

UNIT

CH-H1 Assess the needs of the client

Elements of competence

- CH-H1.1 Evaluate and process requests for hypnotherapy
 - CH-H1.2 Prepare to assess the client
 - CH-H1.3 Assess the client
 - CH-H1.4 Agree action with the client
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Information about this unit

Summary

This unit describes the role of the practitioner in assessing clients' needs which affect their health, effective functioning and well-being. This involves evaluating requests for hypnotherapy and the initial information received on the client, whether it is provided by the client him/herself or comes from another source, such as a referral. In doing this the practitioner needs to consider whether it is appropriate to work with the client or not. The evaluation will include determining the urgency of the client's needs and the overall caseload of the practitioner, together with making the necessary arrangements for the assessment to take place. If the decision is made to see the client, the nature and purpose of the assessment is agreed with them and their needs identified. Some clients may be accompanied by a companion(s). Where this occurs the practitioner is expected to interact with the companion(s) in ways that are appropriate to the needs of the client and the needs of the practitioner. The subsequent assessment aims to determine the nature and extent of the client's needs and to agree a course of action with them. This may be to refer the client to another healthcare practitioner or to develop a hypnotherapy treatment programme or to decide that hypnotherapy is not appropriate for the client.

Who this unit is aimed at

This unit applies to any practitioner whose work aims to enable clients to improve and maintain health, effective functioning and well-being through hypnotherapy wherever they practise.

The clients may be seeking to improve and maintain their health, effective functioning and well-being. Equally, they may have no particular health needs or may have acute or chronic conditions, or be terminally ill. They may be new to hypnotherapy, new to the practitioner, established in that the practitioner has been working with them for some while or returning to the practitioner after a period of absence.

Principles of good practice

This unit is based on the premise that for effective assessment to take place, the practitioner needs to understand the clients' personal, cultural and social situation and the holistic nature of health, effective functioning and well-being. The practitioner must be able to communicate effectively with clients and any companion(s) and balance the information obtained initially with information gained during the assessment. As the assessment process often acts as a gateway to services, there is also a particular requirement for practitioners to monitor clients and evaluate the extent to which services are meeting the needs of the broad community. Where particular issues or incidents cause concern the practitioner is expected to alert their professional body, their employing organisation, or other relevant organisation.

Relationship to other units

This unit focuses on the assessment of clients' needs which affect their health, effective functioning and well-being and the evaluation of how hypnotherapy might meet those needs.

It is similar in content to unit 11.1 in the National Occupational Standards for Professional Activity in Health Promotion and Care but has been put into the specific context of hypnotherapy. It links with Units CH-H2 and CH-H3 in terms of implementing a hypnotherapy treatment programme.

Note: where "client" is referred to, read also "patient", "customer", "pupil" and "learner",

where "companion" is referred to, read also "representative", "partner", "relative", "friend of the client", "another healthcare practitioner" and "appointed chaperone".

Element CH-H1.1 Evaluate and process requests for hypnotherapy

Performance criteria

You will need to:

- (1) evaluate *requests for services* for their appropriateness
- (2) suggest alternative service providers to clients, where appropriate
- (3) *communicate* verbally or in writing in a manner, and at a level and pace appropriate to the individual
- (4) establish the client's *particular requirements* through sensitive questioning
- (5) determine the severity of the client's needs or the risk of their condition deteriorating
- (6) ensure that any fee structures, charges and different methods of payment are clearly understood
- (7) explain possible outcomes, charges and duration of services to the client
- (8) arrange a suitable time and location for the assessment and agree those who should be present
- (9) explain clearly the reasons for any delay between requests and assessment
- (10) record arrangements made for the assessment fully and accurately

Scope:

- 1 *Requests for services from:*
 - a) potential or current clients
 - b) someone acting on behalf of the client (e.g. a parent, carer or appointed person)
 - c) other healthcare practitioners
- 2 *Particular requirements in relation to:*
 - a) the client's personal beliefs and preferences and presenting issues
 - b) the client's age, sex and physical condition
 - c) communication differences
 - d) physical support and access
 - e) emotional, psychological and medical support

Element CH-H1.2 Prepare to assess the client

Performance criteria

You will need to:

- (1) ensure that the assessment environment is appropriate for the client and their needs
- (2) present a *professional appearance* and be prepared and fit to carry out the assessment
- (3) ensure that the equipment, materials, and surrounding *work area* are prepared and meet professional codes of practice, legal and organisational requirements
- (4) evaluate the client's *initial approach and manner* to assess their needs
- (5) introduce the client and any companion to those present and *confirm individual roles*
- (6) *communicate* effectively and in a manner which maintains client goodwill, trust, confidentiality and rapport
- (7) explain the nature, scope and duration of the assessment and any related interventions
- (8) inform the client of the records to be made and their right of access to these
- (9) encourage the client to ask questions, seek advice and express any concerns about the assessment
- (10) confirm the consent of the client, and where appropriate their companion, to the assessment
- (11) interact with any companion(s) of the client in ways that are appropriate to the needs of the client and to your needs

Scope:

- 1 *Professional appearance:*
 - a) own presentation including appropriate dress/uniform/adornment
 - b) personal hygiene
- 2 *Work area is suitable in terms of:*
 - a) ventilation
 - b) lighting
 - c) heating
 - d) level of noise
 - e) privacy

- f) accessibility
 - g) space
 - h) cleanliness and orderliness
- 3 *Initial approach and manner:*
- a) appearance
 - b) body language
 - c) behaviour
 - d) posture and gait
 - e) oral responses
- 4 *Confirm individual roles in relation to:*
- a) the client's identity
 - b) the companion's identity
 - c) the role which the client wishes their companion to have and the information the companion should receive
 - d) the identity and roles of any practitioners present
 - e) your own role
- 5 *Communicate using:*
- a) speech and language
 - b) actions, gestures and body language
 - c) space and position
 - d) the written word or illustrations

Element CH-H1.3 Assess the client

Performance criteria

You will need to:

- (1) respect the client's privacy and dignity throughout the assessment and ensure they are as comfortable as possible
- (2) position the client for effective interaction and to minimise risk of injury to self and discomfort to the client
- (3) conduct the assessment in a manner which encourages the effective participation of the client and meets their *particular requirements*
- (4) support the client to identify significant *aspects of their lives* and use this to inform the assessment
- (5) where possible determine any contra-indications or restrictions to assessment and take appropriate action
- (6) use *assessment methods* which are safe, appropriate to the *client's presenting condition* and comply with professional and legal requirements
- (7) systematically establish the client's needs and draw valid *conclusions*
- (8) seek advice and support from an appropriate source when the needs of the client and the complexity of the case are beyond your own remit or capability
- (9) halt the assessment at the request of the client or when the information obtained means that it is unsafe to proceed
- (10) inform the client when additional information is required and obtain their consent to obtain the information
- (11) ensure records meet organisational requirements

Scope:

- 1 *Particular requirements in relation to:*
 - a) the client's personal beliefs and preferences and presenting issues
 - b) the client's age, sex and physical condition
 - c) communication differences
 - d) physical support and access
 - e) emotional, psychological and medical support
- 2 *Aspects of the client's life to explore:*
 - a) history of the client's health, effective functioning and well-being (physical, emotional, psychological, spiritual) including any particular conditions,

- contra-indications, treatments and medication
 - b) lifestyle including diet, exercise and use of drugs
 - c) work or academic history
 - d) social and family history
- 3 *Assessment methods:*
- a) suggestibility tests
 - b) guided interview
 - c) questionnaire
 - d) subjective unit of distress (SUDS)
 - e) observation
 - f) personality profiles
 - g) depth scales
- 4 *Client's presenting condition:*
- a) behavioural
 - b) psychological
 - c) physical
 - d) fulfilment
 - e) habits that predispose to or aggravate the symptoms
- 5 *Conclusions in relation to:*
- a) balance across physical, mental, emotional, social and spiritual condition
 - b) all the client's signs and symptoms
 - c) relief and/or alleviation of symptoms
 - d) symptoms for which treatment is to be applied with caution

Element CH-H1.4 Agree action with the client

Performance criteria

You will need to:

- (1) explain the outcomes of the assessment clearly and in a manner, level and pace *appropriate* to the client
- (2) balance possible successful outcomes with any inherent benefits and risks and the legal duty of care to the client
- (3) inform the client of the content, level of *risk*, duration and projected costs of the proposed action
- (4) explain any *restrictions* to hypnotherapy and advise on unrealistic expectations
- (5) advise the client where hypnotherapy is unsuitable and enable them to seek other healthcare where appropriate
- (6) recommend and agree *action* to suit the client's condition and identified needs
- (7) record the outcomes of the assessment accurately and in sufficient detail to meet professional requirements
- (8) store the records securely

Scope:

- 1 *Appropriate explanation in terms of the client's:*
 - a) current state of health, effective functioning and well-being
 - b) personal beliefs and preferences
 - c) age and level of understanding
 - d) cultural and social background
 - e) awareness and understanding of their condition
- 2 *Risk in relation to:*
 - a) the nature of any subsequent hypnotherapy treatment programme
 - b) the client and their overall health, effective functioning and well-being
 - c) evidence from documented research and the success of the interventions concerned
 - d) the setting(s) in which interventions will take place
 - e) the practitioners involved
- 3 *Restrictions:*
 - a) human resources
 - b) cost
 - c) physical
 - d) technological

e) time

4 *Action could include:*

- a) develop a hypnotherapy treatment programme with the client
- b) further assessment
- c) refer to another healthcare practitioner
- d) no further action

Description of knowledge and understanding

You should know and understand:-

A Professional standards and codes of conduct

- 1 the professional standards and code of conduct for your therapy
- 2 the role of the professional body setting the rules and ethics of your therapy
- 3 how the rules and ethics of professional practice and codes of conduct apply to your own practice
- 4 why it is important to keep your understanding of professional rules and codes of conduct up to date
- 5 how to balance your own responsibilities as a professional with any organisational and contractual requirements

B Legislation

- 1 current relevant health and safety legislation and how it applies to your own work role
- 2 legislation relating to obtaining, storing and using information and supplying services
- 3 the importance of keeping your understanding of legislation up to date
- 4 how relevant legislation impacts on your own work

C Employment and organisational policies and practices

- 1 the roles and functions of the principal agencies within the health and social care sector
- 2 sources of information within the health and social care sector and how to access them
- 3 why it is important to respect the rights of clients

- 4 the extent of your own remit as a practitioner and the limits of your responsibilities
- 5 how your own role relates to other health and social care practitioners
- 6 the organisational requirements and restrictions relating to the use of resources
- 7 the range of resources and options available to meet the client's needs

D Communication and the professional relationship

- 1 how to achieve effective communication through observation, sensitive questioning and listening
- 2 how to adapt vocabulary, pace and tone of speaking to meet the needs of the client
- 3 what forms of verbal and non-verbal communication are available and how to use these positively
- 4 how to check understanding with the client by reading and using a variety of signals
- 5 how to position self and client to encourage communication
- 6 how to recognise and overcome barriers to communication
- 7 why certain environments can inhibit communication and how to minimise this
- 8 why it is important to encourage the client (and any companion(s)) to ask questions, seek advice and express any concerns
- 9 the nature of a professional therapeutic relationship and how to develop it with clients
- 10 how to respond to conflicting advice which clients may receive from different practitioners

E Work role and practice - reflecting and developing

- 1 why it is important to reflect on your own practice and identify any development needs
- 2 how to evaluate the effectiveness of your own actions and learn from experience
- 3 the information available on effective complementary healthcare and how to evaluate and use this information within your own practice
- 4 how the models and concepts in your area of practice have evolved and developed, how these tend to change with time and the similarities and differences

between different versions

- 5 how to develop links with other healthcare providers and the protocols for doing this
- 6 the extent of your own knowledge and competence and how and when to refer the client to another practitioner

F Confidentiality

- 1 the importance of recognising and maintaining the client's right to confidentiality
- 2 how to balance the client's rights against your responsibility to others
- 3 what to take into account when passing on information about clients
- 4 what the procedures and requirements on confidentiality, security and transmission of information are for your organisation and for any organisation that you may need to contact regarding a client
- 5 ways in which confidentiality may be breached and how to prevent this occurrence

G Consent

- 1 what is meant by "implied" and "informed" consent and the circumstances in which these may arise
- 2 the guidance given by your professional body on implied and informed consent and when written consent should be obtained
- 3 why it is important to ensure that clients have been given sufficient information to give or refuse consent
- 4 who holds responsibility for gaining consent and when this should be done
- 5 how informed consent may be obtained from clients who are unable to give the consent themselves and who has the right to give this consent
- 6 how to confirm that the agreements reached are likely to be in the clients' best interest
- 7 what the policies on consent, including any specific requirements under contractual agreements are for your organisation and for any organisation that you may need to contact regarding a client

H Practice management

- 1 why it important to protect client confidentiality

- 2 how to keep records to protect confidentiality and security of information
- 3 how to keep records so that clinical audit can be undertaken
- 4 why it is important to record all the necessary information in a format suitable for further use
- 5 who has the right of access to information held of records
- 6 why it is important to acknowledge and respect an individual's rights and dignity and ways of doing this
- 7 what circumstances may indicate a need for an escort/presence of a third party
- 8 who may act as a companion for the client and how to interact with them
- 9 what your legal and ethical responsibilities are in relation to the client's health and safety
- 10 how to maintain your practice in line with health and safety legislation
- 11 how to be supportive to the client (and any companion(s)) whilst managing time effectively

I Health, effective functioning and well-being

- 1 the concept of health, effective functioning and well-being
- 2 why it is important to recognise that the client's previous and present care may affect their health, effective functioning and well-being
- 3 how the psychological and emotional balance of the client may affect their health, effective functioning and well-being
- 4 the nature of illness and the impact this may have on a client's health, effective functioning and well-being
- 5 how signs and symptoms may be suppressed or altered by other factors such as medication, exercise, diet, drugs and how to obtain information on these
- 6 how the diet, lifestyle, physical, social, emotional and economic context in which people live affects their health, effective functioning and well-being
- 7 the importance of recognising conditions which may pose a serious risk to the client and when to seek immediate help or advice from other professional sources
- 8 how personal beliefs and preferences affect how clients live and the choices they make
- 10 the nature of disability and your role in working with those who have disabilities

- 11 how an individual's abilities and disabilities may affect the nature and form of support needed

J The scope and methods of complementary healthcare

- 1 the history, principles and development of hypnotherapy and its relationship to other healthcare
- 2 how to recognise those occasions when hypnotherapy may complement other treatments which the client is receiving
- 3 the circumstances when you may choose not to accept a client:
- hypnotherapy is unlikely to succeed
 - the client does not want to continue with treatment
 - you do not wish to provide the treatment
- 4 the circumstances when you must not treat a client:
- hypnotherapy is contra-indicated
 - other healthcare should be sought
 - you do not have the requisite experience or expertise
- 5 the range, purpose and limitations of different methods which may be used for different clients with different needs
- 6 how to determine the most appropriate method(s) for different clients and their particular needs
- 7 how to recognise conditions for which hypnotherapy is incomplete in itself and for which the client should seek advice from other sources
- 8 how to tailor treatment appropriately for each individual
- 9 how to judge whether self-care is appropriate for the client
- 10 the importance of giving clear and accurate instructions on self-care

K Hypnotherapy science

1 Anatomy & Physiology

a) Conscious and unconscious process

- the functions of the conscious and unconscious process
- the basic neural operation of the brain
- the difference between the analytical and creative functions of the mind
- short and long term memory – how this is stored
- false memory
- the impact of emotion on memory
- how memory corrupts

b) Stress response

- fight or flight
- the endocrine system and how this interacts with the brain
- how psychological response creates physical reaction and vice versa

c) Breathing

- characteristics of breathing
- how to recognise changes in breathing
- utilising breathing as part of the psychological response

d) Psychosis

- functional and organic psychosis
- how to recognise psychosis and the appropriate action to take
- appropriate referral action to take if confronted by psychosis

2 Induction, deepening and reviving techniques

a) Techniques

- direct, indirect, confusion, eye fixation, fractionalisation, trigger, metaphoric, physical induction techniques
- how to select appropriate technique(s) to suit the client
- how to recognise when not to use certain techniques and the possible consequences of using an inappropriate technique

3 Psychology

a) Theories of psychology

- the main theories of psychology e.g. psychodynamic, humanistic/existential, cognitive and behavioural
- how these influence your own practice
- the importance of keeping your own knowledge up to date

b) The therapeutic process

- how key theories and approaches to treatment can be utilised in therapy
- the difference between hypnosis and hypnotherapy
- how to be aware of and manage transference and counter-transference
- how to develop a working alliance with your client

4 Intervention methods

a) Methods

- the range of intervention methods which may be used, for example
 - direct suggestion
 - indirect suggestion
 - metaphor
 - neuro linguistic programming
 - eriksonian
 - analytical
 - cognitive behavioural
 - regression
 - mechanistic
 - self help (including self-hypnosis and tasking)
- the correct use of the different methods

b) Contra-indications

- how to recognise conditions that you cannot treat
- when and how to refer clients who are outside the scope of your competence

c) Abreactions

- induced and spontaneous abreactions
- how to manage appropriately both types of abreactions
- how to recognise the potential for hysteria
- how to respond to unexpected reactions

5 Ethical practice

a) Why advertising should be accurate and truthful

b) The importance of holding appropriate professional indemnity insurance

c) Client welfare

- The importance of ensuring the welfare of the client
- How to recognise and guard against client exploitation through improper use of information gained, extending the treatment unnecessarily, overstepping the boundary in the professional relationship

d) Continuing professional development

- The importance of maintaining your own development and keeping up to date with current practice in your profession

6 Interview and assessment techniques

- a) The importance of recording client information accurately and in sufficient detail to use for assessment purposes
- b) Why certain information should be obtained before treatment e.g. family history, medical history, personal details
- c) How to keep records securely
- d) The importance of fostering a rapport with your client
- e) How to utilise appropriate self-disclosure
- f) The different questioning techniques which may be used – open questioning and closed questioning, direct and non-direct
- g) The range of assessment methods which may be used:
 - suggestability tests
 - guided interview
 - questionnaire
 - subjective unit of distress (SUDS)
 - observation
 - personality profiles
 - depth scales
- h) How to select the appropriate assessment method for your client

L Assessing the client's needs and the appropriateness of hypnotherapy

- 1 how to provide an appropriate assessment environment for the client and the importance of doing so
- 2 how to select, prepare and use a range of equipment and materials that are needed to assess the client
- 3 how to prepare and present yourself correctly to carry out assessment
- 4 why it is important to introduce everyone present and confirm their role within the assessment process
- 5 how to clarify and confirm the client's (and any companion's) understanding of the assessment process
- 6 how to interpret the client's initial approach and manner and identify their needs
- 7 how to select and use different assessment methods effectively
- 8 the amount of time which each assessment method is likely to take to establish the client's needs

- 9 the importance of respecting the client's privacy and dignity and affording them as much comfort as possible during assessment
- 10 how to establish valid and reliable information about the client, determine its importance and formulate your initial hypothesis
- 11 the information which would confirm or deny your initial hypothesis and the reasons for this in particular cases
- 12 how to deal with inconsistent information gathered during assessment
- 13 the potential risks of various courses of action for the client and how to assess these realistically in terms of priority of need
- 14 the range of resources and options available to meet the client's needs
- 15 why it is important to acknowledge your own limitations and when there may be a need to refer the client on to other healthcare practitioners
- 16 why it is important to explain the reasons for any delay between requests and assessment