

What is an Employee Assistance Programme?

Employee Assistance Programmes are designed to assist company employees to deal more effectively with work issues and personal problems.

Companies invest in employee assistance programmes through which their employees receive a range of services including telephone and face to face counselling, critical incident response, information services and management support.

Employers report that employee assistance programmes help improve productivity, reduce staff sickness absence and prove invaluable in terms of management support.

Care First

Care First is part of Partnerships in Care Ltd., a leading provider of independent acute and psychiatric care in the UK. Consequently, all Care First services are quality-assured by extensive experience in workplace counselling and occupational health services and supported by the psychological and psychiatric expertise available within the group.

Care First services are available 24 hours a day, 365 days a year. We work with groups of employees ranging from 50 to 200,000 +, covering the whole of the UK and delivering a service worldwide. Services can be accessed in over 100 languages should the individual's first or most accessible language not be English.

Who's Who In Care First?

Directors

Executive Director	Jane Neal
Operations Director	Lesley Davidson
Clinical Director	Geoff Holmes

Counselling and Information Team

Counselling Centre Manager	Claire Faice
Clinical Supervisor	Sylvia Williams
Team Leaders	Nikki Jackson
	Louisa Chowen

Administrative Team

Administration Manager	Jane King
Reception and Invoices	Brenda Stubbs
Administration Assistant	Ana Piciorus
Clinical Administrator	Talia Robinson

Contacting Care First

By Telephone:

01452 623230

Dedicated Associate Counsellor Line

For your convenience we have established a Dedicated Associate Counsellor Line, which is staffed by the Clinical Administrator and Team Leaders 8.00 am – 8.00 pm Monday to Friday.

In busy periods or outside the times stated above, you are invited to leave a clear message on our Associate Counsellor Line, which will be dealt with the same day where possible, or certainly the next working day.

All administrative queries and first contact appointments can be dealt with directly by the Clinical Administrator on this line within office hours. This line is also the number to use when collecting referral information or to speak to your designated Case Manager.

01452 623200

Invoices & Finance

This is the main reception number for the Administration Team, for queries on invoicing. The finance section is staffed Monday – Friday, 9.00 a.m. to 5.00 p.m. and is backed up by voicemail out of office hours.

0800 174319

Urgent issues out of hours only

Should you have an **urgent issue** which needs discussion between 8.00 pm and 8.00 am or at weekends, please use the above freephone number. Please reserve this for matters of extreme urgency only as this is one of the numbers used by Care First clients to access the service. **If your matter will wait until 8.00 a.m. the next business day, please call then, using the dedicated Associate Counsellor line**

01452 623201

Fax Line

The fax number should be used **only** to send Care First information specifically requested by the Administration Team or your Case Manager.

By Email:

admin@care-first.co.uk

This email address is **only** to be used for updating your records, notifying us of your holidays and requesting stationery.

Case notes can be sent in using the on-line service on the Care First web site or they can be sent in by post.

invoices@care-first.co.uk

This email address is **only** to be used for forwarding invoices. The invoice is to be sent as an attachment and the subject heading is to be 'INVOICE'.

The Care First Clinical Team

There are various groups of professionals who comprise the Care First clinical team. Care First has permanent employees including: -

- **Telephone Counsellors/Case Managers**
- **Telephone Information Specialists**
- **Care First Consultants**

The Telephone Counsellor/Case Manager Team

The Telephone Counsellors are based in Gloucester, working a shift system to provide a telephone counselling service 24 hours a day, 365 days a year. All Telephone Counsellors have been trained to the minimum of Counselling at Diploma level, supported by substantial post-qualification experience. Our Telephone Counsellors are also Case Managers who are responsible for managing Associate Counsellors' work within specified areas of the UK.

The Telephone Information Specialist Team

Care First has a Telephone Information Specialist Team who work alongside our Telephone Counsellors. The Information Specialists are all Citizens Advice Bureau (CAB) trained and offer advice in any area on which a CAB would usually advise. They are often involved in supporting individuals when practical advice is needed alongside emotional support.

Please bear this in mind if, during the process of counselling, you become aware that your client may need specific information, e.g. childcare, eldercare, benefits, consumer rights, employment law, etc. The Information Specialist team are contacted by means of the same 0800 number clients use to access Care First. This is a telephone-based service only and its advantage over a local CAB office is that it is immediately accessible 8 a.m. to 8 p.m. Monday to Friday.

Care First Consultants

Care First has a team of permanently employed counsellors known as Care First Consultants. This team works throughout the UK providing face to face counselling, mediation, critical incident support and defusion. Care First Consultants also visit Associate Counsellors for premises checks.

Associate Counsellors

The Associate Counsellor (AC) is part of the UK-wide network of counsellors with whom Care First contracts to work on an “as needed” basis. When contacted, the AC takes referrals for short term counselling. Following a thorough telephone assessment, with a telephone counsellor, if short-term work is thought to be appropriate, face to face counselling sessions may be offered (with an Associate Counsellor), usually up to a maximum of 6. The number of sessions offered will depend upon the particular contract, and you will be advised of this from the outset. We ask you to remind the client of the number of sessions available when you meet for the assessment. This figure will have first been mentioned at the point of telephone assessment.

If short-term work is not considered appropriate then the client will be referred to another suitable agency. At times a referral may be made, requesting that the AC offers some interim support and containment to the client whilst other local resources for longer-term counselling work are explored.

Care First works with an ethos that there is almost always something useful that can be done with a client in a brief therapy relationship even when there are clear indicators that longer-term therapy is appropriate. The Associate Counsellor’s skills in assisting the client to explore options for longer-term counselling are crucial in this work.

The Associate Counsellor needs to have a good awareness of local counselling organisations and other counsellors who may be able to meet the client’s longer-term need. We ask that you offer options to the client in these situations rather than making recommendations, to allow the choice to be with the client.

At all times the Associate Counsellor liaises with his/her Case Manager, as his/her primary Care First contact.

Whenever a case is referred to an Associate Counsellor, the case reference given will be five letters, followed by six of numbers. The letters denote the Care First counsellor making the referral, and the computer generates the numbers. The case reference does not denote who the Case Manager is therefore, should you be in any doubt at all regarding your Case Manager, please contact the Clinical Administrator.

The Referral Process

When a Telephone Counsellor decides to refer a client for face to face counselling, s/he will locate an Associate Counsellor in the correct geographical area and contact that counsellor.

The Telephone Counsellor will leave a message on your answer-machine if unable to reach you directly. The message will ask you to contact Care First as soon as possible to collect details of the referral. Alongside the client details, we will supply you with a Case Reference number and a Purchase Order number, both of which must be stated on all paperwork – case notes and invoices – related to that client.

Once you have contacted the client and arranged a first appointment, it is important that you contact the Clinical Administrator (01452 623230) to give us the date and time of the appointment. Failure to do so means that time will be wasted 'chasing' you for this information; your efficiency and ours will be impeded.

If you are unable to make contact with the client within 48 hours, please let us know and a decision can be taken regarding whether we ask you to continue trying or whether we take the referral back and discuss other options for the client.

In making arrangements with the client, should you find that s/he has difficulty in travelling to your premises or raises objections to the distance, please let Care First know immediately and we will take responsibility for helping the client with these difficulties.

The Care First service standard is that clients will be offered a face to face counselling appointment within 5 working days of contacting Care First. Please be clear at the point of referral if you do not have the appointment availability to offer this. If the mutually convenient time you agree with the client is outside this time boundary, please mention this when confirming the first appointment with Care First.

Formal Management Referrals

A number of Care First's customer organisations use a formal management referral facility to refer clients for counselling.

This involves the client's manager making a written request for Care First to provide counselling to a staff member. There are a variety of circumstances in which a formal management referral may take place. For example if the employee has been involved in a traumatic incident at work, if they have a drug or alcohol issue or if a more general issue is affecting their work performance.

These referrals are always viewed as supportive to the employee by the referring organisation and Care First. Before making a referral, the referring manager will discuss with the client the reasons for the referral and will gain the employee's consent to the referral.

Part of the management referral process will include regular feedback from Care First to the customer organisation. This feedback will include whether the client has attended the sessions and may also in some cases include a written report, which is sent to the customer organisation. At the point of referral, the client is always made aware of the nature of feedback, which will be provided. When a written report is compiled, the client is always part of this process and they will sign the report to agree it is a true reflection of the counselling provided.

If a written report is required, then you will be asked to complete this with the client in the last session of counselling. These reports are written in a pre-agreed format and you will be made aware of the need for this when the client is referred to you.

If you have any questions about a formal referral, or if you find a client reluctant to cooperate with the process, please speak to your case manager. Please note that a closure report is invalid without the client's signature, which gives his/her consent for the report to be sent to the referring manager.

CounsellingThe Care First Approach

When Care First telephones an Associate Counsellor with a referral, a Telephone Counsellor will already have assessed the client. Part of this assessment is to establish whether the client can be helped by short-term focused counselling.

At your first session with the client you will again be assessing whether you can work in a short-term focused way with this client. If you have any doubts about the viability or focus of the work, please telephone your Case Manager immediately.

When writing your case notes you need to be aware that they may at some point be required in a Court of Law. Care First is receiving an increasing volume of requests from clients for access to their case notes to support complaints, insurance claims or sometimes criminal investigations.

Your notes need to be clear, accurate, professional and respectful to the client. Please do not diagnose any conditions, e.g. depression/PTSD. Please describe the symptoms as presented by the client without assigning a 'label'.

The notes are Care First's only real indication of the nature of the work taking place, hence we ask for the notes to convey sufficient information to allow the Case Manager to understand the content and progress of the work. A Case Manager may ask for more (or occasionally less!) information to be written up if s/he is unable to get a good sense of the work.

You will find on pages 27-31 some sample case notes which will give you a guide concerning how much detail we would expect to see recorded in case notes.

Clinical Guidelines

Confidentiality

Care First adheres to the BACP Ethical Framework on confidentiality. Confidentiality may be broken only when the client is considered to be a danger to others or to the organisation for which s/he works, or where there are child protection issues evident.

Confidentiality is within Care First – please remember that all clients referred to Associate Counsellors remain Care First clients and we hold ultimate responsibility for the work carried out. **Always** consult with your Care First Case Manager, Team Leader or our Clinical Supervisor if an issue arises which may require breaking confidentiality. Care First would then negotiate such an issue and the appropriate way forward. Associate Counsellors are not required to take such action themselves.

If you are told of an issue that potentially requires the breaking of confidentiality, always advise the client that this is the case and encourage him/her to be part of the process of disclosure.

If you are told of something that requires immediate action, i.e. a bomb or similar act of terrorism, please dial 999 and advise the police, giving a factual statement of the information you have received. In any emergency **always** contact Care First, using the free phone number 0800 174319. **In all cases requiring a break of confidentiality please keep precise case notes.**

Police

If someone claiming to be a police officer contacts you **do not provide any information**. Please ask the officer's name and the telephone number of the police station. Advise the officer that a senior member of Care First's staff will call him/her back. Please pass on the information immediately to the Care First office. We cannot obstruct the law but we must protect the confidentiality of our clients should the situation be a hoax.

Third Party Contact

Associate Counsellors should never contact a third party on behalf of the client, e.g. GP or Employer. If you have any concerns please discuss these immediately with your Care First Case Manager, Team Leader or Clinical Supervisor. If the client needs specific support in providing a brief written report to his/her GP, for example when needing to access therapeutic resources via the NHS, please guide the client to write to the Clinical Director at Care First to request such a report (a Care First Client Report). Whenever possible, we prefer a client to take personal ownership of this communication with the GP. Any report written will be sent to the client for onward transmission to the third party.

Client Information Sheets

Care First provides an information sheet, 'What you can expect from Care First' which is to be handed to the client at the first session. You will be advised at the point of referral the number of sessions available to your client. Please ensure this is clarified at the assessment session.

‘Client Evaluation of Care First Services’ Forms

These forms will be issued to you together with a freepost envelope, please give these to your clients for them to evaluate our service should they wish to.

Management Referrals and Associated Feedback Forms

A number of Care First customer organisations make formal management referrals of their employees. These referrals incorporate additional documentation. At the outset of the process the employee agrees with his/her manager to engage in counselling and that brief feedback concerning the issues will be agreed between client and Associate Counsellor. In such instances a proforma will be mailed from Care First to you and part of the final session will need to be given to establishing brief feedback relating to the outcomes of the counselling process specifically related to the issue(s), which prompted the management referral. The proforma should be returned to Care First.

Be assured that, in each instance, the client will have agreed with his/her manager at the outset their willingness for feedback to be given. The extent and nature of the feedback is subject to your discussion with the client, should be completed within the session and is signed by you and the client. If you have any questions about this process, please speak to a member of the clinical team at Care First.

Spacing of Sessions

Care First prefers that your sessions are arranged on a weekly basis – at most two-weekly. We find that the therapeutic value of brief therapy is diluted if the sessions are stretched over a longer period. Likewise we prefer that the last session follows in this sequence – and not “left over in case the client needs it”. This latter style does not allow for the ending to be worked with as part of the short-term model. If you have a specific reason for delaying a session beyond two weeks, please discuss this with your Case Manager.

Telephone Support

If a gap between sessions is unavoidable due to either client or counsellor unavailability for counselling sessions, please remember that 24 hour telephone support is available each day of the year via the free phone number (0800 174319), which may provide a useful brief intervention should the client need this. This facility will also be usefully reinforced with clients reaching the end of their Care First counselling where they may be awaiting a referral for other therapeutic work.

Should the client use this facility while engaging with an Associate Counsellor for contracted work, we will offer support and containment. However we will not engage in a counselling process or in any way interrupt the agenda to which you are working.

Extra Sessions

You will be advised of the number of sessions any given client is allocated at the time of referral. Only in very exceptional circumstances are extra sessions agreed, and then only after consultation with your Case Manager, when a very clear focus and purpose for the extension has been established. Even if a client indicates his/her employer is willing to support further sessions, please contact Care First to check whether any such agreement has been made. If you are reaching the end of counselling sessions and you believe your client is unstable or has acute needs, please discuss these issues with your Case Manager who will explore with you the options available to the client. **Please do not encourage clients to request additional sessions from their managers. Such requests can cause difficulties for all parties**

Missed Sessions/ Did Not Attends 'DNA's'

If a client cancels with less than 24 hours' notice, s/he will lose the session and you may charge a half-fee. Cancellation with more than 24 hours' notice allows you an opportunity to rearrange the session and a fee is not chargeable for the cancelled session. **Care First will not meet the cost of reinstated sessions, except in the situation of an exceptional need discussed and agreed by a member of the Care First Clinical Management Team.**

Private Work

The Care First Contract **does not** allow for Associates working with clients on a private basis after the short-term work has finished. There are no exceptions to this rule.

Couples Work

Some of the Care First Contracts allow for couples work. If this is the case you will be told that it is couples work at the time of referral. Please do not invite partners or spouses to join an individual during your contract with that client. When the referral is for couples work, all sessions **must** be with the couple together. The Care First model is not to split the couple within the contracted sessions. Care First fees are increased by 50% for couples work.

Vulnerable Clients

You may become aware that some clients are especially vulnerable at certain times, e.g. bank holidays, anniversaries, etc. Do please remind them that they can ring the 24-hour helpline at these times. The Telephone Counsellor who responds to the client will not engage in the development of the therapeutic work you have established as the Associate Counsellor, but will offer immediate support to help contain the client's anxiety and deal with the situation there and then.

Access to Case Notes

Clients may access their case notes under the Data Protection Act. This request is subject to an administration charge. Clients may also request a brief report of their counselling sessions with no charge. Requests for either notes or a report should be submitted to the Clinical Director in writing.

Invoicing and Payments

Invoicing

We have flexible arrangements for Associate Counsellors invoicing Care First that will meet your needs and ours. The choice is with you regarding how often you submit an invoice. You may invoice following each client session, on a monthly basis or when you complete and close a case. Our requirement is that we have received and checked case notes prior to agreeing payment of an invoice, which relates to those sessions.

Final invoices for cases must be submitted within one month of the last session. Invoices submitted outside this time frame present difficulties with our audit processes and incur additional monitoring and checking procedures. Please complete the total process of each case by submitting invoices promptly in order to avoid delayed payment or even non-payment.

All invoices must incorporate the following information:

- Associate Counsellor name and address
- A clear indication of to whom the cheque is to be made payable
- Client reference (computer generated code)
- Purchase order number
- Dates of all sessions and DNA's

Please ensure all invoices include the above or payment will be delayed.

Please note that payment is not available for telephone sessions carried out by Associate Counsellors.

Final session invoices will not be passed for payment unless a final case note **and** closure note are received.

A sample invoice is enclosed for your information. (See page 32) An A4 format invoice is preferred by Care First. An invoice may be submitted by e-mail if you choose to. Please send it to invoices@care-first.co.uk and make the subject heading 'INVOICE'.

Payments

The administration team are committed to processing your invoices in a timely manner. At present we are able to process straightforward invoices on average, within 3 days of receipt. The invoices are then sent to the accounts department to be included in the next available BAC's run. You will receive payment 30 days from receipt of your invoice.

Associate Counsellor Fees

The standard Care First counselling fee is £35 per session and £52.50 for couples work, with a 50% fee payable if clients do not attend or cancel within 24 hours of the appointment time. In some exceptional circumstances a different fee has been negotiated to match specific situations. If you provide Specialist Interventions a specific fee structure will have been agreed.

Should you have an issue regarding fees, please contact the **Counselling Centre Manager** in writing. Please do not write advising us of a change in your fees prior to discussion with us, as any changes agreed will always be as a result of discussion and negotiation.

Care First Practice and Procedures

Submitting Case Notes to Care First

Care First have now launched an on-line service enabling you to send case notes to Care First through our website, www.care-first.co.uk

Online submission of case notes is our preferred method but exceptionally, some Associate Counsellors may send in paper case notes. All stationery items are available as paper copies.

It is a very simple process that will ensure confidentiality, and ensure a speedy receipt of Assessment Forms, Case notes, DNA's and Closure Forms. This development also ensures that case notes are not lost through the Royal Mail, which can cause delays in the closure of cases and the payment of invoices.

This process will also cut down on costs and resources such as stationery, printing and postage, and all Associate Counsellors can send case notes to us without leaving their consulting room, if they so choose!

Please take a look at the User Guide detailed below which explains the On-line Case Notes process step by step. The User Guide is also available on the Menu Section of the On-line Submission screen.

Care first Online Case Notes Management - User Guide

Logging On

Log on to the Care first Case Notes Management system by going to www.care-first.co.uk

Single-click the login link at the top of the screen, then choose 'Counsellor Area Login'

A black screen now appears asking you to identify yourself. Enter the username and password and press 'Access Server'.

> I need or have forgotten my username and password!

Please contact Admin on 01452 623200 between the hours of 9am and 5pm.

The Menu Screen

Care first

Case Notes Management - Online Submission

Counselling Sessions

- Assessment Session
- Case Note
- DNA Notification
- Closure Form

Specialist Therapy Sessions

- Assessment Session
- Case Note
- DNA Notification
- Closure Form

Critical Incident Sessions

- Case Note

Professional Support Sessions

- Case Note
- DNA Notification
- Face to Face Sessions Log

For assistance, please call the admin team on 01452 623 200

News
No news found

Links
AC Handbook

[Logout](#)

There are three areas on the menu screen: The main menu showing different forms you can submit, News and Links.

The Menu Section

Depending on the type of counselling you provide with Care first, this section of the Menu Screen will display up to 4 sections. Each section contains a list of the different types of documentation you may wish to submit. Just single-click on the form type you wish to submit.

Filling in a Form

Each of the forms has a number of mandatory and non-mandatory fields. Mandatory fields can be identified by the small blue asterisk, which follows the field name.

Date of Session *	<input type="text"/>
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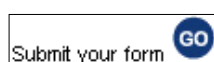
You will not be able to submit your form until all of the mandatory values have been entered.

Some of the date fields have a 'Today' link underneath them, which enables you to fill in today's date with a single click.

On some of the forms, certain fields are hidden when the form is first loaded and are only revealed when other fields are filled in. In some cases, different fields may appear depending on which value is entered in one of the previous fields.

Please fill in as much detail as you are able, referring to the Associate Counsellor handbook you were provided with for guidance about the type of information to enter. This handbook is available in the 'Links' section of this website (see above).

Submitting a Form



When you have filled in all of the relevant information and are ready to submit your form, single-click the 'Go' button at the bottom of the form. You will be asked whether you are sure you wish to proceed. If you have been interrupted during the entry of the information and the form has been open for more than two hours, you will be asked to re-enter your username and password before proceeding.

Please be aware that once you have submitted your form, you will not be able to go back and edit your submission.

If you have missed any mandatory fields, the system will prompt you to fill these in before submitting the form and highlight them in red to make it clear which fields need to be completed. The system will also check to make sure dates have been filled in correctly, and reference numbers have been entered in the correct format.

Once the form has been fully validated, it will be submitted to the system. At this stage, your completed form is displayed for you to print for your records, if required. You can either single-click the 'Print' link in the top-right hand corner of the screen, or choose 'File', 'Print' from your menu bar.

You can now use the links at the top or bottom of the page to return to the Main Menu if you wish to submit another form, or to Logout if you have finished. However, once you have submitted your form, you will not be able to return to it again.

The Menu Screen (continued)

The News Section

This section will be used to display any new information useful to the users of this system. News items, which you haven't read, should appear in the colour Red. You can hold your mouse cursor over the news item to see a preview of the news, or single-click the item to read it in full. To return to the main menu, simply click the 'Main Menu' link at the top or bottom of the news page.



The Links Section

This section will be used as a library for supporting documentation. To see a description of the link, hold your mouse cursor over the link title and a short description will appear in a 'pop-up' box. To view the document, just single-click on the link title.

The Care First Admin Team are at your service to help and assist with any queries that arise. Please don't hesitate to call us on 01452 623200 no matter how small the query is. This line is available 09.00 - 17.00 Monday to Friday.

Following each client session it is important that you return a case note to Care First within 48 hours. If a client has not arrived and you are claiming a half-fee for the session, a DNA Notification is required to substantiate your request for that fee. (Page 23 for example)

The assessment session requires completion of the First Session Assessment form. A separate case note is **not** needed. However, when seeing a client for a final session we require a **session case note and a separate closure form**, which provides an overview of the whole counselling process. (Page 24 for example)

Please return all documentation promptly. It is not acceptable to hold all the notes until completion of the case; we need case notes as the sessions take place. The Case Manager's task is to review the notes with the purpose of gauging whether the notes demonstrate that there is effective brief work taking place and also to offer any additional support from a Care First perspective which may assist the Associate Counsellor and the client work. If, exceptionally, you are using paper case notes, these should be returned to our **full postal address** and not in the freepost envelopes. The freepost envelopes provided are to be used only by the client to return his/her evaluation forms in confidence to Care First. The postage costs linked with returning case notes are the responsibility of the Associate Counsellor. Please ensure that the correct postage is on all correspondence.

Freepost envelopes can take up to a week to reach Care First. Whilst this is acceptable for evaluation forms, we need case notes and invoices to arrive promptly.

Supervision

Please ensure that your supervisor is willing to supervise short-term work. If you have to persuade your supervisor of the value and methods of short-term work, perhaps this supervisor is not appropriate for this style of work! A reference is sought from your supervisor as part of the Care First application and recruitment process.

Insurance

It is your responsibility to obtain and keep up-to-date your own professional liability insurance. **Care First needs to have on file at all times a photocopy of your current cover.** If this document is not provided in a timely way we will need to place you on 'holding' as an Associate Counsellor until we have the required document.

Premises

Care First has agreed with the contracting companies that clients will be seen in a professional setting. If the room in question is part of your home, there must be a clear demarcation between the domestic and professional. Counselling rooms should not 'double up' as rooms with a domestic purpose. It is Care First policy to inspect the premises and you should expect to be contacted in this regard.

Care First's Quality Plan incorporates certain criteria for premises at which clients are seen. Please give due consideration to these criteria:

- Accessibility by public transport
- Accessibility by car – are the premises easy to find and is there parking available?
- Is the room comfortable, light and well ventilated?
- Is the room uncluttered and without personal objects (photographs etc)?
- Does the client have to walk through any part of the house to access the counselling room?
- Are there stairs to negotiate? Disabled access?
- Is there access to good washroom facilities?
- Is there a waiting area?
- Is the room soundproof?

These are broadly the issues the Care First representative will be checking against when a visit is made to your premises.

If you work from more than one location, please ensure that Care First knows this in order to make optimum use of your availability and location/s. You may wish to discuss with your Case Manager the areas local to you where there are fewer Care First counsellors, with a view to securing the use of alternative premises; this could be mutually beneficial for you and for Care First.

Care First Stationery

The various forms and/or items of Care First stationery you will need to follow our processes through are shown in sample form in this booklet and also listed on the Stationery Order Form. To request a new supply, please complete the form and return to us at the following address:

**Care First
1230 Lansdowne Court
Gloucester Business Park
Gloucester
GL3 4AB**

On receipt of your order we endeavour to process your request within 3 working days and send you a new order form with your supplies. All stationery items can be sent by e-mail for your use as a template.

Associate Counsellors' Change of Details

If you wish to notify Care First of a change of address, work premises or other relevant issues, please use the Associate Details Form at the rear of this booklet. Such notification is important to ensure that Care First is able to respond efficiently to you. Please notify us if you change your e-mail address, as most Care First communication with Associate Counsellors will be by e-mail.

Associate Counsellor Holidays

If, at the point of a Care First client referral, you know you have planned holiday, we find it useful to consider whether that will have an adverse impact on the particular referral we are making to you. In many cases a holiday of a week or two weeks may add a useful time for assimilation and reflection in a counselling relationship; at other times the nature of a client's issue may lead us to consider seeking another associate counsellor, particularly if a client is vulnerable and recently suicidal.

It is helpful to Care First and our efficiency in dealing with client referrals if you would inform us by phone when you are going to be unavailable for referrals due to holiday, training or other arrangements. At the end of your period of unavailability, please make contact to reactivate your status on our database. This saves you the irritation of unnecessary messages left on your answer-machines and saves us unhelpful delays in confirming the placement of referrals.

Should you be unavailable to your clients during the period of a counselling process, please remind your clients of the availability of the Care First Telephone Counselling Centre should there be an urgent need. We will not engage in a counselling process or in any way interrupt the agenda to which you are working with the client, but we will offer support and containment in the immediate. The 24 hour free phone number for clients is 0800 174319.

Care First News and Updates

Please keep your eye on the Associate Counsellor page, www.care-first.co.uk for updated information.

In Conclusion...

It is important that all Associate Counsellors are aware of and work positively within the guidelines given in this Handbook. We trust that the explanations given will assist your understanding of Care First processes and systems and how we believe they work together to ensure that everyone's interests are served and that appropriate measures are in place to ensure the highest standards of professional work.

Care First welcomes ongoing dialogue with our Associate Counsellors. Please let us know if any of our guidelines are unclear or indeed if you have any suggestions for improving them. We **are** prescriptive in the way we ask you to work in order to ensure consistency **and** we value the unique contribution each Associate Counsellor brings to the Care First team and to the Care First clients with whom they work...provided the guidelines given in this Handbook are adhered to.

We look forward to an excellent working alliance with you!

**FIRST SESSION ASSESSMENT AND CASE NOTE
ASSOCIATE COUNSELLOR**

Date: _____ (Return to care first within 48 hours of this date)
Name of Assoc Counsellor: _____ **Referring Counsellor:** _____
Care First Case Manager: _____
Case Reference Number: _____ **Purchase Order No:** _____
Gender: _____ **Age:** _____
No. of Children: _____ **Occupation:** _____
Company: _____ **Location:** _____

Presenting Issues
 Be objective; do not include any professional or personal opinion you may hold.
 State clearly and exactly what the client says the issues are.
 Match the client's use of words as far as you are able.

Professional Services (complete where applicable)
 Is the client seeing any other professional? If yes give name, title.

State reason they are being seen and nature of intervention.

State frequency of contact and period seen over.

Medication (complete where applicable)
 Has the client been taking the medication? If so state the name of it and dosage.

How long has the client been taking the medication?

Does the client perceive therapeutic benefits from medication, i.e. does client have reduced symptoms?

Do not suggest or agree with any suggestion from the client to discontinue medication. If there is not therapeutic value or the side effects seem greater than the benefits, suggest they ask for a medicine review with either their GP or Psychiatrist.

First Session Assessment and Case Note Form

This is a two page document. The initial intake assessment form allows for detailed recordings of pertinent information to enable a thorough assessment to take place. This is to record the presenting issues and other relevant information discussed in the session

**FIRST SESSION ASSESSMENT AND CASE NOTE
ASSOCIATE COUNSELLOR**

Focus for Brief Therapy
 Which of the presenting issues will be the focus for brief therapy? What is a realistic and achievable focus?

Would the client benefit from being assisted into a local support system or professional service for long term work? Have you discussed this with the client?

Discussion with Care First Manager (where applicable) i.e. risk issues, specific issues.
 Please also be alert to issues which may pose a risk to the client organisation.

Clinical Intervention/Treatment Plan What is the treatment plan for the remaining sessions what are the client's goals?

Outcome plan

Date of next appointment

First Session Assessment and Case Note Form

This is the second page of the assessment. Both sheets must be sent into us.

EAP Case Note	
<i>Important: please complete the following details and return to CF within 48 hours of this session</i>	
Care First Case Reference No:	Purchase Order No:
Session Date:	Session Number:
Associate Counsellor:	Care First Case Manager:
Issues (Focus/goal)	
Options (Choices client faces about the way forward)	
Outcomes (What happened in the session. Agreed actions/tasks)	
Date of next appointment:	

Contents

Case Notes are a professional clinical record. They record the interaction between client and counsellor in each session and describe the issues and relevant details of the case. Case notes should be suitable for presentation in a court of law. The volume of client requests for case notes to be made available has increased sharply in the past 2-3 years.

Client 'DNA' Notification								
<i>(Required for case management and payment records)</i>								
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>Associate Name:</td></tr> <tr><td>Case Reference:</td></tr> <tr><td>Purchase Order number:</td></tr> <tr><td>Session number of</td></tr> <tr><td>Session date and time:</td></tr> <tr><td>Date Associate notified of cancellation:</td></tr> <tr><td>Reason for Cancellation:</td></tr> </table>	Associate Name:	Case Reference:	Purchase Order number:	Session number of	Session date and time:	Date Associate notified of cancellation:	Reason for Cancellation:	
Associate Name:								
Case Reference:								
Purchase Order number:								
Session number of								
Session date and time:								
Date Associate notified of cancellation:								
Reason for Cancellation:								
Tick as relevant								
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td>Client cancelled with less than 24 hours notice</td> <td style="text-align: right;">[]</td> </tr> <tr> <td>Counsellor to charge half fee</td> <td style="text-align: right;">[]</td> </tr> <tr> <td>Agreed with CF Case Manager that session is to be counted within allocated sessions</td> <td style="text-align: right;">[]</td> </tr> <tr> <td>Agreed with Case Manager that session could be replaced</td> <td style="text-align: right;">[]</td> </tr> </table>	Client cancelled with less than 24 hours notice	[]	Counsellor to charge half fee	[]	Agreed with CF Case Manager that session is to be counted within allocated sessions	[]	Agreed with Case Manager that session could be replaced	[]
Client cancelled with less than 24 hours notice	[]							
Counsellor to charge half fee	[]							
Agreed with CF Case Manager that session is to be counted within allocated sessions	[]							
Agreed with Case Manager that session could be replaced	[]							
OR:								
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td>Client cancelled providing more than 24 hours notice</td> <td style="text-align: right;">[]</td> </tr> <tr> <td>Counsellor to rearrange appointment with client</td> <td style="text-align: right;">[]</td> </tr> </table>	Client cancelled providing more than 24 hours notice	[]	Counsellor to rearrange appointment with client	[]				
Client cancelled providing more than 24 hours notice	[]							
Counsellor to rearrange appointment with client	[]							

DNA Notifications

These are a record of client cancellations and indicate whether the client gave you any notice of the cancellation or did not attend the session. These forms must be received if you want to invoice for 50% of the session fee.

CLOSURE FORM

Important: please complete the following details

Care First Case Reference No:	Purchase Order:								
Associate Counsellor:	Care First Case Manager:								
Number of sessions:									
Session Dates	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%;">1.</td> <td style="width: 25%;">2.</td> <td style="width: 25%;">3.</td> <td style="width: 25%;">4.</td> </tr> <tr> <td>5.</td> <td>6.</td> <td></td> <td></td> </tr> </table>	1.	2.	3.	4.	5.	6.		
1.	2.	3.	4.						
5.	6.								

Counselling terminated by: _____

Reason for termination: _____

Counsellor's final assessment: _____

Evaluation form/SAE given to client: Yes/No _____

Closure form

This form is requested in addition to a session case note for the final session. The closure form should give an overview of the counselling process and its outcome.

WHAT YOU CAN EXPECT FROM CARE FIRST SERVICES

Care First operates within a brief counselling model, which looks towards solutions, assisting you to utilise your own skills, strengths and resources for problem management. Care First offers an initial assessment session with a given number of agreed subsequent sessions. The appointment will last up to one hour, with the time, location and frequency of sessions negotiated between you and your counsellor.

Participation in counselling is voluntary, however once an agreement is made with a counsellor, we ask that every attempt be made to attend the sessions agreed upon. This regularity of sessions will assist in developing a helping relationship between you and your counsellor. If you are unable to attend, please inform your counsellor as soon as possible, preferably at least 24 hours before the appointment. Your counsellor will attempt to contact you to reschedule that appointment.

Confidentiality

Care First adheres to the BACP code of ethics on confidentiality. Confidentiality remains within Care First and can be broken for the following reasons only:

1. When the counsellor deems that the client is a danger to others or to the organisation. It is Care First's policy, however, not to act on a client's behalf or to intervene when there is a threat of suicide.
2. In the case of any incidences of terrorism.
3. If there is a disclosure of abuse/neglect of a child or vulnerable adult.

If it is felt that it is necessary to break confidentiality, your counsellor will make every attempt to encourage you to participate in the disclosure and will support you through this process.

Case Record

Case records are property of Care First, stored at Care First's Head Office, and the information within them is held in the strictest confidence allowed under the law. Specific information recorded within your case records will not be released without your written permission.

Client Information Sheets

Whilst we do not ask you to negotiate a written contract with Care First clients, the client information sheets should provide the basis for a brief discussion with the client regarding expectations and responsibilities at the first counselling session

EVALUATION OF CARE FIRST SERVICES

This questionnaire is a confidential form used by Care First to evaluate the service we provide to our clients. It would therefore be extremely useful to us if you would complete the form and return it to our central office. A stamped addressed envelope is enclosed for your convenience.

Company Name.....Department/Agency.....

Please circle the appropriate answer.

1) Did you contact Care First initially via the free phone telephone service?

YES

NO

2) If so was your call answered promptly?

YES

NO

Any other comment.....
.....

3) Did you feel your call was dealt with appropriately?

YES

NO

Any other comment.....
.....

4) Did you feel encouraged to speak to the telephone counsellor?

YES

NO

Any other comment.....
.....

5) Telephone Counsellor's name.....

For telephone and face to face contact

6) Are you satisfied that the service you received is confidential to Care First?

YES

NO

Any other comment.....
.....

7) Were you confident in the Counsellor's ability to help you?

YES

NO

Any other comment.....
.....

8) How soon after contacting Care First did you see a counsellor?

within 24 hours within 48 hours within 1 week within 10 days longer

9) Was this acceptable to you?

YES

NO

10) Was the room where you saw the counsellor comfortable, easily accessible and private?

YES

NO

11) Overall were you satisfied with the service you received?

YES

NO

Any other comment.....
.....

12) What effect do you think having counselling has had in the following areas of your work and personal life?

	very positive			very negative	
Your self-confidence	5	4	3	2	1
Your relationships with colleagues at work	5	4	3	2	1
Your relationships with your family/friends	5	4	3	2	1
Your job performance	5	4	3	2	1
Your decision making ability	5	4	3	2	1
Your overall enjoyment of life	5	4	3	2	1
Coming to terms with difficult/painful feelings	5	4	3	2	1

13) Face to Face Counsellor's Name.....

14) Do you have any other comment you would like to make?

.....
.....
.....
.....

THANK YOU FOR YOUR CO-OPERATION

FIRST SESSION ASSESSMENT AND CASE NOTE ASSOCIATE COUNSELLOR

Date: 17.10.03 (Return to CF within 48 hours of this date)
Name of Assoc Counsellor: Irene Speakeasy **Referring Counsellor:** Bernadette
Care First Case Manager: Joe Jones
Case Reference Number: BECIB 014569 **Purchase Order No:** BC000014
Gender: F **Age:** 43
No. of Children: 1 **Occupation:** Manager
Company: Wonder Web **Location:** Glasgow

Presenting Issues

Be objective; do not include any professional or personal opinion you may hold
State clearly and exactly what the client says the issues are.
Match the client's use of words as far as you are able.

Depression
Relationship Problems
'I feel like my life has fallen apart'
Child doing badly at school
Feels stressed and tired

Professional Services (complete where applicable)

Is the client seeing any other professional? If yes give name, title. YES
GP. DR Jones Steanbridge Surgery

State reason they are being seen and nature of intervention.

Depression - Medical

State frequency of contact and period seen over.

Monthly over 6 months

Medication (complete where applicable) Prozac 20mg Daily

Has the client been taking the medication? If so state the name of it and dosage.

How long has the client been taking the medication? **Has been taking for 5 months**

Does the client perceive therapeutic benefits from medication, i.e. does client have reduced symptoms?

Yes to some extent, slightly more on even keel

Do not suggest or agree with any suggestion from the client to discontinue medication. If there is not therapeutic value or the side effects seem greater than the benefits, suggest they ask for a medicine review with either their GP or Psychiatrist.

FIRST SESSION ASSESSMENT AND CASE NOTE ASSOCIATE COUNSELLOR

Focus for Brief Therapy

Which of the presenting issues will be the focus for brief therapy? What is a realistic and achievable focus?

- 1/ Depression/Stress
- 2/ Relationship Issues
- 3/ Identify possibility of longer-term needs/intervention

Would the client benefit from being assisted into a local support system or professional service for longer-term work? Have you discussed this with the client?

Not at this stage.
Will review this as sessions continue

Discussion with Care First Manager (where applicable) i.e. risk issues, specific issues.

Please also be alert to issues which may pose a risk to the client organisation

Clinical Intervention/Treatment Plan. What is the treatment plan for the remaining sessions?
What are the client's goals?

To work with client on above issues, explore and understand reactions and patterns of behaviour within the family.
Formulate action plans / strategies for future.

Outcome plan

As above, over 6 weekly sessions in total.

Date of next appointment

24.10.03

EAP CASE NOTE

Important: please complete the following details and return to CF within 48 hours of this session

Care First Case Reference No BECIB 014569**Purchase Order No:** BC000014

Session Date 24.10.03

Session Number 2

Associate Counsellor Irene Speakeasy

Care First Case Manager Joe Jones

Issues (Focus/goals)

Spoke to ex partner this week about his reasons for leaving and divorce.
Has been thinking a lot about this and her need for a special man in her life.
Hard to trust again. What will 'trust' mean in a new relationship?
Is on annual leave and spending a lot of time with daughter.
Realises she has been emotionally absent from her for past year.

SAMPLE

Options (Choices client faces about the way forward)

Explore conversation client had with ex partner.
Look at what has changed re: feelings / thoughts / understanding.
As a result – identify the above.
Explore the need for a “special” man in her life.
Explore issues of trust.
Talk to daughter in simple terms about event of past year.
Plan together for a better future for them both.

Outcomes (What happened in the session. Agreed actions/tasks)

Talking to ex was very useful. Has “laid to rest a few ghosts”.
Client identified that she feels happier with a partner, but does not want just anyone.
Would like to explore trust issues further.
Will continue to talk openly with daughter.
Feels a little more hopeful for the future.

Date of next appointment

31.10.03

CLIENT 'DNA' NOTIFICATION

(Required for case management and payment records)

Associate Name:	Irene Speakeasy
Case Reference:	BECIB 014569
Purchase Order number:	BC000014
Session number3..... of ...6.....
Session date and time:	31.10.02
Date Associate notified of cancellation:	31.10.03
Reason for Cancellation:	Sickness

SAMPLE

Tick as relevant:

Client cancelled with less than 24 hours notice	[<input checked="" type="checkbox"/>]
Counsellor to charge half fee	[<input checked="" type="checkbox"/>]
Agreed with CF Case Manager that session is to be counted within allocated sessions	[<input checked="" type="checkbox"/>]
Agreed with Case Manager that session could be replaced	[<input type="checkbox"/>]

OR:

Client cancelled providing more than 24 hours notice	[<input type="checkbox"/>]
Counsellor to rearrange appointment with client	[<input type="checkbox"/>]
Rearranged session date:.....	

CLOSURE FORM

Important: please complete the following details and return to CF within 48 hours of this session

Care First Case Reference No: BECIB 014569

Purchase Order: BC000014

Associate Counsellor: Irene Speakeasy

Care First Case Manager: Joe Jones

Number of sessions: 6

Session Dates:

1. 17.10.03	2. 24.10.03	3. 31.10.03 DNA	4. 06.11.03
5. 13.11.03	6. 20.11.03		

Counselling terminated by: Client and counsellor

Reason for termination:

Contracted counselling completed.
6 sessions in total.

Counsellor's final assessment:

Client engaged well in counselling.

Main issues explored were: divorce, trust, relationship with daughter and general unhappiness / stress / depression.

Client says counselling has been very helpful and she understands herself and past difficulties better.

She feels she has formulated action plans, which have benefited both her and her daughter.

She says she feels much more positive and relaxed and has hopes for the future.

Evaluation form/SAE given to client: Yes/No

Clear details of the payee and address to which cheques should be sent.

A.N Other
Counsellor
Address 1
Address 2
Address 3

Create your own invoice number, this will be listed on the cheque remittance we send you, and identify which invoice(s) are being paid

INVOICE

Care First
1230 Lansdowne Court
Gloucester Business Park
Gloucester
GL3 4AB

Invoice No:.....

Important to identify if we have received the case notes

Invoice Date:.....

Case Reference:.....
(Please only one case ref per invoice, multiple sessions permissible)

Purchase Order Number:.....

Along with the case reference the purchase order will identify the case we are settling.

Session Date	Session Number	Value
5 th January	3	£30
16 th January	4	£30
23 rd January	5 DNA	£15
	<i>Subtotal</i>	£75
	<i>VAT 17.5%</i>	n/a
	<i>Total</i>	£75

Clear dates and session numbers brings everything together and speeds payment of invoice

Care First

Stationery Order Form

Document	Quantity Required	
	Full Set Quantity	Alternative Quantity for High Volume Users. Tick as required.
Full Stationery Set (Contains all of the below forms)		
What You Can Expect from Care First	/4	
First Session Assessment Form	/4	
Case Note	/20	
Closure Form	/4	
Client DNA Notification	/4	
Evaluation Form & Freepost Envelope (Posted only)	/4	

<p>Name:.....</p> <p>Address:.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>Please tick box if you would like to receive the stationery by email (all MS Word Format).</p> <p>Email Address.....</p>
