

# GUIDANCE ON HOW TO TRAIN AS AN EFT PRACTITIONER



**EFT & Mindfulness Centre**

International Training, Accreditation  
and CPD Providers. Est 2008

[www.eftandmindfulness.com](http://www.eftandmindfulness.com)

# Contents

<b>ABOUT EMOTIONAL FREEDOM TECHNIQUE (EFT).....</b>	<b>4</b>
<b>TRAINING.....</b>	<b>6</b>
<b>WHO IS THE TRAINING SUITABLE FOR? .....</b>	<b>6</b>
<b>ENTRY REQUIREMENTS .....</b>	<b>6</b>
<b>TRAINING PATHWAY (EXAMPLES ONLY).....</b>	<b>7</b>
<b>WHY SUPERVISION? .....</b>	<b>13</b>
<b>ALREADY IN SUPERVISION?.....</b>	<b>14</b>
<b>HOW LONG DO I HAVE TO UNDERTAKE SUPERVISION? .....</b>	<b>14</b>
<b>CONTINUOUS PROFESSIONAL DEVELOPMENT (CPD).....</b>	<b>15</b>
<b>WHAT COUNTS TOWARDS CPD? .....</b>	<b>16</b>
<b>GUIDANCE ON WHAT YOUR TRAINER WILL BE LOOKING FOR .....</b>	<b>18</b>
<b>RECOMMENDED SESSION TIMES.....</b>	<b>20</b>
<b>INFORMATION ON THE CASE STUDY REQUIREMENTS.....</b>	<b>20</b>
<b>HOW TO WRITE UP A CASE STUDY .....</b>	<b>21</b>
<b>SAMPLE CASE STUDY AT INTERMEDIARY LEVEL (2) .....</b>	<b>23</b>
<b>TEMPLATE TO RECORD CASE STUDY (INTERMEDIATE OR ADVANCED).....</b>	<b>28</b>
<b>SUPERVISION RECORD FOR PERIOD 1<sup>ST</sup> JANUARY TO 31<sup>ST</sup> DECEMBER EACH YEAR .....</b>	<b>30</b>

# Welcome!

Thank you for your interest in training in Emotional Freedom Techniques with an Master EFT Trainer, accredited by the EFT and Mindfulness Centre. All Accredited Trainers listed on our website have been trained to the highest standards and have completed rigorous criteria before being accredited. They are on hand to help and assist you through your training and development.

Here is a little background about our organisation and our CEO and Founder: Helena Fone set up the first EFT association and was the first to introduce a formal structure in training, EFT accreditation, CPD and Supervision for those who practice and train. She wrote the first accredited EFT training course with a core curriculum and wrote the first Master Trainer course to a Level 5 standard of education with the National Committee of Further and Higher Education. She also wrote the first acclaimed and best selling book 'EFT for Dummies' translated into 3 other languages. Having been involved with EFT since 2004 and met many well-known names in the world of EFT, Helena now utilises her wealth of experience to create a to build her organisation into a loving EFT and Mindfulness community!

The EFT & Mindfulness Centre is proud to have forged alliances with top professional organisations who understand and admire our professional approach to training and certification. Helena continues to lead the field in raising the standards of practice and training in EFT to create one of the world's leading training organisations. Being a member of the EFT & Mindfulness Centre is a mark of quality that will enhance the standing of your practice and training courses.

More importantly, we are friendly and supportive, always on hand to help you out and keep you up to date with any changes. We are always ready to listen.

To find a member, a course, free resources or information, please visit [www.eftandmindfulness.com](http://www.eftandmindfulness.com). Please [join us](#), we have so much to offer!

Thank you

## **Useful websites:**

If you're interested in training and progressing up to Trainer level in Mindfulness Based Cognitive please visit [this page](#) on the website.

Once accredited at EFT Practitioner level, you can apply for this pack to take into schools [www.eftineducation.com](http://www.eftineducation.com)

Whilst training, we ask you to join us as a student member: [www.eftandmindfulness.com/join](http://www.eftandmindfulness.com/join)

## About Emotional Freedom Technique (EFT)

Emotional Freedom Technique (or EFT) is a non-invasive, easy to learn tapping therapy which can be self-applied. When being used in a therapeutic manner, it should be administered by a competently trained EFT Practitioner in regular supervision.

You may hear EFT being referred to as 'meridian therapy', 'tapping therapy' or 'energy psychology'. It is often described as being similar to acupuncture but instead of using needles, the meridian points are gently tapped with the fingertips. EFT is a relatively new branch of complementary therapy that also utilises the mind/body\* energy system to bring about positive changes in emotions, thoughts and behaviours.

### What is the history?

EFT in its present form has only been around for about 20 years but its origins go back 1000's of years to acupuncture, acupressure and shiatsu. The earliest signs of acupuncture being used on humans can be traced back to 3,200 years BC.

### What can EFT help with?

EFT has been known to help with a range of psychological, emotional problems including physical symptoms. Below are some examples of its use:

- o As a self-help tool
- o For fears, phobias, traumatic memories
- o Can easily be incorporated into your current psychotherapy, reiki, counselling, hypnotherapy, psychology, massage and similar practices.
- o Can help with negative emotional, psychological and physical issues
- o As a stress management technique at work
- o To minimise symptoms of depression and anxiety
- o Use in schools to help reduce stress and anxiety
- o As a motivator when there are barriers to performing, communicating etc
- o Assist with relationship issues
- o Assist with pain relief
- o Beneficial for those who have bad habits such as smoking, nail biting, eating disorders etc.
- o Can be used in the voluntary field in hospices, schools, emergency units ...

## **What is the science behind EFT?**

Although clinical trials and studies have shown EFT to be effective for trauma, cravings, phobias, stress, and to alleviate pain and the side effects of cancer treatment, it has not yet passed the gold standard threshold to be regarded as an evidence based therapy. That does not stop medical professionals using it in their clinical practices,

Research has been carried out by professionals including Robert Scaer, M.D. Lawrence LeShan, Ph.D., Richard E. Worthington, Ph.D. Claus Bahne Bahnson, Ph.D, to name but a few; where we see more and more evidence that emotional trauma contributes greatly to disease.

Eye Movement Desensitisation and Reprogramming (EMDR) is a similar technique to EFT. EMDR has reached the minimum threshold for being designated as an evidence-based treatment. The latest NHS-based clinical trial (published in the Journal of Nervous and Mental Disease [2011]) compared EMDR to EFT for post-traumatic stress and EFT was shown to be as effective. It must be borne in mind that because there is still limited scientific evidence and differing theories as to how EFT works, there will still be some scepticism and resistance from those who need gold standard evidence. However, this doesn't deter some medical/mental health professionals from using EFT in their practice.

Adding the EFT designation to your qualifications from a professional EFT Trainer will let people know you are trained in a technique that is undergoing and meeting clinical research criteria.

For an abstract report on the latest findings on the efficacy of EFT, please click [HERE](#)

## Training

### Who is the training suitable for?

- Individuals with an interest in learning EFT for self-work
- Psychologists, Psychotherapists, Counsellors and all mental health professionals
- NLP Practitioners
- Medical professionals
- Academic professionals
- Teaching professionals
- Complementary Therapists (Hypnotherapists, Reiki Practitioners)

Those with a qualification in mental health or similar discipline will find this course particularly useful.

Before signing up to a full or part time career as an EFT Practitioner, here are some more answers to questions you may have.

### Entry requirements

EFT is not regulated in any country therefore at this current time, there is no registration or licensing requirement to practice as an EFT Practitioner, nor any formal entry requirements.

The EFT & Mindfulness Centre therefore imposes its own course entry requirements and criteria before offering certification. This is for the safety of its students and clients and this is respected by professional organisations. Background checks may be made prior to you being accepted on our courses.

**Trained elsewhere?** If you are coming to us to continue your training and have previously trained elsewhere, your Trainer will ask for evidence of training and competence and you may need to purchase our training materials so that you are properly aligned with our organisation's standards.

## Training Pathway (Examples only)

All of our courses can be delivered online but MUST have a live Trainer in attendance throughout. Live demonstrations must be given by the Trainer and students must be observed whilst participating in group practical exercises.

**From 1<sup>st</sup> December 2022** all Practitioner and Trainer certificates will display the Trainer's name but will be awarded by the EFT & Mindfulness Centre.

### FOUNDATION (Level 1)

#### **Entry criteria: Determined by Trainer**

A one day introductory course teaching you the basics of how EFT works. You will receive full instruction on how to use EFT and understand its background and relationships with other energy techniques; how to test; how to handle an emotional overwhelm; getting to the root of a problem and much more.

You will see live demonstrations followed by paired exercises designed to develop your EFT skillset. At the end of the course, you will receive an Attendance Certificate and a Student Manual.

#### **Sample content for Foundation (Level 1)**

The history and Background to EFT  
What meridians are and if they exist  
How does EFT work?  
What can EFT be used on?  
Tapping Points  
EFT Protocol  
Subjective Units of Distress  
Formulating Phrases  
Triggers and Aspects  
Core Issues  
Observing client response  
Testing Results  
How to use EFT on a range of low key emotions (fear, anger, sadness etc)  
Recognising an emotional overwhelm and how to deal with it (Abreaction)  
The neuroscience behind EFT  
How EFT can be used on a trauma and where not to go  
How EFT can be used for Cravings  
Borrowing Benefits  
Working on your own Issues

At the end of the course you will receive an Attendance Certificate and an EFT

Foundation Student Manual.

It is expected that having experienced EFT, you will want to continue to the Intermediate (Level 2) part of the course. Between courses, it is advisable to practice using EFT as often as possible on yourself and friends and family on minor issues. You are not qualified at this stage to practice EFT on others for payment but if certified/licensed, you can integrate it into your clinical practice.

## **INTERMEDIATE (Level 2)**

**Prerequisites: Level 1 EFT Attendance Certificate awarded by an EFT & Mindfulness Centre Trainer.**

This course can be delivered over min of 2 days and if delivered online, it can be delivered in a modular format spread over a week or two. The course is designed to build your confidence and take you to the next level of instruction. It will teach you how to understand what may interfere with EFT working; working with the client's belief system and how to create empowering phrases.

The course will cover instruction on how to work with a traumatic memory and you will learn the variety of gentle EFT approaches that can be utilised to keep a client safe. You will also learn what may get in the way of EFT working and how to work with physical problems.

You will see live demonstrations followed by paired exercises designed to enhance your skills. At the end of the two days, you will receive an Attendance Certificate and a Student Manual.

### **Sample content:**

- Additional tapping points and when to use them
- How to be creative with EFT Set up phrases to enhance results
- Recognising and working with Limiting Beliefs and how to collapse them
- How to use the table top metaphor
- How you can use Socratic questioning to get to the core issue
- Show to manage clients who have many aspects or switch aspects
- More ideas on how to test other than the SUD level
- What a cognitive shift is and how to recognise one
- Learning safety techniques to protect a client when working with trauma
- Exploring the Mind/Body Connection and EFT
- How to use EFT on a Physical Symptom that will get results
- How to use EFT on children and on animals
- How to work online with clients



At the end of the course, you will receive an Attendance Certificate and an Intermediate Student Manual

Following this course, you may decide to work towards **Practitioner certification**. You are encouraged to practice using EFT on yourself and friends and family. You are not qualified at this stage to perform EFT on others for payment until you have become certified at Intermediate (Level 2) Practitioner level (see below) but you can integrate it into your clinical practice. Once certified and accredited, you may host talks on EFT but NOT training courses.



## **INTERMEDIATE PRACTITIONER CERTIFICATION AND ACCREDITATION**

If you are interested in using EFT on others in a professional capacity or may want to in the future, then you will need to have a Practitioner Certificate.

**To become certified**, you will need to fulfil the following criteria **within 12months**. If you haven't been able to complete your Practitioner status, you will be asked to attend a refresher course.

1. Submit minimum of 3 case studies consisting of 3 sessions on 3 different clients to be submitted in either audio, written or video format or a mix. (Your Trainer will indicate which format). **Mandatory**
2. Sign up as a Student Member of the [www.eftandmindfulness.com/join](http://www.eftandmindfulness.com/join) **Mandatory**
3. Access the Online EFT test from the Member Area on the top right of the website. Full instructions are given before you begin and you may save the test and go back at a later date. **Mandatory**
4. **Engage in a additional practical EFT sessions** working with other experienced or student Practitioners. This could include some of the exercises used in the training course. This can also take place during Supervision. **(Optional)**
5. When you have completed your Trainer's criteria, you may be invited to a 1:1 post case study review session via Zoom or face to face where you will have the chance to ask questions and your Trainer will determine whether you are competent to be awarded Practitioner status. **(Optional)**
6. **Completion of the Core Curriculum Document** to confirm all teaching points have been covered, an understanding of what has been taught and be able to put into practice the core elements of the EFT training. Trainers can add to this document. **(optional)**

7. Your Trainer will then notify [admin@eftandmindfulness.com](mailto:admin@eftandmindfulness.com) of your name and the Practitioner status you have achieved. The Centre will award you with your Practitioner Certificate.
8. **Personal therapy** Sometimes we may notice that we still have a lot of our own 'baggage' that might get in the way of working effectively with clients who might trigger a response. We encourage all students to seek help internally or externally. **(Optional)**
9. **Insurance** is the responsibility of the each Practitioner and Trainer. The EFT&MC has notified many insurance companies of our accreditation criteria and have a sample certificate. Accredited members in the UK are eligible for discounted premiums from Balens. A list of insurance companies can be found [from here](#).

**You will be invited to become an Accredited Practitioner** which involves upgrading your status on the website and agreeing to the Ethical Framework Document.

Your Trainer will invite you to take part in Supervision.

**To maintain accreditation** you will need to:

1. Confirm you are practicing EFT on a regular basis
2. Confirm you are complying with the Ethical Framework Document which includes gathering supervision and CPD
3. Remain listed on the EFT & Mindfulness website as an Accredited Practitioner

**We do NOT charge for accreditation renewal.**

**ADVANCED (Level 3)**

**Prerequisites: Intermediate Level 2 EFT Practitioner Certificate awarded by the EFT & Mindfulness Centre (or your Trainer if prior to 1<sup>st</sup> December 2022)**

Many students find they need this course to gain insight into more advanced skills that takes them above and beyond many other Practitioners.

You will have the opportunity to discuss cases you've worked on since you took part in the Intermediate (Level 2) part of the course. You will also discover new powerful tools based on NLP techniques; learn techniques that enhance your results such as conflict and self sabotage; learn the deeper causes of illnesses and disease; how to introduce and integrate inner child work; how to work with clients who show no emotion and much more.

You will see live demonstrations followed by paired exercises designed to enhance

your skills. At the end of the two days, you will receive an Attendance Certificate and a Student Manual.

**Sample content:**

Origins and Evolution of problems  
How to use EFT with clients who display complex Resistance, Sabotage and Inner Conflict  
Advanced safety techniques to use when using EFT with a trauma  
How to integrate Parts Therapy  
How to integrate Inner Child Work  
Recognising and utilising Language Patterns  
How to Pre-frame and Reframe  
When and how to use Humour  
How Metaphors can provide insight  
How to use Meta Models with EFT  
How to use Submodalities with EFT to reduce the SUD levels  
Understanding the benefits of using EFT on Serious Diseases  
Using Imagery Techniques with serious diseases  
What is the Polyvagal theory and how does it fit in with EFT?  
How to recognise and work with clients who have difficulty with emotions including dissociation  
Discovering imaginative ways of using EFT  
Imaginary Tapping  
How to improve your Intuition  
Clinical measuring/screening tools to measure outcomes  
Boundaries and barriers that can impede the therapeutic relationship  
How to gain your Advanced Practitioner certificate

Following this course, you may decide to work towards Advanced Practitioner certification (see below).



**ADVANCED PRACTITIONER – CERTIFICATION AND ACCREDITATION**

Submit minimum of 3 case studies consisting of 3 sessions on 3 different clients to be submitted in either audio, written or video format or a mix. (Your Trainer will indicate which format). **Mandatory**

1. You should already be signed up as an Accredited Practitioner member on the [www.eftandmindfulness.com/join](http://www.eftandmindfulness.com/join) **Mandatory**
2. Access the Online EFT test from the Member Area on the top right of the website. Full instructions are given before you begin and you may save the test and go back at a later date. **Mandatory**

3. **Engage in a additional practical EFT sessions** working with other experienced or student Practitioners. This could include some of the exercises used in the training course. This can also take place during Supervision. **(Optional)**
4. When you have completed your Trainer's criteria, you may be invited to a 1:1 post case study review session via Zoom or face to face where you will have the chance to ask questions and your Trainer will determine whether you are competent to be awarded Practitioner status. **(Optional)**
5. **Completion of the Core Curriculum Document** to confirm all teaching points have been covered, an understanding of what has been taught and be able to put into practice the core elements of the EFT training. Trainers can add to this document. **(optional)**
6. Your Trainer will then notify [admin@eftandmindfulness.com](mailto:admin@eftandmindfulness.com) of your name and the Practitioner status you have achieved. The Centre will award you with your Practitioner Certificate.
7. **Personal therapy** Sometimes we may notice that we still have a lot of our own 'baggage' that might get in the way of working effectively with clients who might trigger a response. We encourage all students to seek help internally or externally. **(Optional)**
8. **Insurance** is the responsibility of the each Practitioner and Trainer. The EFT&MC has notified many insurance companies of our accreditation criteria and have a sample certificate. Accredited members in the UK are eligible for discounted premiums from Balens. A list of insurance companies can be found [from here](#).

**You will be invited to become an Accredited Advanced Practitioner** which you can add to your categories under which you can be searched for.

Your Trainer will continue to invite you to take part in Supervision.

**To maintain accreditation** you will need to:

4. Confirm you are practicing EFT on a regular basis
5. Confirm you are complying with the Ethical Framework Document which includes gathering supervision and CPD
6. Remain listed on the EFT & Mindfulness website as an Accredited Practitioner

**We do NOT charge for accreditation renewal**

**An Advanced Practitioner Certificate of Accreditation is required before applying for the Master Trainer part of the course.**



## WHY ACCREDITATION?

Accreditation by, and affiliation with professional bodies are a great compliment to any training school and we are proud to be accredited by the [IIC](#), the GRCCT and approved by [Balens Insurance Brokers](#).

Many Practitioners and Trainers may not realise how important accreditation actually is because it commits the Practitioner to undergo Supervision and continuously develop themselves professionally.

An Accredited Practitioner or Trainer is one who signs up to our Ethical Framework Document which includes a willingness to develop their competences through CPD and to undertake Supervision as well as maintain registration with the EFT & Mindfulness Centre.

Most insurance companies require sight of a Certificate of Accreditation and some organisations demand it. Even though some clients are not sure what it means, they will often seek out an accredited practitioner. Accreditation is an endorsement that you take yourself and your work seriously, that you are willing to be insured, undertake supervision and keep up with your professional development. All hallmarks of an ethical therapist.

Students who wish to take our courses and become accredited are more than welcome to join us. Even if you have not trained with us, we can provide you with details of how to become accredited. We are here to help so no problem is too big or small for us. We look forward to you joining our community.

**Note:** If you are certified part way through the year, please still complete the Supervision and CPD forms sent to you as the date you were certified will be taken into account.

## SUPERVISION

***From 31<sup>st</sup> December 2019, supervision must be taken with one of the EFT & Mindfulness Centre's Approved Supervisors. If you have another Supervisor, please discuss this with your EFT&MC Trainer.***

### Why Supervision?

What would you do if a client abreacts? Where do you start with a client who has had multiple traumas? Would you recognise a phobia? There is a saying "you don't know what you don't know" and this is true especially when working as an EFT Practitioner. EFT is a powerful tool and even if you are a trained in mental health, you should know how use EFT ethically to protect yourself and your client. All this cannot be covered in training so that is where Supervision is your ongoing training.

A place to feel safe, secure and to seek guidance. Our Approved Supervisors have all been specially trained to help and guide you to become the best you can be.

### **Already in Supervision?**

If you're already in Supervision that's great but does it relate to your EFT practice? If you're not sure, talk with your Trainer. If you are taking Supervision with a Trainer from another organisation, we don't want to cause you any further work but would ask that you please discuss with your EFT&MC Accredited Trainer in the first instance. We have specially trained Approved Supervisors who are fully trained and equipped to help you grow.

### **What is Required?**

We ask that Practitioners undertake supervision prior to, during and after being certified. Supervision should always be carried out whilst practicing. If you are accredited, supervision is **mandatory**.

Practitioners will be guided by their Trainer on the number of hours but we expect a min of **6hrs per year** from Practitioners. Trainers are expected to attend minimum of **3 supervision classes** a year and **6hrs per year** if they are newly certified (less than 3 years for a Trainer or have delivered less than 3 courses since being accredited).

**Group Supervision can be counted towards the 6hrs but we also recommend 1:1 Supervision if at all possible to get the most benefit. All attendees at group Supervision must contribute a question and participate in discussions.**

*“Supervision is an important part of CPD”*

### **How to Take Supervision**

Supervision can be conducted in a variety of ways, either on a one to one basis or as a group:

a) Face to face      b) Via Skype/Zoom      c) Over the telephone

Supervision can be Peer: (equal knowledge and understanding, usually between Trainers) Group: (where the lead supervisor is a Trainer and usually more experienced) or Individual 1:1 (with the student's trainer).

### **How long do I have to undertake Supervision?**

As long as you are practicing, you must undertake supervision – even if you're a student and especially if you're taking payment. No matter what your chosen approach to supervision is, it is important for it to be grounded in a competency

framework. You are encouraged to pursue further readings in order to identify or enhance your personal supervisory orientation.

Utilising the Dreyfus 5 stage Model of skill acquisition for EFT, it could look something like this:

- 1. Novice:** EFT Foundation Level (1) or EFT Intermediate Level (2) Student not yet certified but practicing using EFT on family/friends and occasional clients (min 3 per week)
- 2. Advanced beginner:** EFT Intermediate Level (2) certified Practitioner for min 1yr using EFT on min of 3 clients per week
- 3. Competent:** EFT Intermediate certified Practitioner for min 2yrs with an average caseload of 5 EFT clients per week.
- 4. Proficient:** Practicing, certified EFT Intermediate or Advanced Practitioner for min 3yrs with a regular caseload of approx 5 clients a week.
- 5. Expert:** Practicing, certified EFT Advanced Practitioner or EFT Master Trainer for min 5yrs with average caseload of 5-10 clients a week. As a Trainer, delivering min of 2-3 training courses a year.

**Note:**

The above assumes relevant competence levels have been achieved.

## **CONTINUOUS PROFESSIONAL DEVELOPMENT (CPD)**

**How many hours?** We gather hours and not credits or units. After you have been certified as a Practitioner, you will need to gain **30hrs CPD** on an annual basis from the date you were certified. If you are gathering CPD in your other work, this may be taken into account as long as it's relevant in your EFT practice. If you are accredited, CPD is mandatory.

There are a wide range of activities that can be counted towards your CPD. When deciding what to include in your CPD you need to consider how the activity will enhance your work as a practitioner and also how you can demonstrate that. CPD must include practical (hands-on) application of your discipline(s), where relevant.

### **What happens if I can't meet the CPD or Supervision requirements?**

There may be extenuating circumstances preventing you from completing your CPD/Supervision. Your Trainer is on hand to help you any way they can and may

offer you to downgrade until you're ready to return to practice or find alternative methods.

For those who reside and practice in rural or remote areas , it may be difficult to obtain CPD/Supervision hours. However, most CPD can be earned through distance learning, web-based activities, community practice etc whilst Supervision can be undertaken over the phone/Skype/Zoom etc. If there are any problems, please consult with your Trainer/Supervisor.

### **What if I am gathering CPD for another profession?**

Again, if it relates to your EFT practice, it can be counted. We do not want you to be overwhelmed by CPD so if you're not sure, your Trainer can help and advise you

### **What counts towards CPD?**

To help you decide, the EFT&MC now has a range of CPD Accredited courses/events that have been assessed as suitable for our members. You can find these under the Events section on the website.

It is acknowledged that EFT Practitioners are professionals, capable of making their own decisions about what best serves this purpose in relation to their own practice. When deciding what to include in your CPD you may want to consider how the activity will enhance your work as a practitioner and how you can demonstrate that.

Here are some questions which may help you to decide which type of activities would be of most benefit to you:

1. What do I need to learn from my post session review notes that will help me improve the service I provide to my clients?
2. How can I keep up with current trends, new techniques and good practice?
3. What do I need to progress to a higher level in EFT?
4. What do I need to know more about, should things go wrong?
5. How can I keep my client safe?
6. If I want to specialise in a particular area of practice, what types of CPD activities would be most useful?

***“Supervision can be counted towards CPD, but CPD cannot be counted towards Supervision.”***



## **Examples:-**

### **Group Based activity**

- Attending or delivering ANY related professional training that could reasonably be expected to add to a practitioner's competency
- Attendance at seminars, webinars, workshops and lectures which enhance your knowledge and skills as an EFT Practitioner/Trainer.
- Attendance at conferences or meetings which are dedicated to EFT or a discipline that will enhance your skills.
- Being an examiner, tutor or assessor
- Participating in EFT discussion groups webinars or teleconferences
- Attending or delivering ANY professional training (EFT oriented or not)
- Taking EFT into the community through taster sessions, workshops, demonstrations etc
- Group demonstrations, talks or exhibitions on EFT

### **Self directed Activities**

- Client case studies. writing up and reflecting on the Practitioner's own case studies and/or theory and philosophy of practice
- Personal study which could include following a formal programme of study either taught or possibly distance-learning.
- Reading such as articles in journals, books, newsletters or information online which provide learning you are able to put into practice in your work as a practitioner.
- Participating in any EFT research study.  
Writing articles or books on EFT which are published.
- Developing and sending out Newsletters
- Watching or making EFT You Tube/and other videos, DVD's , listening to CDs
- Making or taking part in EFT podcasts
- Translating EFT material into another language
- Documenting the integration of EFT into an existing practice
- Feedback/Evaluation forms from clients or students which you carry out about your work.
- Developing a specific application of EFT (e.g. for sports or business)

### **Supervision activity for CPD**

- Attending Supervision where you meet with other practitioners and learn from each other about best practice.
- Receiving guidance from your Supervisor which supports your learning and development.
- Receiving supervision which supports your professional development over time, against agreed objectives.
- Work shadowing where you are working alongside your Supervisor to enhance your knowledge and skills about your practice
- Being observed by your Supervisor over Skype/Zoom via filming etc to evaluate your practical approach with EFT.

## Personal Therapy

You are **strongly** advised to undertake some form of personal therapy during the first year and preferably thereafter. This is in the best interests of yourself and your clients. This should be recorded on the log/record sheet.

## Guidance on what your Trainer will be looking for

When marking a student's Case Studies, a Trainer will be critically evaluating it to see if you have grasped what you have been taught during the training course(s). They will be looking to see if you are demonstrating the knowledge, skills and competences required to be certified at the relevant level.

**Note 1:** The outcome of the session need not necessarily be a successful one – especially as you will only be conducting a few sessions. The important factor is how you demonstrate the techniques and skills you've been taught at Intermediate or Advanced level and how you use your judgement in selecting which techniques to use at which times during a session.

**Note 2:** It may be a good idea to submit a trial case study so you can establish what your Trainer is looking for. You may also want to refer to your training manuals.

In writing a Case Study you will be expected to demonstrate some (and not necessarily all) of the relevant following. Please refer to your competency document too.

- identify the particular feeling, memory, belief or situation that is a problem for the client
- agree on the goals/desired outcome;
- introduce any safety techniques;
- decide on the EFT techniques to be used
- indicate what phrases you used to bring about a change in the SUD level.
- ability to establish boundaries
- knowledge and understanding of principles, theories and techniques of EFT
- how you explained EFT to the client and how you initially demonstrated it to them.
- how you isolated issues to be worked.
- If any secondary gains were present and if so how they were addressed.
- what set-up affirmations were used and how you decided what words to use.
- the reminder phrases that were used.
- which points were tapped - a full sequence or shortcuts.
- the methods used to address the issues and why these were chosen.
- how the core issue was established
- if partial resolution of an issue occurred, what you did next.
- what testing methods you used
- whether there were any shifts of aspect or issue.

- whether there were any cognitive shifts.
- which questions were asked to reach deeper levels of issues.
- how affirmations were framed and reframed.

Make as many written notes as you can during your Case Study session or ask permission to record the session.

If you have any questions, consult with your Trainer/Approved Supervisor.

**Here are examples of the skills that your Trainer will be looking for at Intermediate Practitioner or Advanced Practitioner candidate level (they are not exhaustive).....**

**Questioning /assessment skills. Are any questions similar to those below being asked?**

- If there were one memory you could wipe out, what would it be?
- When you say that (phrase or word)...what do you feel?
- What does that feeling remind you of or what memory goes with that feeling?
- Where do you feel that emotion in your body right now?
- Is it OK to stay with that feeling while we tap?
- What SUDs level is it or how would you rate that?

**How is the Practitioner getting the information?**

- Is the client's body language being noticed?
- Are appropriate listening skills being used?
- Are appropriate questioning techniques being followed?
- Are they using the SUD/VOC scale

**Is the Practitioner demonstrating knowledge of EFT techniques by:**

- Being fully aware of 'triggering aspects', moving with each triggering aspect as it comes up but remembering to go back to the original aspect to check it's been cleared?
- Encouraging the client to be specific?
- Testing sufficiently to establish if the emotion has been neutralised?
- Observing 'cognitive shifts'?

**Is the Practitioner keeping the client safe by**

- Not contaminating the client's words
- Utilising any safety techniques
- Being respectful of the client in all ways

- Being non-judgemental.
- Being aware of anything they were triggered by during the session
- Explaining what the client feels now is a trigger and not what is happening now.
- Explaining how they may feel before and after the session
- Explaining confidentiality and boundaries
- Noticing any projections or counter transferences taking place?
- Is 'present' at all times with the client, giving them their full attention and focus?
- Prepared to admit if the client's issue is beyond their competence and refer on?

### Recommended session times

All session times should be limited to no more than 1hr or a little over if necessary to close down the session. First sessions usually include a consultation so add another 20-30mins approximately for this. For clients travelling some distance, they may want to have a double session in which case, include suitable breaks.

### Information on the Case Study requirements for Intermediate Practitioner and Advanced Practitioner level.

**For Intermediate Practitioner Level:** Students are required to submit a **minimum** of 3 Case Studies and 3 sessions with each client (**min 9hrs total**)

**For Advanced Practitioner Level:** Students are required to submit a **minimum** of 3 Case Studies and 3 sessions with each client (**min 9hrs total**)

### Notes

- Written case studies are usually typed in (say) Arial 12 font. Average length is 4 pages (no more than 6) on A4 paper
- Your Trainer may request case studies to be submitted in Audio or Video format. The cost of marking these case studies is at the discretion of the trainer and will depend upon the format they are submitted in.
- Whichever format the Case Studies are presented, they must be of a standard that demonstrates Knowledge, Skills and Competence at the relevant Practitioner level. Refer to the Competency Document.
- All Case Studies are to be submitted to your Trainer **within 12 months of attending the relevant training course or the date on the attendance certificate**. If there are any problems in this area, first speak with your

Trainer.

- Multiple issues and physical and emotional issues may occur in the same session. Remember: It is not necessary for a session to be successful: You can sometimes learn a great deal from analysing what didn't go so well. It is perfectly satisfactory to present a session in which you did not achieve complete resolution of the issues.

## HOW TO WRITE UP A CASE STUDY

**Below is an example of a case formulation you may wish to use. It is not mandatory to use this outline but it is preferred in order for your Trainer to be able to assess you.**

**Next you will see how one student wrote their case study up and then you will have a template to use.**

### 1. Background Information

The first section of your Case Study will include information from their Intake/Consultation Form or you can attach the form to your case study. You can include factors such as age, gender, work, health status, mental health history, drug and alcohol history, life difficulties et. Include coping skills they are using to address the problem. (Smoking to relax, avoidance to mitigate anxiety etc)

### 2. Explaining EFT and installing any grounding techniques

This can be where you explain what EFT is, how it works and ask for permission to use them as your case study – ensuring anonymity. Keep it brief. **You only need to include how you explained this in your first case study.**

Also explain how you can keep the client safe and establish what their safe place is in case they need to go there. This can be real or imaginary as detailed in your training. **You may need to introduce grounding techniques at different intervals.** It is a good idea to explain this here before the client begins to explain their problem. That way you can help minimise any anxiety or fear they may have about discussing their problem. Perhaps Tap 'n' Talk can be used before they begin.

### 2. Description of the Presenting Problem

In the next section of your case study, describe the problem or symptoms that the client has come with.

Describe any physical, emotional or sensory symptoms reported by the client. Thoughts, feelings, and beliefs/perceptions should also be noted.

If you are an Advanced EFT student or a mental health practitioner, you can include any clinical measurement tools such as PHQ9, GAD, HAD, SUD etc or diagnostic assessments that you used with all scores reported if you find this helpful.

### **3. Goals/Outcomes**

Clients and Practitioners need to be able to measure progress after a few sessions. This can be done at the **Review** stage where you ask a client whether they are reaching their goal/outcomes. An example of a successful outcome may be measured by achieving a client with a fear of flying being able to fly on a plane for example or their levels of anxiety have reduced on the SUD scale. An unsuccessful outcome may well be your greatest teaching moment; please describe what was learned from the session and what will be done differently in similar circumstances.' (See Sections below for more information on what your Trainer will be looking for.)

### **5. Beginning the Session**

You have explained EFT so now ask the client to explain in their own words when they are ready what the problem is (this should be related to the goals and outcomes).

Record the session here and include SUD ratings and some of the Set up phrases/Affirmations used. You do not have to record the session verbatim but to give your Trainer a good idea of how you used your skills and knowledge.

### **6. Finishing the Session**

Include here how you wound down the session and how the client felt. Remember, it is not necessary to have a successful outcome.

### **7. Future Planning**

Are future sessions planned? Does the client need to consult an external agency (Dr, psychiatrist, nutritionist etc). Are they being given any home assignment work?

### **8. Post session review**

At the end of each session and when the client has left, it may help to jot down brief notes which can help you later for your records and give yourself time for self-reflection. These post session reviews can also be brought up at **supervision**.

- How did I do?

- What worked well?
- What was getting in the way and what was the reason for this?
- What have I learned?
- How could I improve?

**PS:** It is also recommended to offer clients a review at around 3 weekly intervals to establish progress from your own and the clients perspective. Sometimes a rating of 1 out of 10 in terms of how they feel they are reaching their Goals with 10 meaning they have reached their Goal.

## **SAMPLE CASE STUDY AT INTERMEDIARY LEVEL (2)**

**Name of EFT student** Ann Smith

**Client Gender** GR(Female)

**Date of session** 16/5/2021

**Session No** 1 of 3

### **Background information from Intake/Consultation Form**

Please see consultation form attached.

### **Explaining EFT and any grounding techniques**

I explained to her I was an EFT student and that I would need her permission to use her case study for my trainer but her personal details would remain confidential. I explained briefly that EFT was like acupuncture but without needles and that it can reduce emotional intensity of a bad memory simply by tapping. It can also help with negative feelings. I talked about the effects of EFT (tingling, light headed, wanting to yawn etc) and to stop me if she felt too overwhelmed. I told her to correct me if I used any words that didn't fit with her truths. I showed her the tapping points on myself and asked if it was OK for me to tap on her\* and that later I would show her she could use EFT on herself. (\*Not all students tap on the client but will tap along with them.)

### **Description of Presenting Problem**

GR came for help with:

- Mother's death
- Resentment that GR's father was so selfish about his loneliness and doesn't appear concerned with how much GR misses her mother.
- Feelings of guilt that GR couldn't help her father.
- A weight problem.

- GR feels lonely even when she is with friends.
- Low self-esteem.

GR had seen her GP but wasn't prescribed any medication and was on a waiting list for counselling.

### **Goals and outcomes**

GR wanted to:-

- Lower stress/distress
- Improve her low self esteem
- Enhance and modify her current coping strategies

### **Beginning the Session**

I told GR we would be starting the session and if she was OK. She felt a bit nervous so we tapped on that feeling until her SUD went from a 7 to zero. I asked which one of the issues would she like me to help her with today. She felt that she would like to work on the death of her mother and her resentment and guilt towards her father.

I asked how she rated them both on the SUD scale (1 not bothered through to 10 extremely upset).

I asked which of these had the highest and lowest intensity. Her SUD rating was an 8 on death of her mother and 6 on resentment towards her father.

I then proceeded to work on the one with the lowest intensity (resentment towards father) to avoid distressing my client and so that she could see how EFT works.

She explained to me how he was, feeling lonely, crying, etc. and the way he never seemed concerned about HER feelings.

I decided to tap on the whole thing which rated SUDS 6

So I did a long rambling setup with me tapping on the KC point the whole time.

"Even though I feel guilty that I resent my father for his behaviour, and I think I shouldn't feel like this, I accept my feelings, deeply and completely " I can't remember what else I put in the setup but when the SUD went down, I moved her towards the thought that her father was acting in the only way he knew how and that she had done the best she could as he did at the time. She accepted my suggestion to forgive her father and then guilt came up about her feelings towards him.

We tapped on "Feeling guilty about dad." SUDS went from 6 to 3

Tapped on "Remaining guilt about dad" "I can either hang onto this guilt or let it go". I asked her if there was any benefit to the guilt and she suddenly said that she didn't feel at all guilty (and looked surprised!)

She then said she would like to deal with the memory of her mother's death.

I asked her to keep her feet on the ground, to choose a safe place and asked if she felt safe in the room with me. She said she was.



I thought it would be a good idea to use the “Tap and Talk” for this to avoid too much overwhelm. I briefly explained how this worked ‘like telling a story while we tapped on the emotional spikes. She called the scene ‘The Shock’ I asked her how many ‘spikes’ there were, and she said 3. These scenes lasted only a few minutes each. So I said we would concentrate on these short scenes.

At that point she was becoming emotional, and I could see she was going to cry so instead of asking her to go straight into it, I asked her to just tap on the title ‘The Shock. I guessed her SUD level was in the region of 9. So I tapped her KC point and told her to say.. “Even though I’m overwhelmed with emotion right now when I think of The Shock..... I want to remain calm.” Then I tapped on the sequence (no fingers or gamut) saying “The Shock” “I’m so overwhelmed just thinking of it” “I feel so emotional”

Note: All tapping throughout this session was top of head and shortcut sequence.

When she began to smile I asked how she felt now and she said OK. I asked if she felt able to continue talking about what happened and she said “yes”. I reminded her to let me know if she felt any severe overwhelm.

GR then started to relate the first scene in the movie. What happened was GR’s mother complained she was tired and GR was short with her.

The first emotional crescendo happened as GR said “She said she felt tired”. I could see her breathing became rapid and her face flushed.

GR said her SUDS level was 9.

I tapped on the KC “she said she felt tired but this is just a memory”

Tapped on Sequence approx. two rounds saying: “she said she felt tired” but SUD not going down.

I asked her where she felt this in her body and she said in her chest that it was tight. So I tapped the KC “I have this tightness in my chest saying those words “she said she felt tired”

Sequence: “Tightness in chest at those words”. I asked her to focus on the word “tightness” SUD not going down much.

I decided to reintroduce a set up phrase as the SUD was not going down.

“Even though mum collapsed in the street, and it gave me a fright, and I didn’t know what to do, I did the best I could, and I forgive myself and anyone else that might have contributed to this, and even though I feel I should have known, and I feel responsible for her death because I didn’t pay enough attention when she said she was tired, I know that I am only human and I can’t know everything and she has said she was tired many times before and how was I to know the difference this time” (I probably said a whole lot more but I can’t remember exactly what I said because its difficult to remember it all).

We then tapped 2 rounds on “She collapsed in the street” SUDS to Zero.

Then I asked her to say a number of things so that I could check that I had got rid of all the emotional intensity. I got her to repeat the following phrases and rate how true they were. I also observed her body language as she said them.....

"I feel guilty about mums death"	Not true
"It was my fault she died"	Not true
"I could have saved her"	She said.. "Well, maybe..."

So we tapped on "I accept I'm not a trained paramedic nurse and I did the very best I could". After a few rounds she was able to say "I could have saved her" and confirmed it was Not True.

I asked her to repeat it again, just to make sure there were no spikes left. She said. "I'm now very angry and sad". I asked which was the more intense and she said anger. We tapped on the anger of her not being able to do anything and then sadness came up with went from a 6 to a zero after 4 rounds.

After these rounds I asked how she felt. "Perhaps I could have saved her, but I will never know" She appeared very matter of fact and showed no visual signs of distress so I left it at that. This demonstrated a Cognitive Shift.

At that point I asked if she wanted to continue but she said she felt so much better.

The hour was almost up so I left her with a positive round of tapping and I gave her a sheet with the EFT tapping points on for her to practice on. I also told her a little about the healing crisis.

### **Finishing the Session**

At the end of the session GR reported that she felt a big weight had been lifted and she was more rational. I asked her to revisit the memories and her feelings of guilt. She reported these were not bothering her any more.

### **Future planning**

There is the Low self esteem to work on. We booked another appointment for a week's time.

On Thursday I received this email: "Thank you so much for Thursday night, I truly felt better as the evening went on. Next day I had feeling, "I didn't know why I bothered you"

A couple of times when I've spoke to my Dad, since Thursday night I have found myself getting a little upset but by the time the conversation finished I was in a relaxed state." I am looking forward to our next session."

### **Post session Review**

I realized I need to keep more focused as GR does tend to switch aspects quite quickly. I will remember with other clients to watch the time in future and bring the session to a close by ending with a nice positive round of tapping. I will mention this at my next Supervision session.

**The Techniques I used during the session have been submitted.**

## **TEMPLATE TO RECORD CASE STUDY (INTERMEDIATE OR ADVANCED)**

**FROM (Name of Student)**

**TO: (Trainer's name)**

**Date of session**

**Client ID and Gender**

**Session No (3 required)**

**Background information from Intake/Consultation Form or attach form**

### **Explaining EFT and installing any grounding techniques**

You only have to explain about EFT at the first session, but grounding/safety techniques may need to be explained at regular intervals, especially if you feel the client may abreact.

### **Description of Presenting Problem**

### **Goal(s)/expected outcomes**

### **Beginning the session**

### **Outcome**

### **Future Planning**

### **Post Session Review**

**Please tick any of the Techniques that you might have used or noticed during the session (please add any others)**

**Level 2**

<input type="checkbox"/> Tap and Talk	<input type="checkbox"/> Tearless Trauma	<input type="checkbox"/> Aspects/Triggers	<input type="checkbox"/> Apex
<input type="checkbox"/> Grounding/Safe Place	<input type="checkbox"/> Limiting Beliefs	<input type="checkbox"/> Secondary Gains	<input type="checkbox"/> EFT for pain or small trauma
<input type="checkbox"/> Choices	<input type="checkbox"/> Core issue	<input type="checkbox"/> Switching Aspects	<input type="checkbox"/> Cognitive Shift

**Level 3**

<input type="checkbox"/> Reframe	<input type="checkbox"/> Inner Child	<input type="checkbox"/> Socratic Question	<input type="checkbox"/> Sabotage	<input type="checkbox"/> Resistance
<input type="checkbox"/> Humour	<input type="checkbox"/> Stabilisation	<input type="checkbox"/> Argument Tapping	<input type="checkbox"/> Conflict	<input type="checkbox"/> Parts Work

**SUPERVISION RECORD**  
**FOR PERIOD 1<sup>ST</sup> JANUARY TO 31<sup>ST</sup> DECEMBER EACH YEAR**

**NOTE:** To retain accreditation, you will be asked for details of your CPD and Supervision. **Please submit your CPD and Supervision record details to [admin@eftandmindfulness.com](mailto:admin@eftandmindfulness.com)**

<b>NAME</b>	
<b>EMAIL ADDRESS</b>	
<b>STATUS</b> (Practitioner Trainer etc)	

**Practitioners: Min of 3 meetings or 6hrs per year with an Approved EFT Supervisor from date of certification.**

**Trainers: Min 3 meetings per year for first 3 years then min 1 per year**

<b>Date</b>	<b>Format (Group or 1:1)</b>	<b>No of Hours</b>	<b>What did you learn?</b>	<b>Name of Approved Supervisor</b>
	<b>TOTAL HRS</b>			

(Please keep this record for 5 years or for however long required by your insurance company for audit purposes)

## CPD RECORD FOR PERIOD 1<sup>ST</sup> JANUARY TO 31<sup>ST</sup> DECEMBER EACH YEAR

**NOTE:** To retain accreditation, you will be asked for details of your CPD and Supervision. **Please submit your CPD and Supervision record details to [admin@eftandmindfulness.com](mailto:admin@eftandmindfulness.com) before 31<sup>st</sup> January.**

<b>NAME</b>	
<b>EMAIL ADDRESS</b>	
<b>STATUS</b> (Practitioner Trainer etc)	
<b>NAME OF APPROVED SUPERVISOR</b>	

**30hrs. Recorded annually from date of certification. (Trainers and Practitioners)**

<b>Date</b>	<b>Type of CPD</b> (See App. A)	<b>No of Hours</b>	<b>How has this helped you as an EFT Practitioner/Trainer?</b>
	<b>TOTAL HRS</b>		

(Please keep this record for 5 years or however long required by your insurance company for audit purposes)