keep a portfolio of their coursework which they use to show other people what they, as artists, have learnt. In a similar way you need to keep a portfolio of your coursework, which you can use to show your tutor what you have learnt. Keeping a portfolio of your coursework will not only provide your tutor with evidence of your learning, but also really help you with the learning process itself.

You also need to complete Appendix 1, your Candidate Learning Record (CLR), to signpost the evidence for each assessment criterion. The CLR has brief notes beside each assessment criterion to help you understand what is being asked for and guidelines on how to record your learning.

You must give **two** pieces of evidence for each criterion. In addition, the CLR (when complete) must include references to the following three types of course work:

Documents – You must include a learning review, a self-review, and the Practice Review (3000-3500 words). You might also include tutorial records (when written by the you) and notes on your personal development.

Tutor observation – You must include records of tutor feedback on your online and phone counselling practice sessions. You might also include tutorial records (when written by the tutor), tutor feedback on group discussions (including contributions to group-work and group training supervision).

Testimony – You must include records of peer feedback on your online and phone counselling practice sessions. You might also include, for example, peer feedback on group discussions (including contributions to group-work and group training supervision).

See [OPCP-L5 Specification](#) for a summary of the minimum assessment requirements.

CPCAB recommends that you connect a Criteria Assessment Sheet (CAS) to any work you hand in for assessment. You can use the CAS sheets to indicate which criteria have been met and tutors will offer you formative feedback throughout the course.

Tip:

Meeting criteria is important, but the overall learning experience should **not** be criteria driven. The journey is as important as the destination.

After you have completed your portfolio your tutor will look at the evidence you have referenced in your Candidate Learning Record (CLR) and assess whether or not you have completed the assessment criteria, achieved the learning outcomes and met all the other qualification requirements. They may decide that you are not yet Proficient – and will identify what you still need to complete/achieve and how you might work towards doing this.

- Your tutor will give you further guidance on developing your portfolio, the three types of coursework and filling in the Candidate Learning Record.

The final assessment of your work is recorded on the Appendix 2 Completion Statement at the end of your Candidate Learning Record.

Tip:

It is important to realise that simply presenting evidence to meet criteria may not be sufficient to meet the overall learning outcomes and/or the qualification requirements. Your tutor may have observed substantive evidence which indicates that a specific assessment criterion or learning outcome has not been met despite evidence you have submitted.

Please note that all the work you include in your portfolio is *assessable material*, so it may be seen not just by your tutor but also by all those involved in your training centre's internal assessment process or any associated appeal or complaint. Such people will include the internal moderator and verifier as part of internal quality assurance (IQA) as well as the CPCAB independent verifier.

4. Equal Opportunities and Reasonable Adjustments

In order to make sure that assessment is fair to all candidates, CPCAB requires all registered centres to have an effective candidate support system in place and to make appropriate arrangements to meet individual assessment needs. You can ensure that your own learning and assessment needs are being met by discussing your own needs/difficulties with your tutor, who can ensure that you receive the appropriate support at your centre. Please talk to your centre prior to your enrolment and about any additional support that you may need regarding learning and assessment.

Please see CPCAB's [Reasonable Adjustment Guidance for Centres](#).

Both CPCAB and centres are required to recognise and comply with both the spirit and the word of equal opportunities legislation. Previous Acts were amalgamated into the Equality Act 2010.

See [CPCAB's Equal Opportunities Policy](#).

5. Appeals and Complaints

CPCAB are committed to maintaining standards across our recognised centres so that the public can have confidence in us and our qualifications. We provide our own complaints and appeals policies for the benefit of centres and candidates.

- Please view our policies on Complaints, Appeals and Whistleblowing on the [CPCAB website](#).

All CPCAB approved centres are required to have a complaints and appeals procedure which is available to candidates. Candidates must address all appeals about internal assessment or complaints about any aspect of their learning experience on the course via the centre's own internal complaints and appeals

procedures. It is the centre's responsibility to make these procedures available to candidates. Candidates who contact CPCAB directly on these issues will normally be directed back to their centre.

6. Candidate Feedback

Your feedback is vital to CPCAB to ensure the ongoing quality of our qualifications. Feedback enables us to meet our requirements as a regulated Awarding Organisation and contributes towards our annual qualification review process. Please ensure that you complete the online feedback survey at the conclusion of your course.

Please click on this link to access the survey - [Candidate feedback](#).

Appendix 1: Candidate Learning Record

Level 5 Award in Online and Phone Counselling Practice (OPCP-L5)

When you have completed your Candidate Learning Record, please tick the following box to confirm that you have provided evidence for each of the 7 learning outcomes:

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.	<ul style="list-style-type: none"> ❖ 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 ❖ 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.	<ul style="list-style-type: none"> ❖ 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.	<ul style="list-style-type: none"> ❖ 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) ❖ 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.	<ul style="list-style-type: none"> ❖ 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.	<ul style="list-style-type: none"> ❖ 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 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.	<ul style="list-style-type: none"> ❖ Critically reflect on the impact of a virtual context for the therapeutic relationship. ❖ Review online sources of information about online counselling relationships such as: <ul style="list-style-type: none"> • The Online Therapeutic Relationship (UEL) • Online relationship counselling (BACP) • Trust in Online Therapeutic Relationships: The Therapists Experience (OU) ❖ Review literature on attachment in online communication e.g., E-attachment and online communication ❖ 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.	<ul style="list-style-type: none"> ❖ Reflect on boundaries for online and phone counselling work. ❖ Consider guidelines for boundaries for online counselling work such as: <ul style="list-style-type: none"> • Maintaining boundaries when working online (ACTO) 	

	<ul style="list-style-type: none"> • Out of the frame: Boundaries in online psychotherapy (Journal of Psychiatry reform) ❖ 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.	<ul style="list-style-type: none"> ❖ 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) 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	<ul style="list-style-type: none"> ❖ Recognise diversity issues in online and phone counselling. ❖ Demonstrate working with diversity issues in online and phone counselling. ❖ Reflect on the strengths and areas for development in your approach to working with diverse communities. 	
3.2 Reflect on diversity issues that can challenge access to online or phone counselling.	<ul style="list-style-type: none"> ❖ 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	<ul style="list-style-type: none"> ❖ Demonstrate the ability to convey empathy without the use of nonverbal communication. 	

acceptance in online and phone counselling.	<ul style="list-style-type: none"> ❖ 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.	<ul style="list-style-type: none"> ❖ 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. ❖ 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.	<ul style="list-style-type: none"> ❖ 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.	<ul style="list-style-type: none"> ❖ Demonstrate reviewing a clients' 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.	<ul style="list-style-type: none"> ❖ 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.	<ul style="list-style-type: none"> ❖ 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	<ul style="list-style-type: none"> ❖ 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.	<ul style="list-style-type: none"> ❖ 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.	<ul style="list-style-type: none"> ❖ 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.	<ul style="list-style-type: none"> ❖ 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.	<ul style="list-style-type: none"> ❖ 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.	<ul style="list-style-type: none"> ❖ 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. 	

Appendix 2: Completion Statement for OPCP-L5

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		

To be completed by core tutor:

Where the learning outcome has not been achieved please:

- (a) state clearly which learning outcome this relates to.
- (b) give specific and relevant reasons why the learning outcome has not been achieved.
- (c) 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

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:

Appendix 3: Candidate Evaluation Form for OPCP-L5

We hope you have enjoyed your training. Please complete this evaluation form to provide CPCAB with your feedback. You can include your name if you like or keep your feedback confidential.

Candidate name:						
Centre name:						
Date you started:						
Date your course will finish:						
For the questions below, please mark the box that best matches your experience of the qualification.	Definitely agree	Slightly agree	Not sure	Slightly disagree	Definitely disagree	Not applicable
I found that the 2 pre-requisite Open University courses provided the knowledge I needed to enhance my practice in online and phone counselling.						
I found that online delivery of the course content has allowed me to apply concepts and techniques to my online and phone counselling.						
I found that the course was the right length for me to meet all the requirements.						
I found that I will be able to evolve my counselling practice as a result of this training.						
I found that I have been able to overcome challenges to online and phone counselling as a result of this training.						
I found that I have been able to maintain my modality within online and phone counselling as a result of this training.						
I have found my study enjoyable.						
Any other comments about the qualification						