

Online and phone therapy (OPT) training curriculum

A curriculum for delivering online
and phone therapy training





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Updates were made in August 2026 to align content relating to risk assessment and management with contemporary research.

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Contents

Introduction	5
Rationale	6
Overall aim of the curriculum	7
Curriculum structure	7
Option 1: Core OPT training	7
Option 2: Extended OPT training	7
Option 3: Top-up OPT training	7
Option 4: CPD	7
Course entry requirements	8
Option 1: Core OPT training	8
Option 2: Extended OPT training	8
Option 3: Top-up OPT training	8
Option 4: CPD	8
Additional entry requirements for all OPT training options	9
Delivering OPT as part of a core practitioner training programme	9
Curriculum delivery	10
OPT placements/practice	12
An example session	12
Assessment framework	13
Overview of the OPT training curriculum	14
Option 1: Core OPT training:	15
Subject area 1: OPT media and technology	16
Subject area 2: The scope of OPT working	17
Subject area 3: Ethical and professional practice	18
Subject area 4: Confidentiality and data protection	19
Subject area 5: Facilitation of OPT sessions	20
Subject area 6: Risk	22
Subject area 7: Equality, diversity, and inclusion	23
Subject area 8: Communication and therapeutic skills	24
Subject area 9: Working with psychological processes	26
Subject area 10: Self-care	27
Subject area 11: Supervision	28
Option 2: Extended OPT training:	29
Subject area 1: OPT media and technology	30
Subject area 2: The scope of OPT working	31
Subject area 3: Ethical and professional practice	33
Subject area 4: Confidentiality and data protection	34
Subject area 5: Facilitation of OPT sessions	36
Subject area 6: Risk	38
Subject area 7: Equality, diversity, and inclusion	40
Subject area 8: Communication and therapeutic skills	41

Contents continued.

Subject area 9: Working with psychological processes	43
Subject area 10: Self-care	44
Subject area 11: Supervision	45
Subject area 12: Working internationally (For extended OPT training or top-up training only)	46
Option 3: Top-up OPT training:	47
Subject area 1: OPT media and technology	48
Subject area 2: The scope of OPT working	49
Subject area 3: Ethical and professional practice	50
Subject area 4: Confidentiality and data protection	51
Subject area 5: Facilitation of OPT sessions	52
Subject area 6: Risk	53
Subject area 7: Equality, diversity, and inclusion	54
Subject area 8: Communication and therapeutic skills	55
Subject area 9: Working with psychological processes	56
Subject area 10: Self-care	57
Subject area 11: Supervision	58
Subject area 12: Working internationally (For extended OPT training or top-up training only)	59
Reading list and resources	60
Reading List	61
Further BACP Good Practice in Action resources	63
Appendix A: Suggested student feedback questionnaire	64

Introduction



Rationale

In 2020, the BACP (2016) Telephone and e-counselling competence framework was reviewed and updated to reflect the presence and position of remote therapy in the professional landscape and in society more broadly. The 2016 competence framework was based on the findings of a systematic literature review, completed in 2013, which was analysed to identify core themes and extract competences. This curriculum and the current Online and phone therapy (OPT) competence framework are informed by the 2013 review; however, the material has been re-examined, reflected on and developed by an Expert Reference Group (ERG) recruited by BACP to bring expertise and experience in contemporary OPT practice. The OPT competence framework can be downloaded here: <https://www.bacp.co.uk/events-and-resources/ethics-and-standards/competences-and-curricula/online-and-phone-therapy/>

Therefore, this training curriculum replaces the 2016 version, which was developed to support the BACP Telephone and e-counselling competence framework.

In relation to this curriculum, online and phone therapy (OPT) can be defined as:

Counselling or psychotherapy practice that relies on technologically mediated applications and processes for some or all its delivery. This may involve the use of phones (traditional or smart), tablets or any kind of computer (desktop, laptop etc.) with an internet connection. These enable interactions to take place remotely, implying that practitioner and client will not share the same physical space. Some of the administrative communication between the two parties may be asynchronous. Technologically mediated communication may be the foundation for either a part or all of the therapeutic work.

The number of practitioners delivering therapy in ways that are mediated by technology has been growing for some time, and the Covid-19 pandemic resulted in the majority of practitioners using some form of distance-based mediated approach in order to maintain their client work during lockdown restrictions.

The ongoing growth in the use of digital devices has changed the face of mobile communication. In particular, the growth and availability of video-based communications have significantly impacted on both practitioners' skills and their attitudes to the delivery of remote therapy.

It is important to recognise that, due to the speed of evolution of information technology, any published guidance in this area can and will reflect only a specific moment in time. Practitioners will need to engage in regular exploration and assessment of technological innovations and their potential impact as the world of information technology evolves. It is therefore the responsibility of the practitioner to continually update their practice alongside and in connection with this curriculum, the OPT competences in the framework and the information within the accompanying user guide.

Course trainers and students are encouraged to make reference to BACP's Good Practice in Action (GPiA) resources, in particular:

- GPiA 040, Commonly asked questions: Social media
- GPiA 047, Fact sheet: Working online
- GPiA 123, Research overview: Digital Technology (publication due in September 2021).

The Good Practice in Action resources are available to BACP members and can be found at: <https://www.bacp.co.uk/gpia/>

Additional Good Practice in Action resources that may be useful to trainers and students can be accessed via the weblink above, some of which are listed in the reading list at the end of this curriculum.

BACP's guidance on the use of social media will also be useful to trainers and students: <https://www.bacp.co.uk/membership/membership-policies/social-media/>

It is also recommended that this curriculum is used alongside BACP's Ethical Framework for the Counselling Professions, which can be found at: <https://www.bacp.co.uk/events-and-resources/ethics-and-standards/ethical-framework-for-the-counselling-professions/>

Overall aim of the curriculum

The aim of BACP's Online and phone therapy (OPT) training curriculum is to enable counselling students and qualified practitioners to gain knowledge of and competence in OPT with adults in order to practise remotely in an ethical and effective way. This training curriculum is aimed at training providers who wish to deliver training for OPT.

Curriculum structure

The curriculum can be delivered in different ways:

1. **Core OPT training**
2. **Extended OPT training**
3. **Top-up OPT training**
4. **CPD – individual elements of the content for extended OPT training for CPD.**

Option 1: Core OPT training

The core elements of the OPT curriculum give students and practitioners the necessary skills and knowledge to begin working with adults using OPT.

Core OPT training has 11 subject areas, and it is suitable for:

- Trainee practitioners on core training that includes some remote supervised placement hours
- Qualified practitioners who wish to complete OPT training to enable them to work nationally using video and phone mediated technologies.

Option 2: Extended OPT training

Extended OPT training includes all of the elements in the core OPT training plus additional extended content and learning outcomes.

The extended OPT training has 12 subject areas and it is suitable for qualified practitioners who are seeking a broader OPT training, which includes a wider range of technology assisted media, competence for international working and text-based, asynchronous therapy.

Option 3: Top-up OPT training

The extended content and learning outcomes can be delivered in isolation as top-up training. This option is suitable for:

- Qualified practitioners who have already completed core OPT training, or can evidence via a formalised APL procedure that they have equivalent prior knowledge and skills of working using online and phone media.

Option 4: CPD

Different elements of this curriculum can be delivered as CPD to address gaps in OPT knowledge, skills and competence to support the ongoing development of post-qualified practitioners.

Course entry requirements

The curriculum is designed to be flexible to meet the varied needs of different training providers, students and practitioners with a range of past OPT experience and/or previous OPT training. Therefore, each of the options for delivery of the curriculum has slightly different entry criteria.

Option 1: Core OPT training

- Qualified counselling/psychotherapy practitioner with a minimum of level 4 diploma [Regulated Qualifications Framework (RQF) England, Wales and Northern Ireland] and level 7 [The Scottish Credit and Qualifications Framework (SCQF) Scotland] or equivalent, which included a minimum of 400 hours of direct tutor contact time and 100 hours supervised counselling/psychotherapy practice in line with recognised practitioner training, or,
- Currently studying for an adult-focused counselling/psychotherapy qualification (course requirements as above)

Option 2: Extended OPT training

- Qualified counselling/psychotherapy practitioner with a minimum of level 4 diploma [Regulated Qualifications Framework (RQF) England, Wales and Northern Ireland] and level 7 [The Scottish Credit and Qualifications Framework (SCQF) Scotland] or equivalent, which included a minimum of 400 hours of direct tutor contact time and 100 hours supervised counselling/psychotherapy practice in line with recognised practitioner training

Option 3: Top-up OPT training

- Qualified counselling/psychotherapy practitioner with a minimum of level 4 diploma [Regulated Qualifications Framework (RQF) England, Wales and Northern Ireland] and level 7 [The Scottish Credit and Qualifications Framework (SCQF) Scotland] or equivalent, which included a minimum of 400 hours of direct tutor contact time and 100 hours supervised counselling/psychotherapy practice in line with recognised practitioner training
- Has already completed core OPT training or,
- Can evidence via a formalised APL procedure knowledge, skills and OPT experience that is equivalent to the elements within the core OPT training

Option 4: CPD

- Qualified counselling/psychotherapy practitioner with a minimum of level 4 diploma [Regulated Qualifications Framework (RQF) England, Wales and Northern Ireland] and level 7 [The Scottish Credit and Qualifications Framework (SCQF) Scotland] or equivalent, which included a minimum of 400 hours of direct tutor contact time and 100 hours supervised counselling/psychotherapy practice in line with recognised practitioner training
- Has already completed core OPT training or its equivalent

Additional entry requirements for all OPT training options:

- Member of a counselling/psychotherapy professional body (e.g. BACP)
- Owns or has access to computer/laptop/tablet with good broadband connection and internet security
- An understanding of the legal and ethical considerations for ensuring confidentiality and privacy and of the data protocol that needs to be followed
- Owns or has access to designated landline or mobile phone
- Has access to a private, uninterrupted space in which to attend online training and deliver confidential OPT sessions

Delivering OPT as part of a core practitioner training programme

When delivering OPT as part of a core practitioner counselling/psychotherapy course, students must be taught and assessed in the content and learning outcomes within the Core OPT training (Option 1).

Before starting remote client work, students must be assessed individually for their readiness to begin working with clients using online or phone-mediated technology.

Due to the particular legislative, insurance, and safeguarding considerations for international practice, students on core practitioner training should only work with UK-based clients.

Further information about BACP's requirements for delivering OPT as part of a core practitioner training course, can be accessed here:

For accredited courses: BACP course accreditation criteria - 2009 Scheme, 6th edition (amended in 2021 to include online teaching delivery and remote placements) <https://www.bacp.co.uk/membership/organisational-membership/course-accreditation/>

For all other core practitioner training courses: BACP guidance for online teaching delivery and remote supervised placements www.bacp.co.uk/online-teaching-guidance

Curriculum delivery

Practitioners who provide OPT need to ensure they are working within their competence (See BACP's Ethical Framework for the Counselling Professions (2018), Good Practice; Working to professional standards, point 13.)

In addition, the following points are pertinent to the delivery of this curriculum:

1. The teaching team will be counselling practitioners with current or past experience of providing both face-to-face (in-the-room) counselling and OPT. Trainers will be experienced and competent with these modes of working. They must also be competent in delivering experiential learning online. Courses may bring in specific expertise to teach different elements of the OPT training where there are gaps in knowledge within the teaching team. Courses are responsible for assessing students' competence for OPT working throughout the course and before beginning OPT practice
2. The course must have OPT appropriate data protection policies and procedures
3. Students will need a private space to attend online training sessions and to deliver OPT sessions if remote client work at the student's home is required/allowed
4. For online teaching delivery:
 - The course must have the appropriate technology, software and IT support for online teaching delivery to take place without unnecessary interruption
 - There must be adequate data security in place
5. The course must have a policy for online teaching that includes:
 - Student attendance (e.g. fully present with camera on, mute/unmute microphones etc.)
 - Student 'netiquette' (e.g. not engaging in private text-based communication with peers during taught sessions, microphone on mute etc.)
6. As with the counselling process, which the course should model, adequate time should be given at the outset for contracting as a group as well as familiarisation and bonding. A range of ice breakers and other creative materials can be used to this effect. This can be especially beneficial to acknowledge the differences between working creatively within OPT and in-the-room teaching and learning
7. While specific issues, such as working with difference, working ethically and working safely in OPT have specific references within the subject areas, it is expected that they will permeate throughout the course curriculum, since they are connected to values which underpin all training and practice
8. Trainers need to familiarise themselves with BACP's Online and phone therapy (OPT) competence framework before delivering the training
9. It is expected that the course will include a wide range of teaching styles and as much experiential work as possible during both face-to-face (in-the-room) and remote training sessions
10. The delivery of this training curriculum should be underpinned by adult learning theories, which use experiential and reflective learning approaches (e.g. Experiential Learning Cycle (Kolb, 1984); The Reflective Cycle (Gibbs, 1988); ALACT (Korthagen and Vasalos, 2010))
11. Although there are 12 subject areas across the whole of this curriculum, it is important to note that one subject area does not necessarily equate to one day of course delivery. In addition, the subject areas are not intended to sit as separate units/modules that need to be delivered in any particular linear/sequential format. Many subject areas interlink, and some underpin all elements of the course e.g. Subject area 3: Ethical and professional practice
12. Each subject area is supported by references to the relevant competences contained within the Online and phone therapy (OPT) competence framework. These references are included so that tutors and students can develop familiarity with the competences and focus on specific areas of learning and development in relation to practice

13. The listed contents for each subject area are not intended to become a check list of competences for students to achieve, as this could potentially undermine any relational, experiential and reflective aspects of the learning experience
14. In the interest of ethical experiential skills' practice and reflective training, it is important that the sessions are delivered in a time frame that allows for processing of knowledge and to allow the experience of practice to complement the learning. However, course timings can be adapted to suit the training provider
15. It is suggested that an average learning session lasts for one day of six to seven hours with appropriate breaks. This session length can also be increased/decreased at the training provider's discretion so as to meet the requirements of their institution and/or awarding body
16. Courses must ensure a minimum of 80% attendance, and 100% of the subject areas and course assessments must be successfully completed. Thus, any sessions missed must be completed by the student accordingly
17. Whilst flexible in terms of structural delivery, there is little flexibility in terms of the learning outcomes because these are mapped onto, and underpinned by BACP's evidence-informed competences for OPT
18. Each session should include face-to-face (in-the-room) and/or OPT practice sessions, facilitated by the trainer(s) and working in pairs or in triads to make use of observation and feedback skills. Students should be encouraged to reflect on their practice, both in the room and remotely, and to consider both the differences and similarities between each approach. It may be useful to record some of the OPT skills practice sessions to further enable students to reflect on their own skills' practice and process, and thereby develop critical self-evaluation and awareness
19. All students should be encouraged to be reflective practitioners. This can be helped by the use of reflective journals or portfolios, which should include for example, any visual material created during sessions. Assessment should include an element of personal reflection
20. All students should be encouraged to be active researchers. This might include working together on a topic to be presented to the wider group or producing well-documented and referenced assignments. It could also involve action research and lead to students becoming more interested in themselves as reflexive and research active practitioners. Students should be encouraged to engage with the OPT research literature in order to maintain the currency of practice
21. It is expected that appropriate therapeutic resources and tools will be available to students so that experiential learning is enabled during their training
22. This OPT training curriculum is designed to be delivered across all four nations of the United Kingdom and as such can be delivered through Higher Education (HE), Further Education (FE) and by private training providers. Different training establishments have differing qualification, assessment and validation requirements to fulfil. Thus, training providers will have to adapt the learning outcomes to meet their qualification requirements
23. After successful completion of the whole course, it is the counselling practitioner's responsibility to maintain appropriate and relevant OPT CPD
24. Course trainers should refer to the Good practice sections of BACP's Ethical Framework for the Counselling Professions (2018), in particular Supervision, points 60–73, and Training and education, points 74–80.

OPT placements/practice

Students who are being taught the Core OPT training elements of the curriculum as part of their core training will need a supervised placement in which they can conduct OPT sessions. Please see one of the following documents for further guidance on OPT supervised placements:

- For accredited courses: BACP course accreditation criteria - 2009 Scheme, 6th edition (amended in 2021 to include online teaching delivery and remote placements) <https://www.bacp.co.uk/membership/organisational-membership/course-accreditation/>
- For all other core practitioner training courses: BACP guidance for delivering OPT in core training www.bacp.co.uk/online-teaching-guidance

Qualified practitioners who are being taught the core, extended or top-up elements of the curriculum will either need a placement or work setting to conduct OPT sessions, or private OPT clients.

This curriculum does not stipulate the number of OPT practice hours needed for assessment of OPT competence. It is the course's responsibility to set the number of OPT practice hours they require to determine competence.

Supervision

All students will need appropriate supervision with a supervisor who has knowledge of, and experience in, delivering OPT sessions. Supervisor's competence should be aligned with the BACP Supervision competence framework, which includes the OPT supervision competences: <https://www.bacp.co.uk/events-and-resources/ethics-and-standards/competences-and-curricula/supervision-curriculum/>

The mode of supervision should mirror the mode of delivery used in OPT sessions e.g. phone therapy – phone supervision; online (video) therapy – online (video) supervision.

An example session

A typical session will either take place in the classroom or remotely using live, synchronous technology e.g. on a video platform.

A typical session* might reflect the following format:

09.30–10.00

Group session to bring the group together either for the first time or since the last session

10.00–12.30

Didactic teaching of specific subject area(s)

12.30–13.30

Lunch

13.30–14.30

Group experiential and reflective work (including discussion on the taught material, the student's personal responses to it and how it relates to ethical and professional practice e.g. BACP's Ethical Framework for the Counselling Professions)

14.30–16.00

OPT skills' practice (with observation and feedback)

16.00–17.30

Working with case studies/group supervision sessions

* Please note this example is not intended to be prescriptive and session structure may differ across courses

Assessment framework

- There must be formative and summative assessment protocol throughout the course to ascertain the student practitioner's competence to practise OPT
- There should be regular assessment of students' OPT practice to evaluate their competence in integrating ethical practice into their way of working in relation to the ethical framework/code of practice to which the student is affiliated
- It is recognised that some elements of the subject areas may only be developed while working with clients in a placement/practice setting consisting of face-to-face 'in- the-room' and remote hours. As learning may be acquired in taught sessions, in the placement and/or in supervision, the methods of assessment need to be varied to reflect the different learning environments
- Summative assessments are essential to evaluate student competence against many of the learning outcomes. These assessments can be adapted to suit the requirements of the institution and/or awarding body, but in all cases they must reflect, and adequately evidence the learning outcomes. In particular, assessments must reflect and evaluate an understanding of the ethical framework/code of practice (pertaining to the individual practitioner), and the student's self-awareness and reflexivity
- Examples of summative assessments might include critically analysed essays; case studies; supervisor's report; placement report; skills' practice assessment; individual and group presentations; practice portfolio; evaluation of ethical decision-making in relation to practice; personal learning and development statement
- Formative assessments are encouraged throughout the course to monitor student learning and provide ongoing feedback that can be used by students to improve their learning/skills. Reflective journals may also be a useful way for students to reflect on their own process throughout the course
- Examples of formative assessment might include feedback on OPT skills' practice development; self and peer evaluation and assessment; feedback on the student's development of working in the room as well as remotely; individual or group presentations; reflective writing/journaling; tri-partite meetings; feedback on development of ethical and professional practice
- Course tutors may find that some of the learning outcomes are best assessed via an ongoing formative assessment procedure, and so a mix of summative and formative assessments would be acceptable. The examples of assessments given above are not exhaustive and there may be a number of other ways in which student work can be assessed.

Overview of the OPT training curriculum

The OPT curricula consist of 11 main subject areas:

1. OPT media and technology
2. The scope of OPT working
3. Ethical and professional practice
4. Confidentiality and data protection
5. Facilitation of OPT sessions
6. Risk
7. Equality, diversity, and inclusion
8. Communication and therapeutic skills
9. Working with psychological processes
10. Self-care
11. Supervision

For extended and top-up learning options, there is an additional subject area:

12. Working internationally

Core, extended, and top-up learning options have specific learning content for each subject area. The specific learning content for each learning option and subject area includes:

- An introduction
- Learning outcomes
- Essential content
- Associated competences

Option 1: Core OPT training



Subject area 1: OPT media and technology

Introduction

This subject area relates to identifying the different ways therapy can be facilitated remotely, alongside the associated technology. It refers to the device(s) and/or application(s) used to mediate communication and interaction in OPT, where the practitioner and client are based in different physical locations.

Learning outcomes

By the end of this subject area students will be able to:

- Demonstrate knowledge of a range of OPT media and associated technology and/or devices
- Critically evaluate own digital competence in terms of setting up and using technology and devices to effectively facilitate remote counselling sessions

Essential content

- Definitions of remote therapy and the different ways it can be facilitated, for example:
 - Visual and audio communication taking place at a distance (videoconference)
 - Purely audio cues from each party (phone)
 - Without visual or audio cues from each party (text only)
- Definitions of:
 - Synchronous communication: therapy conducted in real time e.g. video, platforms
 - Asynchronous communication: there is a time delay between responses e.g. email, SMS
- Setting up and securely managing the media being used for OPT
- The technical skills needed to effectively use the OPT media selected
- Knowledge of how different technology and media are set up and used
- How to troubleshoot common difficulties with media and technology
- Cyber and phone security
- Supporting clients to engage with OPT safely and securely

For more information about the OPT competences related to Subject area 1, please refer to the following sections of BACP's *Online and phone therapy (OPT) competence framework*:

1. ii and. iii

Subject area 2: The scope of OPT working

Introduction

This subject area relates to how OPT differs to face-to-face (in-the-room) counselling and how it can be offered to meet clients' current and changing needs.

Learning outcomes

By the end of this subject area students will be able to:

- Identify and use understanding of the differences between OPT and in-the-room therapy to inform the work
- Use knowledge of the nature of blended therapy to meet changing needs whilst working within own limits of ability

Essential content

- How OPT differs from in-the-room therapy
- How different media meet different client needs
- Potential limitations and challenges of not being physically present
- Differences in beginnings and endings e.g. lack of transitions
- Contracting differences
- Definition for blended therapy
- Different ways therapy can be blended e.g. phone and in the room, online and phone, online and in the room
- Reasons to offer blended therapy
- Safely moving from one medium or setting to another

For more information about the OPT competences related to Subject area 2, please refer to the following sections of BACP's *Online and phone therapy (OPT) competence framework*:

1. ix. 2. iii.

Subject area 3: Ethical and professional practice

Introduction

The aim of this subject area is to provide students with a sound working knowledge of the ethical, professional and legal frameworks and issues that are pertinent to OPT.

NB: This subject area is not intended to sit as a stand-alone module. The contents of this subject area underpin each of the other subject areas, and so issues relating to ethical and professional practice should be woven into all of the other taught sessions.

Learning outcomes

By the end of this subject area students will be able to:

- Demonstrate the ability to work within an ethical, professional and legal framework for OPT
- Demonstrate the ability to set up a secure OPT therapeutic frame and conduct therapeutic work effectively via the medium being offered and support the client to do the same
- Maintain professional standards with clients in all OPT communications, including text-based correspondence outside of OPT sessions
- How to establish an OPT therapeutic frame
- Providing an appropriate visual environment for OPT when there is visual contact
- Working in an appropriate location that is secure and confidential, and supporting the client to do the same
- Using private and secure technology and supporting the client to do the same
- Netiquette
- Maintaining professionalism in text-based communication that takes place outside of the actual OPT sessions e.g. arranging/changing session times, negotiating fee payment, contracting issues
- Maintaining professionalism and boundaries in all administrative contact with the client

For more information about the OPT competences related to Subject area 3, please refer to the following sections of BACP's *Online and phone therapy (OPT) competence framework*:

1. viii. 3. ii. iii. iv. and v.

Essential content

- Key principles that inform ethical practice and appropriate standards of conduct for OPT (with reference to BACP's current Ethical Framework)
- Relevant UK legislation (e.g. GDPR)
- Professional limits of ability and how to address gaps in competence
- Ways in which to establish client identity and establish appropriate anonymity around own identity
- Establish and maintain appropriate boundaries for OPT

Subject area 4: Confidentiality and data protection

Introduction

The aim of this subject area is to provide an overview of confidentiality, data protection, security and client and practitioner privacy in relation to OPT.

Learning outcomes

By the end of this subject area students will be able to:

- Demonstrate the ability to inform the client about limits to confidentiality and privacy issues when working remotely
- Demonstrate the ability to maintain client safety and confidentiality in relation to data protection, technology and data threats
- Demonstrate knowledge of how data protection and privacy apply to different media for OPT
- Demonstrate knowledge of and ability to work within agency/placement policies and procedures in relation to data security
- Demonstrate knowledge and understanding of how to manage and monitor own digital footprint and that of the clinical work
- Storing and processing client data e.g. client records
- Reporting data breaches
- Maintaining client confidentiality and privacy when working remotely
- Maintaining safety around data protection for all aspects of OPT and supporting clients to do the same
- Confidentiality and privacy issues in relation to different OPT media e.g. being overheard, internet search history, recording sessions, data leaks
- Privacy and safety in relation to possible client circumstances and vulnerabilities e.g. challenging home situation, unable to talk freely etc.
- Working within agency policies and procedures for data security
- Risks of using personal technology when working for an agency and/or in private practice
- Sharing client data with agency and/or others appropriately
- Using the counselling agencies media and technology
- What is meant by the term digital footprint e.g. the trail of data created while using the internet
- How students can manage their own digital footprint and that of their client work
- Practitioner's use of social networking and other online spaces
- Applying privacy settings and developing digital policies to manage practitioner's digital footprint
- Recording sessions: permissions and implications

Essential content

- Discussing and clarifying confidentiality limits and privacy issues with the client when working remotely
- Informing client about how their data will be stored and who they will be shared with e.g. agency
- Obtaining informed consent when working remotely. There should be a written record of the information that has been given to the client prior to requesting their consent to proceed
- GDPR legislation
- ICO requirements
- Legal requirements relating to confidentiality, privacy, consent and data protection in relation to OPT

For more information about the OPT competences related to Subject area 4, please refer to the following sections of BACP's *Online and phone therapy (OPT) competence framework*:

4. i. and ii. 10. viii.

Subject area 5: Facilitation of OPT sessions

Introduction

The aim of this subject area is to give an overview of how to facilitate OPT sessions. It includes how to begin and end OPT sessions safely, sensitively and ethically, including the importance of a therapeutic contract and coherent assessment processes of the client's suitability and ability to engage with OPT on different media. It also addresses the environment where OPT takes place and how to respond to technology failures.

Learning outcomes

By the end of this subject area students will be able to:

- Demonstrate knowledge of initial assessment processes and the factors associated with initial and ongoing client suitability for OPT
- Demonstrate the ability to identify existing and emerging mental health issues when working remotely and take appropriate action if and when required
- Demonstrate an ability to negotiate and agree a contract appropriate to the media being offered
- Work within a secure, confidential and appropriate environment for OPT work and encourage the client to do the same
- Demonstrate the ability to agree a contingency plan with the client in case of technology failure
- Use knowledge of issues that can impact on ending OPT work to bring OPT sessions, and the therapeutic process to an end sensitively, appropriately and within the time boundary
- Assessing clients' presenting issues, both physical and psychological, using CORE or other online assessment tools
- Assessing clients' levels of care and support required
- Factors influencing clients' initial and ongoing suitability for OPT and for different media
- Clients' preferences, accessibility and competence regarding the type of technology and their ability to express emotion in different OPT media
- Clients' past experience of communicating remotely
- Identifying existing or emerging mental health issues
- Responding to existing or emerging mental health issues
- Staying within professional limits of competence
- Contracting for OPT:
 - What needs to be covered in the contracting stage for OPT
 - Challenges to assessing, negotiating and contracting with clients for OPT e.g. lack of visual cues
- Appropriate environments for practitioner and client during OPT
- Difficulties in accessing the phone and/or internet in a secure and private place, including technological limitations
- Supporting clients to be in an environment that is conducive to engaging with therapy
- Supporting clients to be in an environment free from distractions and 'things to do'
- The practitioner's environment and what it might communicate to clients
- Managing technology failures
- Negotiating a contingency plan with clients in case of technology failure e.g. if internet fails, continue the session by phone
- Ending an OPT session safely and appropriately

Essential content

- Preparing for an OPT session
- Supporting clients to prepare for OPT
- Knowledge of initial assessment requirements and processes
- Knowledge of information needed to make a coherent initial assessment of clients' needs

Essential content continued.

- How ending an OPT session differs from ending an in-the-room session e.g. clients go straight back into their life with no transitional time or space
- Knowledge that a strong sense of intimacy developed by the accessibility and immediacy of technology means some clients may find it especially difficult to end the OPT relationship
- Ending the OPT work safely and sensitively, providing further OPT resources as appropriate

For more information about the OPT competences related to Subject area 5, please refer to the following sections of BACP's *Online and phone therapy (OPT) competence framework*:

5. iii. 11. i. 13. i. ii. and iii. 16.i.

Subject area 6: Risk

Introduction

The aim of this subject area is to raise awareness of the need to identify potential existing or emerging risks and to respond appropriately in OPT.

Learning outcomes

By the end of this subject area students will be able to:

- Demonstrate the ability to identify, assess and respond to existing and/or emerging risk during OPT
- Demonstrate knowledge of the challenges in assessing and responding to risk when working remotely
- Demonstrate knowledge of how to respond appropriately in the event of a medical emergency during OPT
- Knowledge of how to engage appropriately with other professionals and/or facilitate a safe and timely referral
- Differing challenges to in-the-room work
- Limitations of interventions for dealing with risk in OPT
- Relational difficulties that could be heightened by OPT
- Responding to urgent and immediate risk during OPT e.g. medical emergencies, suicide, serious self-harm
- Liaising with others and accessing support in emergencies and high-risk situations
- Liaising with other professionals appropriately and, wherever possible, maintaining clients' confidentiality and privacy
- Knowledge of information required to enable support if crisis emerges, such as details of GP, friends, family, client's postal address and telephone number
- Appropriate and timely referrals
- Acknowledging OPT and practitioner limitations and those presented by the media and setting in relation to risk
- Knowledge of referral and signposting pathways, and other supplementary resources
- Supporting clients to access alternative support

Essential content

- Risk and protective factors associated with OPT
- Identifying and responding appropriately to existing and emerging risks during OPT
- Risk assessment and risk management procedures
- Risk assessment measures and tools such as CORE and PHQ-9 indicating elevated levels of risk
- Challenges to assessing risk during OPT
- Risk indicators when visual cues are not present
- Indicators of distress and vulnerability without verbal cues

For more information about the OPT competences related to Subject area 6, please refer to the following sections of BACP's *Online and phone therapy (OPT) competence framework*:

5. iii. 11. i. 13. i. ii. and iii. 16. i.

Subject area 7: Equality, diversity, and inclusion

Introduction

The aim of this subject area is to ensure students are able to acknowledge and respond appropriately to issues of equality, diversity and inclusion in OPT.

Learning outcomes

By the end of this subject area students will be able to:

- Demonstrate knowledge of and ability to respond appropriately to equality, diversity and inclusion issues pertinent to OPT
- Demonstrate knowledge of how OPT can widen participation for some clients but be a barrier for others

Essential content

- Equality, diversity and inclusion issues specific to OPT
- Cultural differences in relation to OPT and the associated technology
- Identifying and addressing inequalities that arise in OPT
- Using curiosity to clarify meaning and understanding and avoid assumptions during OPT
- Factors that widen participation in OPT
- The 'ACE' of OPT:
 - Accessibility
 - Convenience
 - Economics

- Barriers to accessing OPT, for example:
 - Limited or no access to devices
 - No internet or phone signal
 - Lack of technical ability
- How OPT can mitigate exclusions, for example:
 - Clients with certain physical disabilities may be unable to access face-to-face (in-the-room) therapy
 - Geographical barriers can be removed and specialist therapists can be accessed not dependent on locality
 - Video platforms can use subtitles or live text for hearing impairment
 - Language barriers can be mitigated
- Technical aids and support software that widen accessibility
- How practitioner attitudes and preferences in relation to OPT and cyberculture impact on digital inclusion/exclusion

For more information about the OPT competences related to Subject area 7, please refer to the following sections of BACP's *Online and phone therapy (OPT) competence framework*:

1. iv. 6. i. ii. iii. and v.

Subject area 8: Communication and therapeutic skills

Introduction

The aim of this subject area is to explore communication and therapeutic skills pertinent to OPT and to the different media employed by OPT. It emphasises the importance of the therapeutic working alliance and of working within a coherent and consistent model or approach. This subject area also acknowledges the risks of misunderstandings in OPT communication, and therefore, the need to adapt OPT communications and interventions to meet the needs of individual clients.

Learning outcomes

By the end of this subject area students will be able to:

- Demonstrate an ability to apply a consistent theoretical model/approach when providing OPT
- Demonstrate the ability to offer appropriate interventions and techniques specific to the OPT media being used
- Demonstrate the ability to form and maintain an effective therapeutic alliance within OPT
- Demonstrate the ability to adjust and adapt OPT communication and/or interventions to match clients' needs
- Interventions and techniques specific to online video therapy, for example:
 - Being mindful of time lags in communication
 - Finding ways to come in without talking over the client
 - Using more frequent non-verbal encouragers
 - Acknowledge there are reduced visual cues and pay additional attention to posture, gestures, tone of voice, silences
- Interventions and techniques specific to phone therapy, for example:
 - Acknowledging and mitigating the impact of no visual cues
 - Paying additional attention to tone of voice and silences
 - Offering more frequent encouragers
 - Offering reflective responses to maintain connection and check understanding
- Use creative methods of communication during OPT, for example:
 - Music
 - Film
 - Specific non-verbal interactions
 - Whiteboards
 - Links
 - Visual cue cards and signs
- Reasons for an increased risk of misunderstanding during OPT
- How to raise awareness and mitigate against breakdowns in communication during OPT by checking for, identifying and rectifying misunderstandings
- Forming and maintaining a therapeutic working alliance for OPT
- Applying core theoretical models to OPT and critically evaluating their effectiveness within a range of OPT media
- Adapting core theoretical models for certain media
- Using a coherent theoretical approach or model during OPT to understand the client's personality, history, patterns of relating and presenting issues
- Challenges for certain theoretical approaches/ models in relation to OPT e.g. practitioners tend to be more active in OPT, which is not in keeping with some theoretical approaches/models

Essential content

Essential content continued.

- Differences and similarities of forming and maintaining a therapeutic working alliance for OPT, compared to forming and maintaining a therapeutic working alliance for in-the-room therapy
- The role and significance of language in OPT and its criticality to the development of a shared understanding and therapeutic working alliance
- Personalising communication and interventions to meet client needs during OPT
- Adapting content, style and depth of communication to ensure clients are able to understand and make use of OPT
- Ensuring meaning is interpreted accurately by the practitioner and client, checking and clarifying with regularity
- Importance of sensitivity to the language and vocabulary used by clients and reciprocated communication

For more information about the OPT competences related to Subject area 8, please refer to the following sections of BACP's *Online and phone therapy (OPT) competence framework*:

1 v. and vi. 9. i. ii. iii. and iv. 18. i.

Subject area 9: Working with psychological processes

Introduction

The aim of this subject area is to highlight some of the differences between how people might behave when communicating and interacting during OPT, opposed to when they communicate and interact during in-the-room therapy. There is consideration of the important implications this has for the therapeutic process.

- Impact and consequences of disinhibition during OPT, for example rapid disclosure of information that risks leaving clients feeling overwhelmed
- Ways in which disinhibited clients can be helped to pace their communications that is conducive to their ability to process material

For more information about the OPT competences related to Subject area 9, please refer to the following sections of BACP's *Online and phone therapy (OPT) competence framework*:

10. iii. iv. and v.

Learning outcomes

By the end of this subject area students will be able to:

- Demonstrate knowledge of the implications of disinhibition for the therapeutic process
- Demonstrate an understanding of how disinhibition can impact on practitioners as well as clients and know how to take steps to ameliorate and manage its impact

Essential content

- How people can behave differently working remotely compared to working face to face (in the room)
- The meaning of disinhibition in OPT e.g. when the pace and nature of self-disclosure are increased
- How a technologically mediated environment can encourage disinhibition for both client and practitioner, and ways in which this will have a significant impact on the therapeutic process
- Issues that can encourage disinhibition during OPT, for example:
 - a sense of being anonymous and/or invisible
 - an absence of external authority and not experiencing others as 'real'
- Practitioner disinhibition
- Client disinhibition

Subject area 10: Self-care

Introduction

The aim of this subject area is to acknowledge some of the challenges for OPT practitioners and to emphasise the need to practise robust self-care in order to maintain and enhance wellbeing and fitness to practise.

Learning outcomes

By the end of this subject area students will be able to:

- Demonstrate knowledge of the particular challenges of OPT to practitioner wellbeing and how to ensure self-care
- Establishing and maintaining strong OPT boundaries, for example:
 - Contingency plans in case of technology failure
 - Engaging fully with supervision, having additional sessions if possible
 - Working within OPT competence
 - Developing internal and external strategies for managing the additional pressures and complexities of responding to risk in OPT
- Limiting communication between practitioner and client to the agreed therapeutic session time (not on social network, text messages etc.)
- Clarifying who will initiate the OPT call/session i.e. practitioner or client

Essential content

- Practitioner isolation when working in OPT
- Challenges to OPT practitioner wellbeing, for example:
 - Screen fatigue and eye strain
 - Changes in posture through using different devices and technologies
 - Additional stress and lack of confidence of using unfamiliar devices and/or technology
 - The emotional impact of 'holding' risk issues in OPT
 - Fears around technology failing
- Self-care activities for OPT practitioners, for example:
 - Structuring working day differently to allow breaks from screens and other devices
 - Attending to ergonomic positioning of furniture and devices/technology
 - Taking regular breaks
 - Additional CPD

For more information about the OPT competences related to Subject area 10, please refer to the following sections of BACP's *Online and phone therapy (OPT) competence framework*:

3. ii. 5. iii. 7. i. 12. i. 14. i.

Subject area 11: Supervision

Introduction

The aim of this subject area is to emphasise the need for appropriate OPT supervision and to support students to engage fully in the OPT supervisory relationship and process.

Learning outcomes

By the end of this subject area students will be able to:

- Demonstrate the ability to make effective use of online/phone supervision to support and develop OPT practice
- Use supervision to offer best practice in terms of ethical challenges, risk, referral and working within own limits of proficiency for OPT

- Using supervision to explore the benefits and constraints of OPT for individual clients
- Using supervision to recognise and respond to OPT specific issues, for example:
 - Risk challenges in OPT
 - Ethical challenges specific to OPT
 - Limits of ability and competence
 - Particular challenges of blended therapy
 - OPT signposting and referral

For more information about the OPT competences related to Subject area 11, please refer to the following sections of BACP's *Online and phone therapy (OPT) competence framework*:

3. ii. 5. iii. 7. i. 12. i. 14. i.

Essential content

- Using OPT supervision to support and develop best OPT practice
- Importance of working with a supervisor who is trained and experienced in OPT
- Supervision that parallels the practitioner/client interaction and experience, and will offer a rich and authentic reflective space for the resulting OPT supervision
- Sourcing an OPT supervisor
- Using supervision to explore how OPT impacts on the client and the therapeutic work
- Using supervision to explore and respond to how OPT impacts on the practitioner

The competences expected of an OPT supervisor can be found in BACP's *Supervision competence framework*:
<https://www.bacp.co.uk/events-and-resources/ethics-and-standards/competences-and-curricula/>

Option 2: Extended OPT training



Subject area 1: OPT media and technology

Introduction

This subject area relates to identifying the different ways therapy can be facilitated remotely, alongside the associated technology. It refers to the device(s) and/or application(s) used to mediate communication and interaction in OPT, where the practitioner and client are based in different physical locations.

For courses delivering extended OPT training, the learning also requires student competence in a range of media, devices and technologies appropriate to their own modality. These elements can also be delivered as part of a top-up training, or in isolation as CPD (Option 4).

Learning outcomes

By the end of this subject area students will be able to:

- Demonstrate knowledge of a range of OPT media and associated technology and/or devices
- Critically evaluate own digital competence in terms of setting up and using technology and devices to effectively facilitate remote counselling sessions
- Critically evaluate and use a range of technologies appropriate for own modality/theoretical orientation and the client's needs

Essential content

- Definitions of remote therapy and the different ways it can be facilitated, for example:
 - Visual and audio communication taking place at a distance (videoconference)
 - Purely audio cues from each party (phone)
 - Without visual or audio cues from each party (text only)
- Definitions of:
 - Synchronous communication: therapy conducted in real time e.g. video, platforms

- Asynchronous communication: there is a time delay between responses e.g. email, SMS

- Setting up and securely managing the media being used for OPT
- The technical skills needed to effectively use the OPT media selected
- Knowledge of how different technology and media are set up and used
- How to troubleshoot common difficulties with media and technology
- Cyber and phone security
- Supporting clients to engage with OPT safely and securely
- Information on a range of media, devices and technologies used in OPT
- Setting up and managing a range of different media, devices and technologies safely and effectively
- How theoretical orientation of the practitioner is likely to impact on the choice of technological media
- Evaluating and assessing different media, devices and technologies for their appropriateness in relation to the student's core theoretical approach and/or model
- Evaluating and assessing different media, devices and technologies for their appropriateness in relation to the client's needs
- Appropriate techniques and interventions for each medium, device and technology
- New and emerging applications, platforms and technology and related security issues

For more information about the OPT competences related to Subject area 1, please refer to the following sections of BACP's *Online and phone therapy (OPT) competence framework*:

1. i, ii, iii, iv, v, vi and vii 4. ii. 9. i. 13. i.

Subject area 2: The scope of OPT working

Introduction

This subject area relates to how OPT differs to face-to-face (in-the-room) counselling and how it can be offered to meet clients' current and changing needs.

For courses delivering Extended OPT training, the content also focuses on the potential benefits and constraints of OPT. It also highlights contraindications for OPT engagement. These elements can also be delivered as part of a top-up training, or in isolation as CPD (Option 4).

Learning outcomes

By the end of this subject area students will be able to:

- Identify and use understanding of the differences between OPT and in-the-room therapy to inform the work
- Use knowledge of the nature of blended therapy to meet changing needs whilst working within own limits of ability
- Critically evaluate the benefits and constraints of the different ways therapy can be offered remotely
- Identify when and why OPT is not appropriate and ensure referral and/or signposting is appropriate to the client's current risk and needs
- Different ways therapy can be blended e.g. phone and in the room, online and phone, online and in the room
- Reasons to offer blended therapy
- Safely moving from one medium or setting to another
- Potential benefits of OPT, for example:
 - Accessibility e.g. certain disabilities, transport limitations, geographical position, technological aids and software
 - Client can remain at home
 - Flexibility
 - Provides access to specialised OPT regardless of distance
 - Provides access to different language speaking practitioners, regardless of distance
- Potential constraints of OPT, for example:
 - Technical issues
 - Technical ability
 - Accessing technology and devices
 - Data security
 - Potential for misunderstanding
 - Identifying and responding to risk
- Discussing and evaluating the benefits and constraints of OPT with potential clients
- How OPT impacts on relational dynamics
- Contraindications for engaging with OPT, for example:
 - Client's inability to access and use technology
 - Client inability to communicate remotely
 - Risk factors
 - Poor reality testing
 - Client needs a very high level of care and support

Essential content

- How OPT differs from in-the-room therapy
- How different media meet different client needs
- Potential limitations and challenges of not being physically present
- Differences in beginnings and endings e.g. lack of transitions
- Contracting differences
- Definition for blended therapy

Essential content continued.

- Client is struggling to function and cope with everyday life
- Relational issues that could be exacerbated by OPT
- Client presenting in a very fragmented and inconsistent manner
- Signposting and referral options and pathways, for example:
 - Supplementary therapeutic OPT resources during OPT
 - Further OPT resources following OPT
 - Alternative sources of support or when OPT is not suitable
- Appropriateness and integrity of OPT resources
- Inappropriate OPT resources e.g. those that encourage self-harming or self-defeating behaviours
- Safe and appropriate referral
- Knowledge of referral options and pathways

For more information about the OPT competences related to Subject area 2, please refer to the following sections of BACP's *Online and phone therapy (OPT) competence framework*:

1. ix. 2. i., ii and iii. 6. ii and iii. 13. ii and iii. 14. ii. 15. i. ii. and iii.

Subject area 3: Ethical and professional practice

Introduction

The aim of this subject area is to provide students with a sound working knowledge of the ethical, professional and legal frameworks and issues that are pertinent to OPT.

The learning for extended OPT training also covers ethical decision making, which can also be delivered as part of a top-up training or expanded upon for focused CPD (Option 4).

NB: This subject area is not intended to sit as a stand-alone module. The contents of this subject area underpin each of the other subject areas, and so issues relating to ethical and professional practice should be woven into all of the other taught sessions.

Learning outcomes

By the end of this subject area students will be able to:

- Demonstrate the ability to work within an ethical, professional and legal framework for OPT
- Demonstrate the ability to set up a secure OPT therapeutic frame and conduct therapeutic work effectively via the medium being offered and support the client to do the same
- Maintain professional standards with clients in all OPT communications, including text-based correspondence outside of OPT sessions
- Critically reflect on the legal and ethical challenges related to OPT: identifying a safe and considered course of action appropriate to the client's current situation
- Professional limits of ability and how to address gaps in competence
- Ways in which to establish client identity and establish appropriate anonymity around own identity
- Establish and maintain appropriate boundaries for OPT
- How to establish an OPT therapeutic frame
- Providing an appropriate visual environment for OPT when there is visual contact
- Working in an appropriate location that is secure and confidential, and supporting the client to do the same
- Using private and secure technology and supporting the client to do the same
- Netiquette
- Maintaining professionalism in text-based communication that takes place outside of the actual OPT sessions e.g. arranging/changing session times, negotiating fee payment, contracting issues
- Maintaining professionalism and boundaries in all administrative contact with the client
- Legal, ethical, and professional challenges and dilemmas specific to OPT
- Responding safely and effectively to legal, ethical, and professional challenges specific to OPT
- How OPT supervision supports ethical decision making to identify an appropriate course of action
- Ethical decision making
- Ethical decision-making model(s)

Essential content

- Key principles that inform ethical practice and appropriate standards of conduct for OPT (with reference to BACP's current Ethical Framework)
- Relevant UK legislation (e.g. GDPR)

For more information about the OPT competences related to Subject area 3, please refer to the following sections of BACP's *Online and phone therapy (OPT) competence framework*:

1. viii. 3. i. ii. iii. iv and v. 7. ii.

Subject area 4: Confidentiality and data protection

Introduction

The aim of this subject area is to provide an overview of confidentiality, data protection, security and client and practitioner privacy in relation to OPT.

The learning for extended OPT training also focuses on the security limitations of different OPT media, technology and devices, alongside steps to mitigate the security risks. These elements can be delivered as part of a top-up training, or in isolation as CPD (Option 4).

Learning outcomes

By the end of this subject area students will be able to:

- Demonstrate the ability to inform the client about limits to confidentiality and privacy issues when working remotely
- Demonstrate the ability to maintain client safety and confidentiality in relation to data protection, technology and data threats
- Demonstrate knowledge of how data protection and privacy apply to different media for OPT
- Demonstrate knowledge of and ability to work within agency/placement policies and procedures in relation to data security
- Demonstrate knowledge and understanding of how to manage and monitor own digital footprint and that of the clinical work
- Identify the security limitations of the different ways therapy can be offered remotely and take steps to mitigate risks to client confidentiality, privacy, and data protection
- Obtaining informed consent when working remotely. There should be a written record of the information that has been given to the client prior to requesting their consent to proceed
- GDPR legislation
- ICO requirements
- Legal requirements relating to confidentiality, privacy, consent and data protection in relation to OPT
- Storing and processing client data e.g. client records
- Reporting data breaches
- Maintaining client confidentiality and privacy when working remotely
- Maintaining safety around data protection for all aspects of OPT and supporting clients to do the same
- Confidentiality and privacy issues in relation to different OPT media e.g. being overheard, internet search history, recording sessions, data leaks
- Privacy and safety in relation to possible client circumstances and vulnerabilities e.g. challenging home situation, unable to talk freely etc.
- Working within agency policies and procedures for data security
- Risks of using personal technology when working for an agency and/or in private practice
- Sharing client data with agency and/or others appropriately
- Using the counselling agencies' media and technology
- What is meant by the term digital footprint e.g. the trail of data created while using the internet
- How students can manage their own digital footprint and that of their client work
- Practitioners use of social networking and other online spaces

Essential content

- Discussing and clarifying confidentiality limits and privacy issues with the client when working remotely
- Informing client about how their data will be stored and who they will be shared with e.g. agency

Essential content continued.

- Applying privacy settings and developing digital policies to manage practitioner's digital footprint
- Recording sessions: permissions and implications
- Security requirements, associated with different media, technologies, devices, platforms, settings, context, and method of delivery of OPT
- Working with and offering full information regarding security and privacy to clients, to mitigate risks to security of different media, technologies, devices, platforms, settings, context, and method of delivery of OPT
- Security limitations of current and emerging technology, devices and digital platforms used for OPT

For more information about the OPT competences related to Subject area 4, please refer to the following sections of BACP's *Online and phone therapy (OPT) competence framework*:

1. iii. 4. i. and ii. 10. viii. and ix.

Subject area 5: Facilitation of OPT sessions

Introduction

The aim of this subject area is to give an overview of how to facilitate OPT sessions. It includes how to begin and end OPT sessions safely, sensitively and ethically, including the importance of a therapeutic contract and coherent assessment processes of the client's suitability and ability to engage with OPT on different media. It also addresses the environment where OPT takes place and how to respond to technology failures.

The learning for extended OPT training also focuses on using assessment outcomes to adapt OPT to meet client ability, communication style and needs. These elements can also be delivered as part of a top-up training, or in isolation as CPD (Option 4).

Learning outcomes

By the end of this subject area students will be able to:

- Demonstrate knowledge of initial assessment processes and the factors associated with initial and ongoing client suitability for OPT
- Demonstrate the ability to identify existing and emerging mental health issues when working remotely, and take appropriate action if and when required
- Demonstrate an ability to negotiate and agree a contract appropriate to the media being offered
- Work within a secure, confidential and appropriate environment for OPT work and encourage the client to do the same
- Demonstrate the ability to agree a contingency plan with the client in case of technology failure
- Use knowledge of issues that can impact on ending OPT work to bring OPT sessions, and the therapeutic process to an end sensitively, appropriately and within the time boundary
- Use knowledge of different media to adapt the contract and content, style and level of OPT communication to match the client's capacity to understand and assimilate this information
- Demonstrate the ability to offer a rationale for the choice of delivery and the media agreed

Essential content

- Preparing for an OPT session
- Supporting clients to prepare for OPT
- Knowledge of initial assessment requirements and processes
- Knowledge of information needed to make a coherent initial assessment of clients' needs
- Assessing clients' presenting issues, both physical and psychological, using CORE or other online assessment tools
- Assessing clients' levels of care and support required
- Factors influencing clients' initial and ongoing suitability for OPT and for different media
- Clients' preferences, accessibility and competence regarding the type of technology and their ability to express emotion in different OPT media
- Clients' past experience of communicating remotely
- Identifying existing or emerging mental health issues
- Responding to existing or emerging mental health issues
- Staying within professional limits of competence
- Contracting for OPT
- What needs to be covered in the contracting stage for OPT
- Challenges to assessing, negotiating and contracting with clients for OPT e.g. lack of visual cues
- Appropriate environments for practitioner and client during OPT
- Difficulties in accessing the phone and/or internet in a secure and private place, including technological limitations
- Supporting clients to be in an environment that is conducive to engaging with therapy

Essential content continued.

- Supporting clients to be in an environment free from distractions and 'things to do'
- The practitioner's environment and what it might communicate to clients
- Managing technology failures
- Negotiating a contingency plan with clients in case of technology failure e.g. if internet fails, continue the session by phone
- Ending an OPT session safely and appropriately
- How ending an OPT session differs from ending an in-the-room session e.g. clients go straight back into their life with no transitional time or space
- Knowledge that a strong sense of intimacy developed by the accessibility and immediacy of technology means some clients may find it especially difficult to end the OPT relationship
- Ending the OPT work safely and sensitively, providing further OPT resources as appropriate
- Assessing clients' capacity to understand and assimilate OPT communications in order to adapt the communication style and depth of the work to match clients' abilities and needs
- Appropriate contracting for the OPT media offered e.g. online, phone, blended

- Adapting the OPT contract to acknowledge and respond to clients' capacity and ability in relation to engaging with OPT
- Providing a rationale for the OPT media and device chosen - the 'what we do and why we do it' for OPT

For more information about the OPT competences related to Subject area 5, please refer to the following sections of BACP's *Online and phone therapy (OPT) competence framework*:

1. i. 5. i. ii. and iii. 13. i. ii. and iii. 16. i. 18. i.

Subject area 6: Risk

Introduction

The aim of this subject area is to raise awareness of the need to identify potential existing or emerging risks and to respond appropriately in OPT.

The aim of the extended content is for course participants to attain the necessary knowledge and skills for carrying out risk assessments and developing risk management plans when required. It also looks at the impact of managing risk for OPT practitioners working in isolation, using assessment to ascertain and respond safely and appropriately to risk, and working together with the client to agree a plan for managing their increasing and/or challenging risk situations and/or behaviours. These elements can also be delivered as part of a top-up training, or in isolation as CPD (Option 4).

Learning outcomes

By the end of this subject area students will be able to:

- Demonstrate the ability to identify, assess and respond to existing and/or emerging risk during OPT
- Demonstrate knowledge of the challenges in assessing and responding to risk when working remotely
- Demonstrate knowledge of how to respond appropriately in the event of a medical emergency during OPT
- Knowledge of how to engage appropriately with other professionals and/or facilitate a safe and timely referral
- Identify the practical and emotional impact of lone working when, responding to, containing, and managing issues of risk arising in OPT
- Collaborate with clients to negotiate an agreement/procedure on how to assess and respond to presenting or emerging risk when working remotely
- Judge the level of information required in an assessment, based on the risk being presented, client protective factors and the support available to them

Essential content

- Risk and protective factors associated with OPT
- Identifying and responding appropriately to existing and emerging risks during OPT
- Risk assessment and risk management procedures
- Appropriate use of routine outcome measures such as CORE and PHQ-9 (i.e. not using tools and measures for risk assessment purposes)
- Challenges to assessing risk during OPT
- Risk indicators when visual cues are not present
- Indicators of distress and vulnerability without verbal cues
- Dealing challenges to in-the-room work
- Limitations of interventions for dealing with risk in OPT
- Relational difficulties that could be heightened by OPT
- Responding to urgent and immediate risk during OPT e.g. medical emergencies, suicide, serious self-harm
- Liaising with others and accessing support in emergencies and high-risk situations
- Liaising with other professionals appropriately and, wherever possible, maintaining clients' confidentiality and privacy
- Knowledge of information required to enable support if crisis emerges, such as details of GP, friends, family, client's postal address and telephone number
- Appropriate and timely referrals
- Acknowledging OPT and practitioner limitations and those presented by the media and setting in relation to risk
- Knowledge of referral and signposting pathways, and other supplementary resources
- Supporting the client to access alternative support

Essential content continued.

- Challenges of OPT work for the practitioner in relation to client risk, for example:
 - Isolation
 - Possible lack of or distant agency or organisational support
 - Lack of peer support
 - Risk of secondary trauma
 - Impact on resilience
 - Can exacerbate practitioner anxiety and fear
- Monitoring practitioner self-care, resilience and fitness to practise and engaging with external support as necessary
- Collaborating with clients to negotiate an OPT appropriate safety plan for clients presenting with emerging or increasing risk situations or behaviours
- Incorporating risk factors and risk management into the therapeutic contract
- Identifying clients' protective factors and what additional supports they have in place
- Knowledge of information required to enable support if crisis emerges, such as details of GP, friends, family, client's postal address and telephone number
- Important from the outset of being explicit about risk as part of assessment and contracting, to ensure clients understand clearly what is and is not available in the event of a crisis arising
- Initial and ongoing client assessment in relation to identifying, responding to and mitigating risk before and during OPT
- Appropriate and necessary client information needed to make risk assessment and risk management decisions in OPT

For more information about the OPT competences related to Subject area 6, please refer to the following sections of BACP's *Online and phone therapy (OPT) competence framework*:

5. iii. 11. i. 13. i. ii. and iii. 16.i.

Subject area 7: Equality, diversity, and inclusion

Introduction

The aim of this subject area is to ensure students are able to acknowledge and respond appropriately to issues of equality, diversity and inclusion in OPT.

The learning in extended OPT training relates to digital inclusion and widening participation for OPT. These elements can also be delivered as part of a top-up training, or in isolation as CPD (Option 4).

Learning outcomes

By the end of this subject area students will be able to:

- Demonstrate knowledge of and ability to respond appropriately to equality, diversity and inclusion issues pertinent to OPT
- Demonstrate knowledge of how OPT can widen participation for some clients but be a barrier for others
- Reflect on issues of digital inclusion in order to apply knowledge of technological aids and/or appropriate support software to widen accessibility to OPT for those with mobility problems and/or speech and language difficulties/ learning and processing difficulties etc.
- Economics
- Barriers to accessing OPT, for example:
 - Limited or no access to devices
 - No internet or phone signal
 - Lack of technical ability
- How OPT can mitigate exclusions, for example:
 - Clients with certain physical disabilities may be unable to access face-to-face (in-the-room) therapy
 - Geographical barriers can be removed and specialist therapists can be accessed not dependent on locality
 - Video platforms can use subtitles or live text for hearing impairment
 - Language barriers can be mitigated
- Technical aids and support software that widen accessibility
- How practitioner attitudes and preferences in relation to OPT and cyberculture impact on digital inclusion/exclusion
- Meaning of digital inclusion
- Considering and addressing digital exclusion
- Examples of how digital inclusion can be promoted, for example:

Essential content

- Equality, diversity and inclusion issues specific to OPT
- Cultural differences in relation to OPT and the associated technology
- Identifying and addressing inequalities that arise in OPT
- Using curiosity to clarify meaning and understanding and avoid assumptions during OPT
- Factors that widen participation in OPT
- The 'ACE' of OPT:
 - Accessibility
 - Convenience
 - Support software
 - Technological aids
 - Subtitles on video
 - Hearing loops and enhancements
 - Accessibility for clients with mobility issues
- Working with third party presence in OPT where confidentiality is explicitly agreed e.g. carer, signer, interpreter

For more information about the OPT competences related to Subject area 7, please refer to the following sections of BACP's *Online and phone therapy (OPT) competence framework*:

6. i. ii. iii. iv. and v. 18. i.

Subject area 8: Communication and therapeutic skills

Introduction

The aim of this subject area is to explore communication and therapeutic skills pertinent to OPT and to the different media employed by OPT. It emphasises the importance of the therapeutic working alliance and of working within a coherent and consistent model or approach. This subject area also acknowledges the risks of misunderstandings in OPT communication, and therefore, the need to adapt OPT communications and interventions to meet the needs of individual clients.

The learning in extended OPT training also relates to text-based therapy and asynchronous communication. These elements can also be delivered as part of a top-up training, or in isolation as CPD (Option 4).

Learning outcomes

By the end of this subject area students will be able to:

- Demonstrate an ability to apply a consistent theoretical model/approach when providing OPT
- Demonstrate the ability to offer appropriate interventions and techniques specific to the OPT media being used
- Demonstrate the ability to form and maintain an effective therapeutic alliance within OPT
- Demonstrate the ability to adjust and adapt OPT communication and/or interventions to match clients' needs
- Demonstrate ability to facilitate text-based sessions e.g. email
- Demonstrate knowledge of how asynchronous sessions differ from synchronous sessions
- Adapting core theoretical models for certain media
- Using a coherent theoretical approach or model during OPT to understand the client's personality, history, patterns of relating and presenting issues
- Challenges for certain theoretical approaches/ models in relation to OPT e.g. practitioners tend to be more active in OPT, which is not in keeping with some theoretical approaches/models
- Interventions and techniques specific to online video therapy, for example:
 - Being mindful of time lags in communication
 - Finding ways to come in without talking over the client
 - Using more frequent non-verbal encouragers
 - Acknowledge there are reduced visual cues and pay additional attention to posture, gestures, tone of voice, silences
- Interventions and techniques specific to phone therapy, for example:
 - Acknowledging and mitigating the impact of no visual cues
 - Paying additional attention to tone of voice and silences
 - Offering more frequent encouragers
 - Offering reflective responses to maintain connection and check understanding
- Use creative methods of communication during OPT, for example:
 - Music
 - Film
 - Specific non-verbal interactions
 - Whiteboards
 - Links
 - Visual cue cards and signs

Essential content

- Applying core theoretical models to OPT and critically evaluating their effectiveness within a range of OPT media

Essential content continued.

- Reasons for an increased risk of misunderstanding during OPT
- How to raise awareness and mitigate against breakdowns in communication during OPT by checking for, identifying and rectifying misunderstandings
- Forming and maintaining a therapeutic working alliance for OPT
- Differences and similarities of forming and maintaining a therapeutic working alliance for OPT, compared to forming and maintaining a therapeutic working alliance for in-the-room therapy
- The role and significance of language in OPT and its criticality to the development of a shared understanding and therapeutic working alliance
- Personalising communication and interventions to meet client needs during OPT
- Adapting content, style and depth of communication to ensure clients are able to understand and make use of the OPT
- Ensuring meaning is interpreted accurately by the practitioner and client, checking and clarifying with regularity
- Importance of sensitivity to the language and vocabulary used by clients and reciprocated communication
- Facilitating text-based therapy sessions e.g. by email
- Contracting and assessment in text-based therapy
- Confidentiality and security in text-based therapy
- Differences between written and spoken communication, for example:
 - Meaning cannot be moderated by contextual feelings in text
 - There is a permanence to the written word
 - More challenging to check and rectify misinterpretations and misunderstandings in text
- Establishing a therapeutic working alliance in text-based therapy
- Managing endings in asynchronous text-based therapy e.g. who sends the last message, client or practitioner?
- Managing lack of verbal and visual cues in text-based therapy
- Importance of maintaining a consistent writing style
- Finding a balance between informal and formal writing styles that maintain professionalism but engage the client in text-based therapy
- Constraints of text-based therapy, for example:
 - May lack spontaneity
 - Gaps between messages may be challenging for some clients
 - The written word is open to misunderstandings and misinterpretations
 - Practitioner and client ability to communicate well in writing
- Knowledge of written communication norms for specific media – netiquette
- Indications of psychological and emotional changes in clients' written texts
- Meaning of asynchronous communication
- Differences between synchronous and asynchronous communication
- Managing time gaps in asynchronous communication in text-based therapy
- Managing crossed messages, misunderstandings and confusions in asynchronous communication in text-based therapy

For more information about the OPT competences related to Subject area 8, please refer to the following sections of BACP's *Online and phone therapy (OPT) competence framework*:

1. v. vi. and vii. 4. i. and. ii. 5. i. 9. i. ii. iii. and iv. 11. ii. 13. ii.

Subject area 9: Working with psychological processes

Introduction

The aim of this subject area is to highlight some of the differences between how people might behave when communicating and interacting during OPT, opposed to when they communicate and interact during in-the-room therapy. There is consideration of the important implications this has for the therapeutic process.

The content in extended OPT training also explores phenomena relating to identity and telepresence and attachment issues related to OPT. These elements can also be delivered as part of a top-up training, or in isolation as CPD (Option 4).

Learning outcomes

By the end of this subject area students will be able to:

- Demonstrate knowledge of the implications of disinhibition for the therapeutic process
- Demonstrate an understanding of how disinhibition can impact on practitioners as well as clients and know how to take steps to ameliorate and manage its impact
- Recognise and respond to how clients may present in relation to identity and telepresence during OPT
- Acknowledge and work with specific issues relating to attachment that clients may present during OPT
- How a technologically mediated environment can encourage disinhibition for both client and practitioner and ways in which this will have a significant impact on the therapeutic process
- Issues that can encourage disinhibition during OPT, for example:
 - a sense of being anonymous and/or invisible
 - an absence of external authority and not experiencing others as 'real'
- Practitioner disinhibition
- Client disinhibition
- Impact and consequences of disinhibition during OPT, for example rapid disclosure of information that risks leaving clients feeling overwhelmed
- Ways in which disinhibited clients can be helped to pace their communications that is conducive to their ability to process material
- How the technological environment may heighten inappropriate and/or inaccurate fantasies and/or assumptions between practitioner and client
- Responding to and managing unique psychological phenomena that may arise or emerge in OPT e.g. people may present themselves and experience others differently in online spaces or when they are 'unseen'; this is sometimes referred to as 'telepresence'
- Respond to clients presenting with impaired reality-testing
- Attachment and rejection issues in the context of OPT
- Recognising and responding to Individual client attachment patterns and styles, which may trigger unexpected responses within OPT

Essential content

- How people can behave differently working remotely compared to working face to face (in the room)
- The meaning of disinhibition in OPT e.g. when the pace and nature of self-disclosure are increased

For more information about the OPT competences related to Subject area 9, please refer to the following sections of BACP's *Online and phone therapy (OPT) competence framework*:

3. v. 10. iii. iv. v. vi. and vii.

Subject area 10: Self-care

Introduction

The aim of this subject area is to acknowledge some of the challenges for OPT practitioners and to emphasise the need to practise robust self-care in order to maintain and enhance wellbeing and fitness to practise.

The content for extended OPT training also addresses the challenges to lone working as an OPT practitioner. These elements can also be delivered as part of a top-up training, or in isolation as CPD (Option 4).

Learning outcomes

By the end of this subject area students will be able to:

- Demonstrate knowledge of the particular challenges of OPT to practitioner wellbeing and how to ensure self-care
- Reflect on own response to offering OPT and lone working and access support to mitigate impact on personal wellbeing

Essential content

- Practitioner isolation when working in OPT
- Challenges to OPT practitioner wellbeing, for example:
 - Screen fatigue and eye strain
 - Changes in posture through using different devices and technologies
 - Additional stress and lack of confidence of using unfamiliar devices and/or technology
 - The emotional impact of 'holding' risk issues in OPT
 - Fears around technology failing
- Self-care activities for OPT practitioners, for example:

- Structuring working day differently to allow breaks from screens and other devices
- Attending to ergonomic positioning of furniture and devices/technology
- Taking regular breaks
- Additional CPD
- Contingency plans in case of technology failure
- Engaging fully with supervision, having additional sessions if possible
- Working within OPT competence
- Developing internal and external strategies for managing the additional pressures and complexities of responding to risk in OPT
- Establishing and maintaining strong OPT boundaries, for example:
 - Limiting communication between practitioner and client to the agreed therapeutic session time (not on social network, text messages etc.)
 - Clarifying who will initiate the OPT call/session i.e. practitioner or client
- The challenges of lone working for OPT practitioners e.g. isolation, lack of support
- Practitioner's personal resilience in response to OPT lone working
- Undertaking an OPT practitioner audit of wellbeing
- Identifying and making appropriate use of OPT practitioner support networks, including supervision

For more information about the OPT competences related to Subject area 10, please refer to the following sections of BACP's *Online and phone therapy (OPT) competence framework*:

3. ii. 5. iii. 7. i. and ii. 12. i. 14. i.

Subject area 11: Supervision

Introduction

The aim of this subject area is to emphasise the need for appropriate OPT supervision and to support students to engage fully in the OPT supervisory relationship and process.

The learning in the extended OPT training also focuses on how supervision supports and enhances OPT practice. It also looks at how supervision supports practitioners to explore processes and phenomena specific to OPT. These elements can also be delivered as part of a top-up training, or in isolation as CPD (Option 4).

Learning outcomes

By the end of this subject area students will be able to:

- Demonstrate the ability to make effective use of online/phone supervision to support and develop OPT practice
- Use supervision to offer best practice in terms of ethical challenges, risk, referral and working within own limits of proficiency for OPT
- Demonstrate knowledge of the nature of supervision to support, develop and enhance OPT practice
- Use the supervision relationship to explore processes and phenomena specific to OPT
- Supervision that parallels the practitioner/client interaction and experience, will offer a rich and authentic reflective space for the resulting OPT supervision
- Sourcing an OPT supervisor
- Using supervision to explore how OPT impacts on the client and the therapeutic work
- Using supervision to explore and respond to how OPT impacts on the practitioner
- Using supervision to explore the benefits and constraints of OPT for individual clients
- Using supervision to recognise and respond to OPT specific issues, for example:
 - Risk challenges in OPT
 - Ethical challenges specific to OPT
 - Limits of ability and competence
 - Particular challenges of blended therapy
 - OPT signposting and referral
- Using OPT supervision to optimise all aspects of OPT practice
- Accessing OPT supervision that will support and develop the OPT practitioner's work in appropriate, safe and informed ways
- Using the supervisory relationship to explore relational dynamics specific to OPT
- Using the supervisory relationship to acknowledge, explore, understand and respond to processes and phenomena specific to OPT
- Using supervision to respond to clients with impaired reality testing
- The dynamics of an OPT supervisory relationship and how it differs from face-to-face (in-the-room) supervision

Essential content

- Using OPT supervision to support and develop best OPT practice
- Importance of working with a supervisor who is trained and experienced in OPT

The competences expected of an OPT supervisor can be found in BACP's *Supervision competence framework*: <https://www.bacp.co.uk/events-and-resources/ethics-and-standards/competences-and-curricula/>

For more information about the OPT competences related to Subject area 11, please refer to the following sections of BACP's *Online and phone therapy (OPT) competence framework*:

2. i. and ii. 3. ii. 7. i. and ii. 11. iii. 14. i.

Subject area 12: Working internationally (for extended OPT training or top-up training only)

Introduction

The aim of this extended learning subject area is to consider legal, ethical, professional and logistical issues related to working internationally.

For more information about the OPT competences related to Subject area 12, please refer to the following sections of BACP's *Online and phone therapy (OPT) competence framework*:

8. i. ii. and iii.

Learning outcomes

By the end of this subject area students will be able to:

- Critically reflect on the ethical and logistical challenges of offering OPT internationally.

Essential content

- Factors that may impact on the legality of offering OPT internationally
- The complexities of professional, legal, and ethical issues related to working internationally
- Risk assessment and management when offering OPT internationally
- Insurance requirements for working internationally.

NB: Practitioners are responsible for ensuring their OPT practice with clients overseas is safe, legal and ethical in accordance with the relevant legislation in the country where the client is based. In addition, practitioners are responsible for ensuring that they have adequate insurance to cover them for their overseas practice, in accordance with the BACP Ethical Framework for the Counselling Professions (2018), or an equivalent professional body with whom the practitioner is affiliated.

Option 3: Top-up OPT training



Subject area 1: OPT media and technology

Introduction

This subject area relates to identifying the different ways therapy can be facilitated remotely, alongside the associated technology. It refers to the device(s) and/or application(s) used to mediate communication and interaction in OPT, where the practitioner and client are based in different physical locations.

This learning focuses on student competence in a range of media, devices and technologies appropriate to their own modality. These elements can be delivered as part of a top-up training, or in isolation as CPD (Option 4).

- New and emerging applications, platforms and technology and related security issues
- Information on a range of media, devices and technologies used in OPT

For more information about the OPT competences related to Subject area 1, please refer to the following sections of BACP's *Online and phone therapy (OPT) competence framework*:

1. i. ii. iii. iv. v. vi. and vii. 4. ii. 9. i. 13. i.

Learning outcomes

By the end of this subject area students will be able to:

- Critically evaluate and use a range of technologies appropriate for own modality/theoretical orientation and the client's needs

Essential content

- Information on a range of media, devices and technologies used in OPT
- Setting up and managing a range of different media, devices and technologies safely and effectively
- How theoretical orientation of the practitioner is likely to impact on the choice of technological media
- Evaluating and assessing different media, devices and technologies for their appropriateness in relation to the student's core theoretical approach and/or model
- Evaluating and assessing different media, devices and technologies for their appropriateness in relation to the client's needs
- Appropriate techniques and interventions for each medium, device and technology

Subject area 2: The scope of OPT working

Introduction

This subject area relates to how OPT differs to face-to-face (in-the-room) counselling and how it can be offered to meet clients' current and changing needs.

This learning focuses on the potential benefits and constraints of OPT. It highlights contraindications for OPT engagement. These elements can be delivered as part of a top-up training, or in isolation as CPD (Option 4).

Learning outcomes

By the end of this subject area students will be able to:

- Critically evaluate the benefits and constraints of the different ways therapy can be offered remotely
- Identify when and why OPT is not appropriate and ensure referral and/or signposting is appropriate to the client's current risk and needs

Essential content

- Potential benefits of OPT, for example:
 - Accessibility e.g. certain disabilities, transport limitations, geographical position, technological aids and software
 - Client can remain at home
 - Flexibility
 - Provides access to specialised OPT regardless of distance
- Provides access to different language speaking practitioners, regardless of distance
- Potential constraints of OPT, for example:
 - Technical issues
 - Technical ability
 - Accessing technology and devices
 - Data security

- Potential for misunderstanding
- Identifying and responding to risk
- Discussing and evaluating the benefits and constraints of OPT with potential clients
- How OPT impacts on relational dynamics
- Contraindications for engaging with OPT, for example:
 - Client's inability to access and use technology
 - Client inability to communicate remotely
 - High risk
 - Poor reality testing
 - Client needs a very high level of care and support
 - Client is struggling to function and cope with everyday life
 - Relational issues that could be exacerbated by OPT
 - Client presenting in a very fragmented and inconsistent manner
- Signposting and referral options and pathways, for example:
 - Supplementary therapeutic OPT resources during OPT
 - Further OPT resources following OPT
 - Alternative sources of support or when OPT is not suitable
- Inappropriate OPT resources e.g. those that encourage self-harming or self-defeating behaviours
- Safe and appropriate referral
- Knowledge of referral options and pathways

For more information about the OPT competences related to Subject area 2, please refer to the following sections of BACP's *Online and phone therapy (OPT) competence framework*:

2. i. and ii. 6. ii and iii. 13. ii and iii. 14. ii. 15. i. ii. and iii.

Subject area 3: Ethical and professional practice

Introduction

The aim of this subject area is to provide students with a sound working knowledge of the ethical, professional and legal frameworks and issues that are pertinent to OPT.

The additional learning covering ethical decision making, can also be delivered as part of a top-up training or expanded upon for focused CPD (Option 4).

NB: This subject area is not intended to sit as a stand-alone module. The contents of this subject area underpin each of the other subject areas, and so issues relating to ethical and professional practice should be woven into all of the other taught sessions.

Learning outcomes

By the end of this subject area students will be able to:

- Critically reflect on the legal and ethical challenges related to OPT: identifying a safe and considered course of action appropriate to the client's current situation

Essential content

- Legal, ethical, and professional challenges and dilemmas specific to OPT
- Responding safely and effectively to legal, ethical, and professional challenges specific to OPT
- How OPT supervision supports ethical decision making to identify an appropriate course of action
- Ethical decision making
- Ethical decision-making model(s)

For more information about the OPT competences related to Subject area 3, please refer to the following sections of BACP's *Online and phone therapy (OPT) competence framework*:

3. i. 7. ii.

Subject area 4: Confidentiality and data protection

Introduction

The aim of this subject area is to provide an overview of confidentiality, data protection, security and client and practitioner privacy in relation to OPT.

The learning here focuses on the security limitations of different OPT media, technology and devices, alongside steps to mitigate the security risks. These elements can be delivered as part of a top-up training, or in isolation as CPD (Option 4).

Learning outcomes

By the end of this subject area students will be able to:

- Identify the security limitations of the different ways therapy can be offered remotely and take steps to mitigate risks to client confidentiality, privacy, and data protection

Essential content

- Security requirements, associated with different media, technologies, devices, platforms, settings, context, and method of delivery of OPT
- Working with and offering full information regarding security and privacy to clients, to mitigate risks to security of different media, technologies, devices, platforms, settings, context, and method of delivery of OPT
- Security limitations of current and emerging technology, devices and digital platforms used for OPT

For more information about the OPT competences related to Subject area 4, please refer to the following sections of BACP's *Online and phone therapy (OPT) competence framework*:

1. iii. 4. ii. 10. ix.

Subject area 5: Facilitation of OPT sessions

Introduction

The aim of this subject area is to give an overview of how to facilitate OPT sessions. It includes how to begin and end OPT sessions safely, sensitively and ethically, including the importance of a therapeutic contract and coherent assessment processes of the client's suitability and ability to engage with OPT on different media. It also addresses the environment where OPT takes place and how to respond to technology failures.

This learning focuses on using assessment outcomes to adapt OPT to meet client ability, communication style and needs. These elements can be delivered as part of a top-up training, or in isolation as CPD (Option 4).

Learning outcomes

By the end of this subject area students will be able to:

- Use knowledge of different media to adapt the contract and content, style and level of OPT communication to match the client's capacity to understand and assimilate this information
- Demonstrate the ability to offer a rationale for the choice of delivery and the media agreed

Essential content

- Assessing clients' capacity to understand and assimilate OPT communications in order to adapt the communication style and depth of the work to match clients' abilities and needs
- Appropriate contracting for the OPT media offered e.g. online, phone, blended
- Adapting the OPT contract to acknowledge and respond to clients' capacity and ability in relation to engaging with OPT
- Providing a rationale for the OPT media and device chosen - the 'what we do and why we do it' for OPT

For more information about the OPT competences related to Subject area 5, please refer to the following sections of BACP's *Online and phone therapy (OPT) competence framework*:

1. i. 5. i. and ii. 13. i. 18. i.

Subject area 6: Risk

Introduction

The aim of this subject area is to raise awareness of the need to identify potential existing or emerging risks and to respond appropriately in OPT.

The aim of this content is for course participants to attain the necessary knowledge and skills for carrying out risk assessments and developing risk management plans when required. It also looks at the impact of managing risk for OPT practitioners working in isolation, using assessment to ascertain and respond safely and appropriately to risk, and working together with the client to agree a plan for managing their increasing and/or challenging risk situations and/or behaviours. These elements can be delivered as part of a top-up training, or in isolation as CPD (Option 4).

Learning outcomes

By the end of this subject area students will be able to:

- Identify the practical and emotional impact of lone working when, responding to, containing, and managing issues of risk arising in OPT
- Collaborate with clients to negotiate an agreement/procedure on how to assess and respond to presenting or emerging risk when working remotely
- Judge the level of information required in an assessment, based on the level of risk being presented and levels of support available to clients
- Impact on resilience
- Can exacerbate practitioner anxiety and fear
- Monitoring practitioner self-care, resilience and fitness to practise and engaging with external support as necessary
- Collaborating with clients to negotiate an OPT appropriate safety plan for clients presenting with emerging or increasing risk situations or behaviours
- Incorporating risk factors and risk management into the therapeutic contract
- Identifying the client's protective factors and what additional supports they have in place
- Knowledge of information required to enable support if crisis emerges, such as details of GP, friends, family, client's postal address and telephone number
- Important from the outset of being explicit about risk as part of assessment and contracting, to ensure clients understand clearly what is and is not available in the event of a crisis arising
- Initial and ongoing client assessment in relation to identifying, responding to and mitigating risk before and during OPT
- Appropriate and necessary client information needed to make risk assessment and risk management decisions in OPT

For more information about the OPT competences related to Subject area 6, please refer to the following sections of BACP's *Online and phone therapy (OPT) competence framework*:

3. ii. 5. i. 12. i. 13. i. and iii. 14. i. 17. i. and iii.

Essential content

- Challenges of OPT work for the practitioner in relation to client risk, for example:
 - Isolation
 - Possible lack of or distant agency or organisational support
 - Lack of peer support
 - Risk of secondary trauma

Subject area 7: Equality, diversity, and inclusion

Introduction

The aim of this subject area is to ensure students are able to acknowledge and respond appropriately to issues of equality, diversity and inclusion in OPT.

This learning relates to digital inclusion and widening participation for OPT. These elements can be delivered as part of a top-up training, or in isolation as CPD (Option 4).

Learning outcomes

By the end of this subject area students will be able to:

- Reflect on issues of digital inclusion in order to apply knowledge of technological aids and/or appropriate support software to widen accessibility to OPT for those with mobility problems and/or speech and language difficulties/learning and processing difficulties etc.

Essential content

- Meaning of digital inclusion
- Considering and addressing digital exclusion
- Examples of how digital inclusion can be promoted, for example:
 - Support software
 - Technological aids
 - Subtitles on video
 - Hearing loops and enhancements
 - Accessibility for clients with mobility issues
- Working with third party presence in OPT where confidentiality is explicitly agreed e.g. carer, signer, interpreter

For more information about the OPT competences related to Subject area 7, please refer to the following sections of BACP's *Online and phone therapy (OPT) competence framework*:

6. ii. iii. and iv. 18. i.

Subject area 8: Communication and therapeutic skills

Introduction

The aim of this subject area is to explore communication and therapeutic skills pertinent to OPT and to the different media employed by OPT. It emphasises the importance of the therapeutic working alliance and of working within a coherent and consistent model or approach. This subject area also acknowledges the risks of misunderstandings in OPT communication, and therefore, the need to adapt OPT communications and interventions to meet the needs of individual clients.

This learning relates to text-based therapy and asynchronous communication. These elements can be delivered as part of a top-up training, or in isolation as CPD (Option 4).

Learning outcomes

By the end of this subject area students will be able to:

- Demonstrate ability to facilitate text-based sessions e.g. email
- Demonstrate knowledge of how asynchronous sessions differ from synchronous sessions

Essential content

- Facilitating text-based therapy sessions e.g. by email
- Contracting and assessment in text-based therapy
- Confidentiality and security in text-based therapy
- Differences between written and spoken communication, for example:
 - Meaning cannot be moderated by contextual feelings in text
 - There is a permanence to the written word
 - More challenging to check and rectify misinterpretations and misunderstandings in text

- Establishing a therapeutic working alliance in text-based therapy
- Managing endings in asynchronous text-based therapy e.g. who sends the last message, client or practitioner?
- Managing lack of verbal and visual cues in text-based therapy
- Importance of maintaining a consistent writing style
- Finding a balance between informal and formal writing styles that maintain professionalism but engage the client in text-based therapy
- Constraints of text-based therapy, for example:
 - May lack spontaneity
 - Gaps between messages may be challenging for some clients
 - The written word is open to misunderstandings and misinterpretations
 - Practitioner and client ability to communicate well in writing
- Knowledge of written communication norms for specific media – netiquette
- Indications of psychological and emotional changes in the client's written text
- Meaning of asynchronous communication
- Differences between synchronous and asynchronous communication
- Managing time gaps in asynchronous communication in text-based therapy
- Managing crossed messages, misunderstandings and confusions in asynchronous communication in text-based therapy

For more information about the OPT competences related to Subject area 8, please refer to the following sections of BACP's *Online and phone therapy (OPT) competence framework*:

1. vii. 4. i. and. ii. 5. i. 11. ii. 13. ii.

Subject area 9: Working with psychological processes

Introduction

The aim of this subject area is to highlight some of the differences between how people might behave when communicating and interacting during OPT, opposed to when they communicate and interact during in-the-room therapy. There is consideration of the important implications this has for the therapeutic process.

This learning explores phenomena relating to identity and telepresence and attachment issues related to OPT. These elements can be delivered as part of a top-up training, or in isolation as CPD (Option 4).

Learning outcomes

By the end of this subject area students will be able to:

- Recognise and respond to how clients may present in relation to identity and telepresence during OPT
- Acknowledge and work with specific issues relating to attachment that clients may present during OPT

Essential content

- How the technological environment may heighten inappropriate and/or inaccurate fantasies and/or assumptions between practitioner and client
- Responding to and managing unique psychological phenomena that may arise or emerge in OPT e.g. people may present themselves and experience others differently in online spaces or when they are 'unseen'; this is sometimes referred to as 'telepresence'
- Respond to clients presenting with impaired reality-testing
- Attachment and rejection issues in the context of OPT
- Recognising and responding to Individual client attachment patterns and styles, which may trigger unexpected responses within OPT

For more information about the OPT competences related to Subject area 9, please refer to the following sections of BACP's *Online and phone therapy (OPT) competence framework*:

3. v. 10. vi. and vii.

Subject area 10: Self-care

Introduction

The aim of this subject area is to acknowledge some of the challenges for OPT practitioners and to emphasise the need to practise robust self-care in order to maintain and enhance wellbeing and fitness to practise.

This learning addresses the challenges to lone working as an OPT practitioner. These elements can be delivered as part of a top-up training, or in isolation as CPD (Option 4).

Learning outcomes

By the end of this subject area students will be able to:

- Reflect on own response to offering OPT and lone working and access support to mitigate impact on personal wellbeing

Essential content

- The challenges of lone working for OPT practitioners e.g. isolation, lack of support
- Practitioner's personal resilience in response to OPT lone working
- Undertaking an OPT practitioner audit of wellbeing
- Identifying and making appropriate use of OPT practitioner support networks, including supervision

For more information about the OPT competences related to Subject area 10, please refer to the following sections of BACP's *Online and phone therapy (OPT) competence framework*:

7 ii. 12 i.

Subject area 11: Supervision

Introduction

The aim of this subject area is to emphasise the need for appropriate OPT supervision and to support students to engage fully in the OPT supervisory relationship and process.

This learning focuses on how supervision supports and enhances OPT practice. It looks at how supervision supports practitioners to explore processes and phenomena specific to OPT. These elements can be delivered as part of a top-up training, or in isolation as CPD (Option 4).

Learning outcomes

By the end of this subject area students will be able to:

- Demonstrate knowledge of the nature of supervision to support, develop and enhance OPT practice
- Use the supervision relationship to explore processes and phenomena specific to OPT

Essential content

- Using OPT supervision to optimise all aspects of OPT practice
- Accessing OPT supervision that will support and develop the OPT practitioner's work in appropriate, safe and informed ways
- Using the supervisory relationship to explore relational dynamics specific to OPT
- Using the supervisory relationship to acknowledge, explore, understand and respond to processes and phenomena specific to OPT
- Using supervision to respond to clients with impaired reality testing
- The dynamics of an OPT supervisory relationship and how it differs from face-to-face (in-the-room) supervision

For more information about the OPT competences related to Subject area 11, please refer to the following sections of BACP's *Online and phone therapy (OPT) competence framework*:

7. ii.

Subject area 12: Working internationally (for extended OPT training or top-up training only)

Introduction

The aim of this extended learning subject area is to consider legal, ethical, professional and logistical issues related to working internationally.

For more information about the OPT competences related to Subject area 12, please refer to the following sections of BACP's *Online and phone therapy (OPT) competence framework*:

8. i. ii. and iii.

Learning outcomes

By the end of this subject area students will be able to:

- Critically reflect on the ethical and logistical challenges of offering OPT internationally.

Essential content

- Factors that may impact on the legality of offering OPT internationally
- The complexities of professional, legal, and ethical issues related to working internationally
- Risk assessment and management when offering OPT internationally
- Insurance requirements for working internationally.

NB: Practitioners are responsible for ensuring their OPT practice with clients overseas is safe, legal and ethical in accordance with the relevant legislation in the country where the client is based. In addition, practitioners are responsible for ensuring that they have adequate insurance to cover them for their overseas practice, in accordance with the BACP Ethical Framework for the Counselling Professions (2018), or an equivalent professional body with whom the practitioner is affiliated.

Reading list and resources



Reading list

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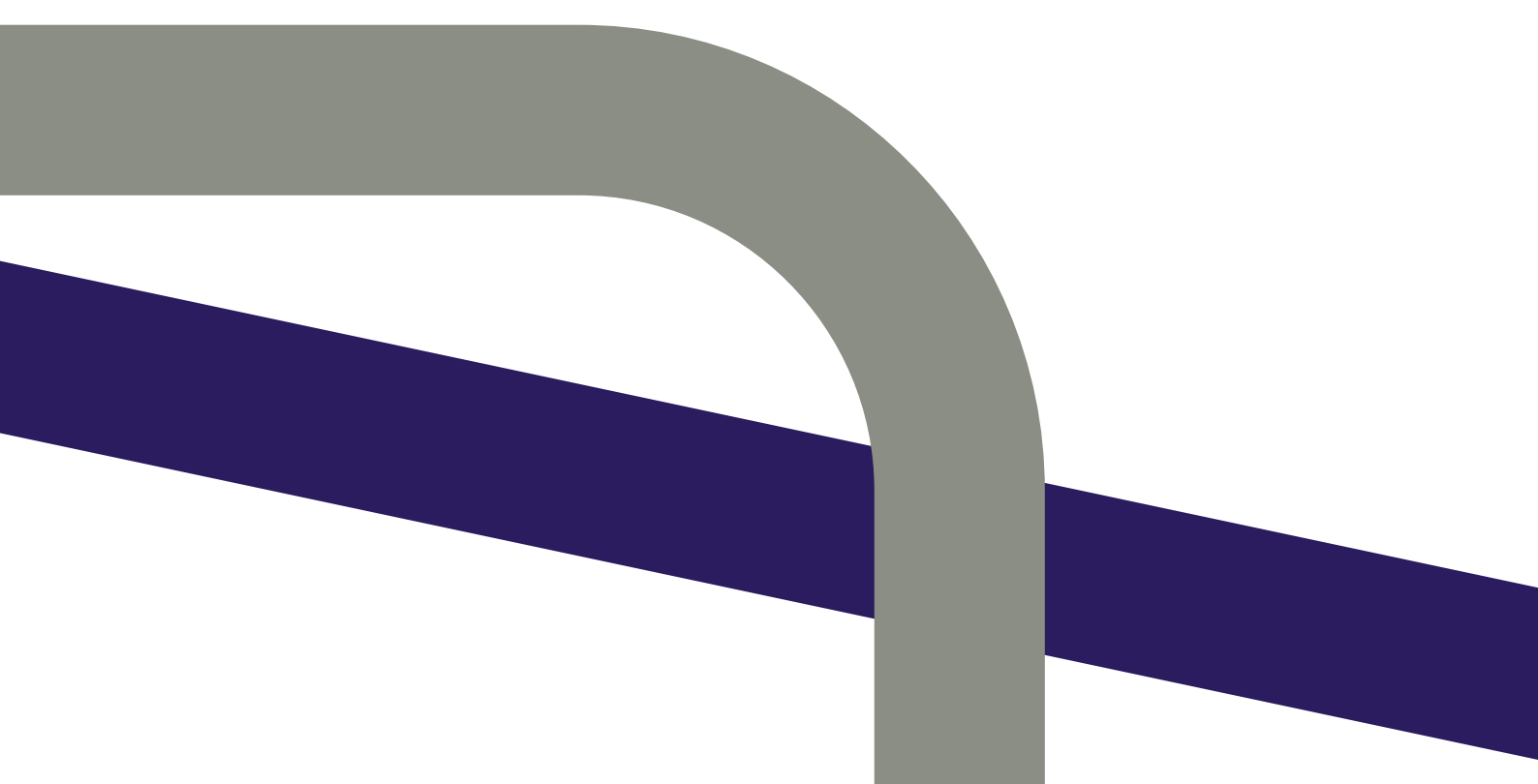
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Appendix A: Suggested student feedback questionnaire

Part one

1. Did your pre-course learning goals change during the course?
2. To what extent have you achieved your learning goals?
3. How did the course help you achieve them?
4. What else might the course have included which would have added to your achievement?
5. How did you find the academic support throughout the course?
6. How did you find the emotional support throughout the course?

Part two

7. Do you think the course covered its aims?
8. Which parts of the course did you find most useful? (Please give reasons)
9. Which parts of the course did you find least useful? (Please give reasons)
10. How satisfactory were the training methods/ exercises used?
11. If you could make one change to the course what would it be?
12. Please add any further comments about the course.
13. Overall satisfaction with the course (Please circle one number)

Not satisfied at all

Very satisfied

1 2 3 4 5 6