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## 6 EATA TRAINING CONTRACTS

### 6.1 Introduction

At a certain point in their training, students of transactional analysis sign a formal contract with EATA and a Principal Supervisor. It is the declaration of a commitment by the trainee to complete his or her journey to certification and by the Principal Supervisor to support the trainee and share responsibility for his/her appropriate development. Local and national TA associations will be able to provide details of TA trainers and institutes. They will give details of courses and costs on application. All trainees residing in Europe, irrespective of the residence of his or her Principal Supervisor, must sign contracts with EATA. For exceptions please contact PTSC. Contracts may be signed only with the organisation to which trainee and trainer belong. A person may sign more than one contract – i.e. in different fields with different Principal Supervisors.

### 6.2 Registration of EATA Contracts and Payment of Fees

Registration of contracts is usually done directly with EATA. However some national associations have agreed with EATA that they will organise a system and send the contracts to EATA for registration. If it is the latter, trainers and trainees should follow the procedures laid down by the national association. These may differ in some respects from those outlined in the training contract. To check to see if your national association has such an agreement, please consult your national association.

A contract must be registered at least one year before the date of the exam.

The Principal Supervisors must use the following checklist with their trainees each time a contract is sent to EATA for endorsement.

- 1 In order for the contract to take effect, both the trainee and the Principal Supervisor must have paid the annual membership dues to EATA for the current year.
- 2 Each contract should be dated and signed by both the trainee and the Principal Supervisor(s).
- 3 All relevant parts of the form should be completed.
- 4 The forms should either be completed in English or be accompanied by a translation into English.
- 5 On the CTA contract form, the trainee should indicate in figures the cost of continuing training at the current year's rates, specifying currency used.
- 6 Details of supervision and other requirements including national requirements, for example, a psychiatric placement, should be included.
- 7 There is a fee for filing the contract.
- 8 Please check in the coloured section of the Handbook to see if your national association has its own system for paying the contract-filing fee.
- 9 If there is a national system, please follow the instructions given.
- 10 If there is no national system, the current amount and bank account details are shown in the contract and you will need to pay the contract-filing fee by bank transfer to EATA.
- 11 Note that the trainee must pay any bank charges.
- 12 The name of the trainee and the date must appear on the bank transfer document.
- 13 When you have transferred the money, please attach a copy of the bank transfer document to the contract that you send to EATA.
- 14 Please do not send
  - a) Contracts by registered mail
  - b) Incomplete contracts

- c) Cheques, money, or bank drafts with the contracts forwarded to EATA.
- 15 If items 14 b) and c) are sent, they will be returned.
- 16 Please contact EATA if you have received no response within two months of sending the contract and documents in case they have gone astray or been lost in the post.

### 6.3 Selecting a Field of Specialisation

When a trainee and Principal Supervisor sign a contract form, they need to select and specify the field of specialisation. The four fields are Counselling, Education, Organisations and Psychotherapy. The field of specialisation is normally selected so that the majority of the trainee's professional practice is contained within it. If the trainee's practice touches upon other fields of specialisation, then the trainee and Principal Supervisor will normally agree that the trainee obtain some supervision from other trainers qualified in those fields.

NB. There may be national legal restrictions on who can practice as a psychotherapist, and it is important that trainees discuss these with their Principal Supervisor when choosing this field of specialisation.

The Principal Supervisor should take responsibility for informing candidates at the beginning of training about his or her field or fields of specialisation, and about the procedures for filing contracts. Normally Principal Supervisors only sign contracts in their own field(s) of specialisation. If a Principal Supervisor wishes to sign a contract for a field of specialisation in which they are not qualified, they need to apply to PTSC for a contract Exception (Section 6.8), or Expansion (Section 6.9).

### 6.4 Extending a Contract

A CTA training contract lasts for five years and a TSTA training contract is for seven years. If the trainee wants to continue training after these respective periods, the contractual relationship needs to be continued by signing a new contract form, following the same procedure as with the first contract. The contract fees have to be paid again. The second contract lasts for the same amount of time as the first. Formally, this second contract is a new contract, and the trainee can either change his or her Principal Supervisor, or can renegotiate the contractual details with his or her existing Principal Supervisor. **TSTA contracts may be renewed only once** but there is no requirement to attend another Training Endorsement Workshop. If the first TSTA contract expires or the second contract runs out, the PTSTA reverts to CTA status. If the PTSTA ceases to be a PTSTA for whatever reason, any contracts held by him or her will automatically fall to the TSTA contract holder who will be responsible for them.

Under exceptional circumstances a contract may be extended, by application to PTSC.

### 6.5 Cancelling a Contract

If either the trainee or the Principal Supervisor wants to cancel a contract during its duration, he or she must first come to an agreement with the other contracting party and then send the contract back to EATA, who will then inform the national organisation. Before sending the contract back to EATA, either the Principal Supervisor or the trainee, and preferably both, should write "Cancelled on (*date*)" and sign it. Some associations receive the cancellation forms directly from members and the forms are forwarded via the national association to EATA. **A contract is automatically cancelled if the trainee or the trainer does not renew their membership to EATA.**

### **6.6 Changing a Principal Supervisor**

Should the trainee wish to change his or her Principal Supervisor during the term of a contract, this can be done as follows:

- 1 The trainee normally agrees the change with his or her existing Principal Supervisor and with the future Principal Supervisor.
- 2 All three parties complete and sign the Change in Principal Supervisor form. Four copies of this form should then be sent to EATA's Executive Secretary or to the national association, (see section 6.2), along with one copy of the original contract, and, if necessary, any Exception or Expansion document.
- 3 EATA registers the change of Principal Supervisor, and one date-stamped copy of the completed form will be returned to each party.

Both the trainee and Principal Supervisor are free to change the Principal Supervisor arrangements if they wish. The whole process should be conducted from an I'm OK and You're OK position without prejudice to any party.

### **6.7 Changing/Adding Field of Specialisation**

- A. A CTA contract can be changed by cancelling the previous one and simply signing a new one in the new field in the usual way.
- B. **Adding or Changing a field at CTA level:** there is currently no alternative to taking all of the CTA exam in the new field and completing all the EATA requirements for the new field.
- C. A TSTA may change/add fields either by taking the TSTA examination in the new field or by following the Expansion route (see 6.9 below)
- D. A person who is a qualified CTA in two fields and wishes to take out a TSTA contract in both fields need only attend one TEW workshop.
- E. After a change of field by a PTSTA or TSTA, a sponsor may continue to hold existing contracts in the old field by automatic Exception'. No new contracts may be signed without going through the Exception process.

## **6.8 Exceptions for Principal Supervisors of CTA and TSTA Training Contracts**

### **6.8.1 Introduction**

A TSTA or PTSTA and a trainee may for some reason want to sign a training contract together in a field of specialisation in which the Principal Supervisor does not have qualified status. If this is the case the Principal Supervisor may apply for an Exception.

### **6.8.2 Definition**

1. An Exception is a specific permission given to a PTSTA or TSTA to sign a training contract in a field of specialisation in which they are not qualified.
2. An Exception is given to a Principal Supervisor for a single contract.
3. It does not confer the right to sign contracts within a field of specialisation as a whole.
4. An Exception may be granted if the trainee and the Principal Supervisor can provide good reason and the requirements are met.

### **6.8.3 Applying for an Exception**

The person applying for an Exception and the trainee must be members of EATA.

1. The Principal Supervisor and trainee should apply for the Exception at the same time.
  - The trainee should give good reason why he or she wants to sign a contract with the chosen Principal Supervisor. This will normally be the unavailability of an appropriate local trainer in the chosen field.
  - An additional endorsement must normally be obtained from a TSTA or PTSTA who is qualified in the candidate's field of specialisation.
2. The Principal Supervisor applies for the Exception offering evidence of his or her professional competence, qualification to work in and practical experience of the field of specialisation in which the candidate wants to qualify. This “Trainer’s verification of competency” is not needed if the Supervisor gives evidence that he/she has already obtained an exception in the relevant field. They have to specify also how many exceptions are still active in the field.
3. The Principal Supervisor submits a training plan, which becomes part of the training contract. In this training plan, the Principal Supervisor needs to:
  - give the name of the proposed Co-Principal Supervisor or give informations about how they will cover the training needs in the chosen field (see point 5 below)
  - say whether this is a CTA or TSTA training contract
  - describe who will be responsible for which sections of the training plan
  - show that EATA's training standards will be fulfilled
4. The Co-Principal Supervisor must:
  - Be someone who is qualified to teach and supervise in the field of specialisation of the trainee, so he or she will be accredited in the relevant field or have been granted an Expansion (see section 6.8)
  - Agree in writing to co-operate with the Principal Supervisor in the training process
  - Candidates have to have 30% of their training with the cosponsor.
    - For CTA’s this is a minimum of 15 hours of supervision with him/her and also 30% of their training must be with the co-sponsor.
  - Be a PTSTA or a TSTA for a CTA contract
  - Be a TSTA for a TSTA contract
5. In cases where no qualified person is available as Co-Principal Supervisor, PTSC may grant the Exception, without the Principal Supervisor having to fulfil the requirements of co-operation with a Co-Principal Supervisor. In this case, the Principal Supervisor must describe how they will obtain supervision and guidance from a TSTA in the chosen field.
6. Requests for Exceptions together with documentation (including the Exceptions Documentation Checklist – see 12.6.4) should be sent to the relevant PTSC member. A delegated member of the committee handles contract Exceptions on behalf of PTSC (see Appendix 1, EATA Newsletter and the website)

#### **6.8.4 Granting or refusing an Exception**

When the Exceptions and Expansions Officer receives the documents outlined above he or she will examine them and, where necessary, ask another member of PTSC or a TSTA or an experienced PTSTA from the field of specialisation for which the Exception is requested, to help him assess the application. If the exception is not granted he or she will provide feedback to the applicant, stating the reasons for refusal and indicating what the applicant would need to fulfil

before re-applying.

#### **6.8.5 When the Exception is granted**

1. If the request for an Exception is granted, the Principal Supervisor will receive a letter to this effect from the responsible PTSC member.
2. The Principal Supervisor and trainee should go through the normal contract filing procedure enclosing a copy of the letter of approval.
3. The training plan when agreed with PTSC is then an integral part of the EATA training contract and should be attached to the candidates EATA training contract.
4. The Training plan should be sent attached to the EATA training contract when applying for all examinations.

#### **6.8.6 When the Exception is refused**

If the request for an Exception is not granted the applicant may appeal to the Chair of PTSC. The applicant should write stating the grounds for his or her appeal. The Chair of PTSC will consult with the committee at its next meeting. The committee's decision will be final.

#### **6.8.7. Subsequent Exceptions**

Trainers applying for further exceptions in the same field need not send verification of competence. There is normally a limit of three Exceptions to be held simultaneously by a Principal Supervisor for CTA training contracts in a given field.

### **6.9 Expansions for Principal Supervisors of CTA and TSTA Training Contracts**

#### **6.9.1 Introduction**

Some TSTAs and PTSTAs may wish to expand their permission to train and to sign training contracts because of their professional background and experience in a field of specialisation other than that in which they are qualified. The Expansion procedure has been developed so that experienced Principal Supervisors do not have to go through the whole CTA and TEW procedures, although that remains an option. A PTSTA may apply for an Expansion two years after his or her endorsement as a PTSTA.

#### **6.9.2 Definition**

1. An Expansion is a general permission, given to a TSTA or PTSTA to teach, supervise, credit hours and sign training contracts in a category which differs from his or her field of specialisation.
2. An Expansion granted to a TSTA gives permission for him or her to sign CTA and TSTA training contracts in a field that differs from the TSTA's field of specialisation.
3. An Expansion granted to a PTSTA gives permission for him or her to sign CTA training contracts in a field that differs from the PTSTA's field of specialisation.
4. If a PTSTA applies for an Expansion, the PTSTA's Principal Supervisor must
  - a. be certified in the field of specialisation for which the PTSTA is applying
  - b. or have an Expansion for the field of specialisation for which the PTSTA is applying
  - c. or in unusual circumstances co-operate with a named TSTA who is qualified in the field of specialisation for which the PTSTA is applying, either through certification or Expansion, and who is jointly responsible for the PTSTA's training in the expanded category.

### 6.9.3 Applying for an Expansion

The person applying for an Expansion must be a member of EATA, and is required to demonstrate professional competence as a practising Transactional Analyst, Supervisor and Teacher in the field of specialisation for which the Expansion is required.

The applicant should submit:

1. An application for an Expansion, giving reasons for the request
2. A written statement, similar to sections A and B of the CTA Written Examination, but referring to the field of specialisation for which the Expansion is required. **This statement has to be anonymous.** It should consist of two parts:

*Part 1:* Professional Self-portrayal as a Transactional Analyst in the expanded field of specialisation, including

- i. a description, including examples, of the way the applicant works within the field of specialisation for which the Expansion is requested,
- ii. a description of the applicant's training philosophy,
- iii. a discussion of how his or her work in this field is similar to and different from his or her area of specialisation.

*Part 2:* A description of the candidate's professional experience as a trainer and/or supervisor in the expanded field, including, for example, personal experiences and details of giving workshops and/or lectures; supervising trainees and supervising projects. This will include details of extensive involvement in the training of at least two trainees.

(If English is not your first language, check with the PTSC member responsible for exceptions to find out if there will be an adjudicator who speaks your language and if you can submit your documents in this language.)

3. A letter of support from a TSTA who is certified in the field of specialisation for which the Expansion is required. If such a TSTA is not available, a letter of support from a relevant PTSTA may be accepted.
4. A photocopy of his or her Certification as a TSTA or of his or her TSTA Contract.
5. Either a photocopy of two CTA certificates in the expanded field gained by trainees whose contracts he/she has held by Exception or a copy of the applicant's Oral Exam Certification in the new field (in other words the applicant may choose to submit to the oral part of the CTA examination as evidence of his/her competence).
6. A photocopy of the Registration Fee.
7. The Expansions Documentation Checklist (see 12.6.5).

Requests for Expansions together with documentation should be sent to the relevant PTSC member. A delegated member of the committee handles contract Expansions on behalf of PTSC (see Appendix 1 or an EATA Newsletter or the website).

### 6.9.4 Granting or refusing the Expansion

When PTSC receives the documents outlined above, it will appoint a TSTA or an experienced PTSTA, from the field of specialisation for which the Expansion is requested, as an adjudicator to look at the written statement.

- The adjudicator will be asked to say whether, in his or her opinion, the written statement is acceptable or unacceptable.
- If the adjudicator judges the written statement to be acceptable PTSC will grant the Expansion.
- If the adjudicator finds the written statement unacceptable, PTSC will consult another TSTA or an experienced PTSTA, from the field of specialisation for which the Expansion is requested, and ask them to adjudicate in the same way.
- If the second adjudicator accepts the written statement they will be asked to discuss the case with the first adjudicator and come to a joint decision. If the decision is to accept, PTSC will grant the Expansion.
- If the second adjudicator does not accept the written statement, PTSC will not grant the Expansion.
- If no agreement is reached a third TSTA will be called as an adjudicator and the matter will be discussed at the following PTSC meeting.
- If the expansion is not granted, the adjudicator(s) will provide feedback to the applicant, stating the reasons for refusal and indicating what the applicant would need to fulfil before re-applying.

#### **6.9.5 When the Expansion is granted**

If the requirements set out in section 6.9.3 are met and the written statement is accepted, PTSC will grant the Expansion.

The successful applicant can assume the title of TSTA or PTSTA in the new field. If a PTSTA pass the TSTA exam the expansion will be automatically recognized also at TSTA level.

The successful applicant should then send a copy of the Expansion document to EATA's Executive Secretary.

#### **6.9.6 When the Expansion is refused**

If the Expansion is not granted the applicant may appeal to the Chair of PTSC. The applicant should write stating the grounds for his or her appeal. The Chair of PTSC will consult with the committee whose decision will be final.

#### **6.9.7 Variations in procedure**

The PTSC Chair and Committee deal with variations to the basic procedure. The name and address of the person who is currently handling Exceptions and Expansions is given in Appendix 1, in the EATA Newsletter and on the website [www.eatanews.org](http://www.eatanews.org)

#### **6.10 Documentation**

Certified Transactional Analyst Training Contract (12.6.1)

Teaching and/or Supervising Transactional Analysis Training Contract (12.6.2)

Change in Principal Supervisor (12.6.3)

Exceptions Documentation Checklist (12.6.4)

Expansions Documentation Checklist (12.6.5)