2024 – 2025

Tutor Guide

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

Contents   Page

Appendices   Page

➤ This document can be downloaded from the CPCAB Website along with tutor support materials.

➤ Tutor resources to support your teaching are also available: shop, videos, YouTube

Find us on Facebook

Join the Tutor Facebook Group

Find us on LinkedIn

Watch us at CPCAB Videos

Discover new & interesting things at a New Vision for Mental Health

Qualifications that change lives cpcab

1. Introduction for Tutors

This qualification is designed to give qualified counsellors 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.

Candidates studying this qualification must first have 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

See the OPCP-L5 Specification for more information on qualification purpose.

2. Qualification Structure

The 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:**
>
> Encourage your candidates to think of the assessment criteria as 'learning tasks' which they complete and then record so that you can see they have achieved the task.

All the qualification information – including the **minimum assessment requirements** – is contained in the OPCP-L5 Specification.

The Learning Outcomes, Assessment Criteria and Guidance for Tutors can be found in Appendix 1 of this document.

To achieve the qualification candidates must be internally assessed by you, the tutor, as **Proficient** in all 7 learning outcomes.

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. Standardisation of Tutor Assessment

OPCP-L5 tutors **do not need to attend** standardisation training as this qualification is directly verified by CPCAB.

Qualifications that change lives   cpcab

4.   Candidate Registration

Candidates must be registered with CPCAB within six weeks of the course start date. Candidates who are not registered will not receive qualification certificates. Candidate registrations should be completed via the CPCAB portal and by the centre's exams department.

Please note that CPCAB has no responsibility for candidates who are not registered with CPCAB.

➢ Please see the CPCAB Guidance on How to Register your Candidates (CR0).

When registering candidates please be aware of the need to complete a Conflict of Interest Declaration (CR10) form to inform CPCAB of any dual relationships/conflicts of interest likely to compromise the integrity of the assessment process e.g. if a tutor has any other personal/professional relationship with a prospective candidate[1]. If in doubt, please contact CPCAB for further advice or information.

Minimum registration numbers

There is a minimum number of **6 candidates** that need to be registered per group.

The minimum numbers for candidate registrations per centre per year are:

- Levels 2 and 3: a total of 12 candidates per year
- Levels 4 to 6: a total of 9 candidates per year.

Please note that CPCAB reserves the right to refuse to register groups of fewer than 6 candidates.

If registrations are below this number when you register your group you will be prompted by the CPCAB portal to provide details on how this group size will be managed to enable all core assessment activities to take place, and all relational and inter-personal aspects of the course to be fully experienced by all candidates involved. You should also note a contingency plan for what would occur if group numbers reduced further.[2]

Candidate registration fees

Please see the CPCAB Fees documents for candidate registration fees and any additional fees the centre may incur.

CPCAB minimum and maximum group size requirements

Please note that the **minimum** tutor numbers are **mandatory**:

Levels 4 to 6:

- minimum of two tutors must be involved in internal assessment for higher level qualifications except LC-L4, CBT-L5 and OPCP-L5 which only require one. (CPCAB recommends the use of 2

---

[1] Please see the Conflict of Interest Policy on the CPCAB website for further guidance.
[2] Until this information is received, we will not be able to approve this registration. Please contact exams@cpcab.co.uk if your candidate group is less than the minimum requirements.

Qualifications that change lives cpcab

tutors for OPCP-L5 to maximise assessment of practical elements e.g. tutor observations of online and phone counselling skills practice).

- maximum of 16 candidates

5.   Internal Assessment

As the tutor you are responsible for carrying out internal assessment which is then internally moderated and verified at the centre and independently verified by CPCAB.

Candidates collect evidence of their learning in a portfolio and complete the Candidate Learning Record (CLR) found in the Candidate Guide, which is submitted with the portfolio to signpost the evidence for each criterion.

Candidates 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:[3]

1. **Documents** – Your candidate must include a learning review, a self-review, and the Practice Review (3,000 – 3,500 words). Your candidate might also include tutorial records (when written by the candidate) and notes on their personal development.

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

3. **Testimony** – Your candidate must include records of peer feedback on their online and phone counselling practice sessions. They 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.

Tip:

Make the portfolio requirements clear and encourage a consistent house style which includes clear areas for evidence when using an e-portfolio or other Learning Management System (LMS).

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

---

[3]   Please note that if it's appropriate the candidate can reference the same section of their portfolio, or the same piece of work a number of times.

Qualifications that change lives   cpcab

> **Tip:**
>
> Meeting criteria is important, but the overall learning experience should not be criteria driven, achieving this balance is down to your skill as a tutor. You can also encourage candidates to be creative.

It is important to explain to candidates that the work that they include in their portfolios is assessable material and cannot be kept completely confidential. Not only will it be assessed by you the tutor, but it may also be seen by all those involved in the 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.

6. Recording Final Results of Internal Assessment

At the end of the course you (the tutor) must look at the evidence referenced in the Candidate Learning Record (CLR) and assess whether the candidate has achieved all the learning outcomes and associated criteria (including referencing all three types of course work) and met all the qualification requirements. This final assessment is recorded on the Appendix 2 Completion Statement at the end of the CLR.

Where a candidate has not met the learning outcomes (either because of insufficient evidence or because you as tutor are aware of contra-indications[4]) this must be recorded on the Completion Statement at the final assessment. All possible steps should be taken to give candidates prior warning of any concerns likely to affect the final internal assessment decision. These concerns should clearly relate to specific learning outcome(s) and be documented (e.g. in tutorial records) alongside any agreed actions or support offered.

> **Tip:**
>
> It is important to emphasise to candidates at the beginning of the course that simply presenting evidence to meet assessment criteria may not be sufficient to meet the overall learning outcomes and/or qualification requirements. Candidates will need to participate in the practical and experiential elements of the course, and demonstrate ethical practice, to enable the tutor to confirm their overall competence without any contraindications.

The IA must record one of the following final outcomes:

1. **Proficient (P):** the candidate has met all the assessment criteria, achieved all 7 learning outcomes and has met all the qualification requirements.

---

[4] Substantive evidence which you have observed as tutor which indicates that a specific assessment criterion or learning outcome has not been met despite the evidence submitted by the candidate.

Qualifications that change lives cpcab

2. **Not Proficient (NP)**[5]: the candidate has **not** met the assessment criteria and/or has **not** achieved the 7 learning outcomes and/or has **not** met all the qualification requirements. Or contra-indications have been indicated.

3. **Left course:** the candidate left the course before completing internal assessment.

4. **Deceased:** the candidate died before completing the course.

5. **Deferred (D):** the candidate is being supported to complete internal assessment but has not yet met all the qualification requirements. Reasons might include incomplete portfolio work, or work to address contra-indications.

Centres may make explicit appropriate arrangements with candidates who have been **Deferred** to complete the qualification within a clear time frame. It is expected that candidates will complete within three months beyond the end of the course.

If a candidate is likely to exceed this then the tutor must complete the [Extension Request for Candidates (CR11)](#) form for candidates and send it to CPCAB before the three months have expired to request permission from CPCAB for a further extension:

All requests must be sent to exams@cpcab.co.uk

It is important that centres ensure they submit accurate results. Premature claim of certification, before all qualification requirements are met, is considered centre malpractice.

Alternative arrangements

If any circumstances arise where the approved tutor(s) is unable to sign off the IA for a candidate, the centre must seek formal CPCAB approval for alternative arrangements in order to ensure that these meet CPCAB requirements for valid internal assessment.[6]

7. Independent Verification

The candidate portfolios are **internally assessed and moderated**. Once internal assessment and moderation has been carried out, please provide CPCAB with the below documents for independent verification:

• A sample of Candidate 'Practice Reviews' from the group

• Completed [Candidate 'Practice Review' Cover sheet](#)

• Completed [Independent Verification Declaration for OPCP-L5](#)

• [Candidate Evaluations](#) of the course

---

[5]   Candidates must have access to centre internal appeals procedures if they wish to contest an internal assessment decision.
[6]   This is particularly important in situations arising from complaints against internal assessment or breakdown in relationship between candidate and tutors.

Qualifications that change lives   cpcab

- Internal Moderation report for the group

Please email all documents to verification@cpcab.co.uk. Failure to include ALL documents will result in a delay in Independent Verification and certification.

Please see Independent Verification Centre Guide for OPCP-L5 for further information.

The sample should consist of 30% of Practice Reviews from the group, or four Practice Reviews, whichever is the greater number. Please supply a range of abilities.

CPCAB will verify your assessment by independently verifying the Practice Reviews to ensure the learning outcomes have been evidenced and that tutor assessment is consistent, accurate and fair. Written feedback and any action considered necessary to fulfil the assessment requirements will be sent to the centre.

Certification:

CPCAB certificates successful candidates upon receipt of internal assessment results and completion of independent verification.

8. Internal Moderation, Verification, and Internal Quality Assurance (IQA)

For each group you teach an internal moderator must sample and confirm your assessments for this qualification. Internal Moderation reports are required to be sent to CPCAB along with a sample of candidate Practice Reviews for Independent Verification.

During each teaching year an internal verifier/internal quality assurer must also verify that the centre's programmes are properly in place and operating effectively. Centres should ensure that their IQA processes are sufficient to support tutors to assess at the correct level, across groups, and over time. CPCAB's External Verifiers will review a centres IQA processes as part of ongoing quality assurance. Please contact your programme coordinator to find out what procedures operate at your centre.

> ➢ See the Guide to Internal Moderation, Internal Verification and Internal Quality Assurance for Centres.

Qualifications that change lives cpcab

9. Annual Practising Certificate (APC)

When a centre first registers with CPCAB they will receive initial approval to run for one year. In order to meet the requirements of its regulators[7], to comply with UK law and to protect the interests of candidates CPCAB is obliged to obtain a further declaration of compliance from each of its recognised centres **every year**. This declaration is also intended to confirm that the information provided to CPCAB at the time of the centre's first approval remains accurate and up to date.

It must be signed by the person responsible for the quality assurance and management of CPCAB qualifications within the centre via the CPCAB portal at the beginning of each academic year. Once signed the portal will automatically generate your Annual Practising Certificate (APC) for the current academic year. This declaration will be requested before the first registration is made and may delay further registrations if not completed.

An APC can be withheld:

- Until the annual declaration of compliance has been signed.
- Following an external verification visit to the centre if any serious concerns are identified. The APC will be withheld until these concerns have been rectified. CPCAB will offer appropriate support.

CPCAB reserves the right to refuse to register any further candidates or to delay candidate certification for qualifications where serious concerns have been identified. Failure to respond to the support offered – and/or address areas identified as needing development – may lead to deregistration. De-registration may also result if a centre is involved in malpractice.

➢ Please view our policies on Sanctions, Malpractice & Maladministration, and Whistleblowing on the CPCAB Website.

10. Equal Opportunities and Reasonable Adjustments

In order to make sure that assessment is fair to all candidates, CPCAB requires all recognised centres to have an appropriate candidate support system in place and to make appropriate arrangements to meet individual assessment needs. As a centre you are required to identify individual candidate assessment needs prior to enrolment in order to make arrangements for reasonable adjustments. Reasonable Adjustments in respect of Internal Assessment are provided by the centre.

Please see CPCAB's Reasonable Adjustment Guidance for Centres.

---

[7]   Ofqual in England, Qualifications Wales in Wales and CCEA Regulation in Northern Ireland

Qualifications that change lives   cpcab

All individual assessment needs should be arranged by the centre, but the candidate's work must:

- Meet the requirements of the qualification specifications.
- Be assessable in a way that allows the assessment to be moderated and verified.

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.

Please see CPCAB's Equal Opportunities Policy.

11. 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, Sanctions, Malpractice & Maladministration, 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.

12. Tutor 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 each course delivery. Please click on this link to access the survey - Tutor feedback.

Qualifications that change lives   cpcab

Appendix 1: OPCP-L5 Learning Outcomes, Assessment Criteria and Guidance for Tutors

OPCP-L5		
LEARNING OUTCOME:	1. Work safely, legally and ethically as an online and phone counsellor	
Assessment criteria	**Candidate guidance to criteria**	**Notes for tutors (guidance only)**
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 ❖ Demonstrate establishing a client/counsellor agreement/contract appropriate to online and phone counselling.	❖ **Study** in detail a range of frameworks for working online and by phone. For example: o BACP Working online in the counselling professions Fact Sheet UKCP Guidelines for Working Online/Remotely o ACTO competencies for online therapy ❖ Use **group work** to discuss the ethical and legal implications for both online and phone counselling work in the UK and how this differs from international work. ❖ Use **group work** to discuss responsibilities around digital skills and digital footprints when working online and by phone. ❖ **Assess via: Learning review, Practice Review.**
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.	❖ Use **group training supervision** and **case scenarios** and/or real-life situations to discuss candidates' own limits of competence related to online and phone counselling and referral/signposting options. ❖ Use **skills practice** and **role play scenarios** for referral and signposting clients to alternative sources of counselling or support. ❖ **Assess via: Learning review, Practice Review, tutor observations and peer feedback.**

Qualifications that change lives cpcab

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) ❖ Demonstrate ethical responses to ethical challenges and dilemmas and challenges in online and phone counselling work.	❖ Use **group work** to discuss **case scenarios** for ethical challenges and dilemmas, such as; Dilemma: Online working and social media etiquette (BACP) ❖ Use **skills practice** and **role play scenarios** to practice responses to ethical dilemmas and challenges in online and phone counselling. ❖ **Assess via: Learning review, Practice Review, tutor observations and peer feedback.**
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.	❖ Use **group work** to discuss the management of data in online and phone counselling in keeping with current legislation. ❖ Use **skills practice** to demonstrate the application of this legislation to counselling work. ❖ Use **group work** and **case scenarios** to discuss a range of confidentiality issues. ❖ **Assess via: tutor observations, learning review and peer feedback.**
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 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. ❖	❖ Use **group work** to discuss a range of situations with a potential risk (to client and/or counsellor). For example, psychotherapy.net considers whether high-risk clients are suitable for online psychotherapy ❖ Use **skills practice** and **role play scenarios** for assessing client needs and risks while occupying separate spaces. ❖ Use **group training supervision** to discuss how risk assessments are conducted and how practitioners can respond appropriately to the risks. ❖ ❖ **Assess via: Learning review, Practice Review, tutor observations and peer feedback.**
LEARNING OUTCOME:	2. Work with complex aspects of the online and phone counselling relationship	
Assessment criteria	**Candidate guidance to criteria**	**Notes for tutor (guidance only)**

Qualifications that change lives   cpcab

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: o The Online Therapeutic Relationship (UEL) o Online relationship counselling (BACP) o 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.	❖ Use **group work** to discuss relevant research on the virtual therapeutic relationship. ❖ Use **skills practice** to facilitate opportunities for candidates to practise developing a therapeutic relationship in online and phone mediums. ❖ **Assess via: Learning review, Practice Review, tutor observations and peer feedback.**
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: o Maintaining boundaries when working online (ACTO) o 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.	❖ Use **group work** to discuss aspects of the boundaries of the virtual counsellor role, together with examples of how they can be tested by the client. ❖ Use **skills practice** to provide opportunities for candidates to practise managing boundary challenges in online and phone settings, e.g., people in the background etc. ❖ Use **group work** discuss features of the 'therapeutic frame' within the context of online and phone counselling. ❖ **Assess via: Learning review, Practice Review, tutor observations and peer feedback.**

Qualifications that change lives cpcab

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) to develop awareness. ❖ Demonstrate how you work empathically and without judgement with fantasy and disinhibition throughout the therapeutic relationship.	❖ Use **group work** and **case scenarios** to discuss a range of influences on the online and phone therapeutic relationship. ❖ Use **group training supervision** to use a learning tool, for example Interpersonal Process Recall (IPR) to identify non-verbal communication, virtual connectivity, disinhibition, emotional containment, fantasy and assumptions etc. in an online and phone counselling session. ❖ Use **group training supervision** to explore ways in which the counsellor might use technology to avoid discussing a particular subject and how technology might assist the counsellor to work effectively with implicit material. ❖ Use **skills practice** with **role play scenarios** for practice working with disinhibition in the client and counsellor. ❖ **Assess via: Learning review, Practice Review, tutor observations and peer feedback.**
LEARNING OUTCOME:	3. Work with difference and diversity in online and phone practice	
Assessment criteria	**Candidate guidance to criteria**	**Notes for tutor (guidance only)**
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. ❖ Reflect on the strengths and areas for development in your approach to working with diverse communities.	❖ Consider the use of resources such as 'Race is complicated: A toolkit for psychological therapies training' when preparing candidates to explore diversity issues ❖ Use **group work** to discuss diversity issues for online and phone counselling including cultural competence; racial bias. ❖ Use **group training supervision** and case scenarios to explore scenarios representing diversity issues including cultural competence; racial bias. ❖ Use **group training supervision** goldfish bowl activities to identify empathic resonance in online or phone counselling work. ❖ Use **skills practice** and **role play scenarios** for practise working sensitively with client diversity. ❖ **Assess via: Learning review, Practice Review, tutor observations and peer feedback.**

Qualifications that change lives cpcab

Assessment criteria	Candidate guidance to criteria	Notes for tutor (guidance only)
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.	❖ Use **group work** to discuss barriers to accessing online and phone counselling including language; disability; socioeconomic status; digital skills; privacy and confidentiality concerns. ❖ Use **group training supervision** and **case scenarios** to find effective solutions to accessing online and phone counselling. ❖ Use **skills practice and role play scenarios** for working with widening barriers to access for clients. ❖ **Assess via: Learning review, Practice Review, tutor observations and peer feedback.**
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.	❖ Use **group training supervision** to explore ways in which technology might assist the counsellor in conveying their acceptance of the client. ❖ Use **group training supervision** and **case scenarios** and/or real-life situations to discuss candidates' ability to empathise. ❖ Use **skills practice** to demonstrate an understanding of the client's reality while counsellor and client occupy separate physical spaces. ❖ Use **group work** to introduce scenarios that challenge the values and attitudes of the group. ❖ **Assess via learning reviews, tutor observations and peer feedback.**
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**	**Notes for tutor (guidance only)**

Qualifications that change lives   cpcab

Assessment criteria	Candidate guidance to criteria	Notes for tutor (guidance only)
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. ❖ Demonstrate conducting client assessments in online and phone counselling.	❖ Use **group work** to discuss the use of online client feedback tools to support initial and ongoing assessment E.g. Norse Feedback /core IMS ❖ Use **group training supervision** to discuss the role of assessment and the need for coherence when assessing clients for online/phone counselling work. ❖ Use **skills practice** and **role play scenarios** for practicing client assessment of needs and risks consistent with online and phone counselling work. ❖ **Assess via: Learning review, Practice Review, tutor observations and peer feedback.**
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.	❖ Use **group training supervision** to discuss how to agree a collaborative working agreement that is based on the client's needs, but which also takes account of the mode of counselling being offered, agency policies, resources and provision. ❖ Use **skills practice** and **role play scenarios** for establishing a client/counsellor agreement/contract appropriate to online and phone counselling. ❖ **Assess via: Learning review, Practice Review, tutor observations and peer feedback.**
4.3 Review and respond to the changing needs of the client in online and phone counselling.	❖ 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.	❖ Use **skills practice** and **role play scenarios** for practicing reviewing and responding to changing client needs in online and phone counselling. ❖ Use **group work** to explore the role and importance of review in online and phone counselling practice. ❖ **Assess via: Learning review, Practice Review, tutor observations and peer feedback.**
LEARNING OUTCOME:	5. Work with self-awareness as an online and phone practitioner	
Assessment criteria	Candidate guidance to criteria	Notes for tutor (guidance only)

Qualifications that change lives cpcab

Assessment criteria	Candidate guidance to criteria	Notes for tutor (guidance only)
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.	❖ Use **group work** to facilitate self-awareness around capacity for meaningful connections in an online and phone setting. ❖ Use **group training supervision** to discuss experiences of online connection. ❖ **Assess via: Learning review, Practice Review.**
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.	❖ Use **group training supervision** to discuss the risks of lone working in counselling work. For example, BACP offer support for lone workers in keeping themselves safe and BACP members can access Working online in the counselling professions GPiA 125 ❖ Use **skills practice** and **role play scenarios** in to work to work with a range of lone working situations in online and or phone counselling which involve an element of risk. ❖ Refer to (for example) general guidance on lone working offered by NCPS ❖ **Assess via: Learning review, Practice Review, tutor observations and peer feedback.**
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.	❖ Use **group work exercises** to facilitate awareness of self-care and wellbeing in online and phone counselling work. ❖ Use **tutorials** to establish individual plans for self-care and wellbeing. ❖ **Assess via: Learning review, Practice Review, tutorial record.**
LEARNING OUTCOME:	6. Use theory, research and skills within a coherent framework for online and phone counselling practice	
Assessment criteria	**Candidate guidance to criteria**	**Notes for tutor (guidance only)**
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.	❖ Use **group work** to discuss working online or by phone using a range of modalities (e.g., person centred, gestalt, CBT, psychodynamic, or an integrative approach). ❖ Use **skills practice** to observe the effective application of a given modality to online and phone counselling. ❖ **Assess via: Learning review, Practice Review, tutor observations and peer feedback.**

Qualifications that change lives cpcab

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.	❖ Use **group training supervision** to use for example, the Interpersonal Process Recall model to develop candidates' perceptions and awareness. ❖ Use **skills practice** to demonstrate the effective use of skills and techniques in online and phone counselling. ❖ **Assess via: Learning review, Practice Review, tutor observations and peer feedback.**

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.
		❖ Use **group work** to discuss research findings on therapists' experiences of working online and by phone. E.g.,
		  o What do we know about online therapy?
		  o Video counselling and psychotherapy: A critical commentary on the evidence base
		❖ Use **tutorials** to review research findings and own experience of online and phone counselling.
		❖ **Assess via: Learning review, Practice Review, tutorial record.**

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**	**Notes for tutor (guidance only)**
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.	❖ Use **skills practice to** gain observation feedback and self- review of effectiveness of online and phone counselling skills. ❖ Use **tutorials** to evaluate feedback on the effectiveness of online and phone counselling practice. ❖ **Assess via: Learning review, Practice Review, tutor observations and peer feedback, tutorial record.**
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.	❖ Use **group work** exercise such as for example, Creately or Mural to collaborate and share reflective practice ideas and create plans for ongoing professional development. ❖ Use **tutorials** to review plans for ongoing professional development. ❖ **Assess via: Learning review, Practice Review, tutor observations and peer feedback, tutorial record.**

Qualifications that change lives cpcab

Appendix 2: Example Completion Statement for OPCP-L5

Completion statement for Candidate Learning Record
Level 5 Award in Online and Phone Counselling Practice (OPCP-L5)

Learning outcome		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 <u>not</u> 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 tutor 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: ....

Qualifications that change lives cpcab

Appendix 3: Independent Verification Candidate Practice Review Cover Sheet for OPCP-L5

This form is to be completed by the candidate and tutor.

Please submit this with the candidate Practice Review samples sent to CPCAB for Independent Verification to support the assessment and quality assurance of this candidate's work.

Failure to provide ALL this information will delay the Independent Verification and certification of the group.

Centre name and number:	Candidate number:

I confirm that I have personally completed this Practice Review and that it is a true and accurate record of my own work.

Candidate name:

Candidate signature: Date:

I confirm that this Practice Review is the candidate's own work.

Tutor name:

Signature: Date:

External Quality Assurance

CPCAB Independent Verification

Independent Verifier name:

Signed (on behalf of CPCAB Head Office):   Date:

Qualifications that change lives cpcab

Appendix 4: Independent Verification Declaration for OPCP-L5

This form is to be completed by the tutor. Please email all documentation to verification@cpcab.co.uk

Please provide the following documentation to support the assessment of this candidate group. **Failure to provide ALL this information will delay the Independent Verification and certification of the group.** Please use this table as a checklist to ensure that you have provided all the relevant documents for Independent Verification.

Centre name:		Centre number:
Tutor name and e-mail address:		
CPCAB group number:		
Number of Practice Reviews submitted for Independent Verification:		
Internal Quality Assurance		
Name of Internal Moderator:		
How many Practice Reviews have been Internally Moderated from this group?		
Name of Internal Verifier:		
Has Internal Verification taken place for this cohort?	Yes/No	
Have the Internal Assessment results been uploaded to the CPCAB portal? portal.cpcab.co.uk	Yes/No	
Please ensure you include the following with the candidate Practice Reviews:		**Please mark**
Sample of candidate Practice Reviews [8]		
Signed candidate Practice Review cover sheets		
Independent Verification Declaration		
All candidate evaluations of the course		
Internal Moderators' report		

Signed (on behalf of the centre): Position:

Name (please print): Date:

---

[8] The sample should consist of 30% or four practice reviews, whichever is the greater number. If a group falls below the minimum number of 6 candidates, then all portfolios will need to be emailed to CPCAB for Independent Verification - Please supply a range of abilities.

Qualifications that change lives cpcab

Appendix 5: Candidate Evaluation Form

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 two 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						

Qualifications that change lives cpcab