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4.1 Introduction

On commencement of transactional analysis training all students and trainers are recommended to discuss the learning and accessibility needs of the student. An Expression of Accessibility Requirements Form (13.4.7) has been created to allow the student to outline their specific needs and requests. It is recommended that this form is regularly reviewed and sent in with any CTA, CTA TS, TSTA contract, registration for TEW form and exam application forms, as appropriate.

At a certain point in the training, students of transactional analysis may sign a formal contract with EATA and a principal supervisor. The contract is the commitment of both the trainee to complete his or her journey to certification and of the principal supervisor to support the trainee and share responsibility for his/her/their appropriate development.

Local and national TA associations provide details of accredited TA trainers and institutes. Contracts may be signed with the organisation to which trainee and trainer belong, or they may be signed following the relevant agreements with other affiliated associations.

A person may sign more than one contract – i.e. in different fields with different principal supervisors.

4.2 Registration of EATA Contracts and Payment of Fees

Registration of contracts is usually done directly with EATA by email. Some national associations have made direct agreements with EATA where the association sends directly the contracts to EATA for registration. In this case, trainers and trainees should follow the procedures laid down by the national association. These may differ slightly in some respect from those outlined in the training contract. Trainees should consult their national association to check if it has such agreement. See Appendix 1 for payment information.

A A CTA training contract lasts for five years and can be renewed if the trainee wants to continue training after five years; the contractual relationship can be continued by signing a new contract form, following the same procedure as with the first contract.



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The contract fees have to be paid again. The second contract lasts for the same amount of time as the first. Formally, this second contract is a new contract, and the trainee can either change his /her/their principal supervisor or can renegotiate the contractual details with his/her/their actual principal supervisor.

There is no limit on the number of times a CTA contract can be renewed.

A CTA contract must be registered at least one year before the date of the exam. It is however recommended to have a contract signed and endorsed 18 months before submitting the written exam (see section 3, 7 and 8). This rule does not apply for the trainees signing their second CTA contract following to the expiring of their first one.

The principal supervisors need to use the following checklist with their trainee each time, before a contract is sent to EATA for endorsement by email.

1. In order for the contract to take effect, both the trainee and the principal supervisor must have paid the annual membership dues to EATA for the current year.
2. Each contract must be dated and signed by both the trainee and the principal supervisor(s).
3. All relevant parts of the form must be completed.
4. The forms need to be completed in English.
5. Details of supervision and other requirements including national requirements, for example a psychiatric placement (as required in some countries for psychotherapy), needs to be included.
6. The fee for filing the contract must be paid,
7. Both trainees and trainers should check if their national association has its own system for paying the contract-filing fee. If there is a national system, the



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instructions given by the national association are to be followed.

8. If there is no national system, the current amount, related to the contract-filing fee, need to be paid by bank transfer to EATA according to bank account details shown in the contract
9. The trainee must pay required bank charges.
10. The name of the trainee and the date must appear on the bank transfer document.
11. When the money is transferred, a copy of the bank transfer document needs to be attached to the contract sent to EATA.
12. Please *do not* send
 - a) Contracts by registered mail
 - b) Incomplete contracts
 - c) Cheques, money, or bank drafts with the contracts to EATA.

If items 12b) and/or 12c) are sent, they will be returned.

13. Please contact EATA if you have received no response within one month of sending the contract and documents in case they have gone astray or been lost in the post.

On the CTA contract form, the trainee needs to indicate in figures the cost of continuing training at the current year's rates, specifying currency used.

4.3 Selecting a Field of Specialization

When a trainee and principal supervisor sign a contract form, they need to select and specify the field of specialization. The four fields are Counselling, Education, Organization and Psychotherapy.

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The field of specialization is normally selected so that the majority of the trainee's professional practice is contained within it. If the trainee's practice touches upon other fields of specialization, then the trainee and principal supervisor will normally agree so that the trainee obtain some supervision from other trainers qualified in those fields.

There may be national legal restrictions on who can practice as a psychotherapist or a counsellor, and **it is the responsibility of both trainee and principal supervisor to be fully informed and aware of this when choosing their field of specialization** (see sec.2 page 2 and sec. 3 page 2).

The principal supervisor has the responsibility for informing candidates at the beginning of training about his or her field or fields of specialization, and about the procedures for filing contracts. Normally principal supervisors only sign contracts in their own field(s) of specialization. If a principal supervisor wishes to sign a contract for a field of specialization in which they are not qualified, they need to apply to PTSC for a contract Exception (Section 4.9), or Expansion (Section 4.10).

4.4 Duration of Contracts

A CTA training contract lasts for five years and can be renewed if the trainee wants to continue training after five years (see above 4.2). There is no limit on the number of times a CTA contract can be renewed.

A CTA TS training contract duration is seven years, CTA TS contracts may be renewed only once for additional seven years (total 14 years altogether).

A TSTA training contract duration is seven years, TSTA contracts may be renewed only once for additional seven years (total 14 years altogether).

Before the first CTA TS or TSTA contract is about to expire, the candidate needs to submit his/her/their second CTA TS or TSTA contract for endorsement to EATA, to continue their training.



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A copy of the first contract must be included with the second contract application.

The second contract will only be endorsed if both items are received prior to the expiry date of the first contract.

The second contract will then begin on the expiry date of the first; no gaps are allowed between the first and the second contract: this rule is aimed at providing protection for trainers, trainees and supervisees within their contract. The date to be considered is the endorsement date of the contract as validated by EATA.

A PCTA TS or a PTSTA may choose to change their contract from CTA TS to TSTA or vice versa. To do this they will need to take out a new contract for the desired qualification. If the change is made mid-contract the new contract will have the same expiry date as the previous contract.

If, after a minimum of 2 years working as a CTA TS, a CTA TS wishes to take the TSTA exam they may sign one TSTA contract for a period of no more than 5 years. There is no requirement to attend another Training Endorsement Workshop.

If the CTA TS or TSTA contract expires the PCTA TS or PTSTA reverts to CTA status. Any contracts held by them will automatically fall to the CTA TS/TSTA contract holder who will be responsible for them.

In total CTA TS and TSTA contracts are limited to a maximum of 14 years.

If a PCTA TS or PTSTA does not complete a certification process (CTA TS or TSTA) within 14 years of endorsement date of the first contract, they are no longer able to use the PCTA TS / PTSTA status.

PCTA TS as well as PTSTA candidates are also not allowed to attend a new TEW in order to start another CTA TS or TSTA contract.

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

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4.5 Contract Leave of absence

It is possible to apply for one year of leave of absence only once, in the course of either the first or second seven-year PCTATS/PTSTA contract. This must be done with the agreement of PTSC. The PCTATS/PTSTA, in agreement with his/her/their principal supervisor must write to PTSC to communicate the exact dates of the one year leave of absence and reason(s) for it. During that period no new contract can be signed by the PCTATS/PTSTA.

PTSC will issue a document indicating the agreement of leave of absence for the specific period indicated, clearly defining the dates of it. A partial leave of absence is generally not accepted (as an example three times 4 months leave of absence) **However exceptions may be considered.**

4.6 Cancelling a Contract

A trainee or a principal supervisor may want to cancel a contract during its duration in such case he/she/they must first come to an agreement with the other contracting party (see 3.3 F) and then send the contract back to EATA, who will inform the national organization. Before sending the contract back to EATA, both the principal supervisor and the trainee, need to write "Cancelled on (date)" and sign it. Some associations receive the cancellation forms directly from members and the forms are forwarded via the national association to EATA.

A contract is automatically cancelled if either the trainee or the trainer does not renew his/her/their membership to EATA (see sec 3).

4.7 Changing a Principal Supervisor

If, for whatever reason, the trainee wishes to change their principal supervisor during the term of a contract, this can be done as follows:

1. The trainee normally agrees the change with his or her existing principal supervisor



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and with the future principal supervisor.

2. All three parties complete and sign the Change of Principal Supervisor form. Four copies of this form must then be sent to EATA's Executive Secretary or to the national association, (see above 4.2), along with one copy of the original contract, and, if necessary, with any exception document.
3. EATA registers the change of principal supervisor, and one date-stamped copy of the completed form is then returned to each party.
4. If there is a change of principal supervisor during the CTA training, the 40 hours of supervision required are to be counted by including all hours done with each of the principal supervisors.

Both the trainee and principal supervisor are free to change the principal supervisor arrangements if they wish. The whole process should be conducted from an OK+ OK+ position without prejudice to any party.

If there is a change of principal supervisor during either the first or second PTSTA or the PCTA TS contract all the training hours acquired prior to the change are counted

4.8 Changing/Adding Field of Specialization

- A CTA contract can be changed by cancelling the previous one and simply signing a new one in the new field in the usual way.
- Adding or changing a field at CTA level: there is currently no alternative to taking all of the CTA exam in the new field and completing all the EATA requirements for the new field. The previous training followed in another field by the candidate can be considered and counted under the responsibility of the principal supervisor in the new field.
- A TSTA, CTA TS, PTSTA, or PCTA TS may change/add fields either by taking the



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CTA examination in the new field and signing a new TSTA or CTA TS contract or by following the expansion route (see 4.10 below).

- A CTA qualified in two fields who wishes to have a CTA TS or a TSTA contract in both fields need only attend one TEW workshop.
- There is no time limit after the TEW to sign a TSTA contract in the second field.
- After a change of field by a PTSTA or PCTA TS a principal supervisor may continue to hold existing contracts in the old field by automatic Exception. No new contracts may be signed without going through the Exception process

4.9 Exceptions for Principal Supervisors of CTA, CTA TS TSTA Training Contracts

4.9.1 Introduction

A TSTA, CTA TS, PTSTA, or PCTA TS and a trainee may for some reason want to sign a training contract together in a field of specialization in which the principal supervisor does not have qualified status. If this is the case the principal supervisor may apply for an exception.

4.9.2 Definition

1. An exception is a specific permission given to a TSTA, CTA TS, PTSTA or PCTA TS, to sign a training contract in a field of specialization in which they are not qualified.
2. An exception is given to a principal supervisor for a single contract.
3. It does not confer the right to sign contracts within a field of specialization as a whole.
4. An exception may be granted if the trainee and the principal supervisor can provide

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good reason for this, and the requirements are met.

4.9.3 Applying for an Exception

The principal supervisor applying for an exception and the trainee must both be members of EATA. (See checklist form 13.4.5).

1. The principal supervisor and trainee need to apply for the exception at the same time.
 - The trainee must give good reason why he/she/they want to sign a contract with the chosen principal supervisor. This will normally be the unavailability of an appropriate local trainer in the chosen field.
 - An additional endorsement must normally be obtained from a TSTA, CTA TS, PTSTA, or PCTA TS who is qualified in the candidate's field of specialization
2. The Principal Supervisor applies for the exception offering evidence of his or her professional competence, qualification to work in and practical experience of the field of specialization in which the candidate wants to qualify. This “Trainer’s verification of competence” is not needed if the supervisor gives evidence that he/she/they have already obtained an exception in the relevant field. The principal supervisor must also specify how many exceptions are still active in the field.
3. The principal supervisor submits a training plan. In this training plan, the principal supervisor needs to:
 - Give the name of the proposed co-principal supervisor or give information about how he/she/they will cover the training needs in the chosen field (see point 5 below).
 - Say whether this is a TSTA, CTA TS or CTA training contract.



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- Describe who will be responsible for which sections of the training plan.
 - Show that EATA's training standards will be fulfilled.
4. The co-principal supervisor must:
- Be qualified to teach and supervise in the field of specialization of the trainee, so he/she/they will be accredited in the relevant field.
 - Agree in writing to co-operate with the principal supervisor in the training process.
 - Be a PCTA TS, PTSTA, CTA TS or a TSTA for a CTA contract.
 - Be a TSTA for a TSTA or CTA TS contract
5. Candidates must have 30% of their overall training under the responsibility of the co-principal supervisor.

For CTA candidates this means that a minimum of 15 hours of supervision and 90 hours of training, which may be under different forms, must be completed with the co- principal supervisor

For PCTA TS or PTSTAs candidates with exception, the minimum supervision hours to be completed with the TSTA co-principal supervisor, from the same field of candidate, must be 30% of the overall minimum required in teaching and in supervision.

6. In cases where no qualified person is available as co-principal supervisor, PTSC may grant the exception, without the principal supervisor having to fulfil the requirements of co-operation with a co-principal supervisor. In this case, the principal supervisor must describe how he/she/they will obtain supervision and guidance from PCTA TS or PTSTA or TSTAs in the chosen fields.

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7. Requests for exceptions together with documentation (including the Exceptions Documentation Checklist – (see 13.4.5) must be sent to the relevant PTSC member. A delegated member of the committee handles contract exceptions on behalf of PTSC (see EATA website EATA organizational structure –Committees-PTSC).

4.9.4 Granting or refusing an Exception

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

4.9.5 When the Exception is granted

1. If the request for an exception is granted, the principal supervisor will receive a letter to this effect from the responsible PTSC member.
2. The principal supervisor and trainee should go through the normal contract filing procedure enclosing a copy of the letter of approval.

4.9.6 When the Exception is refused

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

4.9.7 Subsequent Exceptions

Trainers applying for further exceptions in the same field do not need to send verification of

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competence. There is normally a limit of three exceptions to be held simultaneously by a principal supervisor **for all training contracts** in a given field.

4.10 Expansions for Principal Supervisors of CTA, CTA TS, TSTA Training Contracts

4.10.1 Introduction

A TSTA, CTA TS, PTSTA or PCTA TS may wish to expand his/her/their permission to train and to sign training contracts because of professional background and experience in a field of specialization other than the one in which he/she/they are qualified.

The expansion procedure has been developed so that experienced principal supervisors do not have to go through the whole CTA and TEW procedures, although that remains an option. (See form 13.4.6 for required information).

A PTSTA/PCTA TS may apply for an expansion two years after his/her/their endorsement as a PTSTA/PCTA TS.

4.10.2 Definition

1. An expansion is a general permission, given to a TSTA, CTA TS, PTSTA or PCTA TS to teach, supervise, credit hours and sign training contracts in a category, which differs from his/her/their original field of specialization. A TSTA, CTA TS, PTSTA or PCTA TS, after an expansion, has the right to define themselves as TSTA, CTA TS, PTSTA or PCTA TS in the new field.
2. An expansion granted to a TSTA gives permission for them to sign CTA and TSTA training contracts in a field that differs from the TSTA's original field of specialization.
3. An expansion granted to a PCTA TS or PTSTA gives permission for them to sign CTA training contracts in a field that differs from the PCTA TS or PTSTA's original field of specialization.



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4. If a PCTA TS/PTSTA applies for an expansion, the PTSTA's principal supervisor must:
 - a. be certified in the field of specialization for which the PCTA TS/PTSTA is applying
 - b. ask for an exception and/or co-operate with a named TSTA who is qualified in the field of specialization for which the PTSTA is applying and who is jointly responsible for the PTSTA's training in the expanded category.

4.10.3 Applying for an Expansion

The person applying for an expansion must be a member of EATA and is required to demonstrate professional competence as a practicing transactional analyst, supervisor and trainer in the field of specialization for which the expansion is required.

The applicant should submit:

1. An application for an expansion, giving reasons for the request.
2. A written statement, similar to sections A and B of the CTA written examination but referring to the field of specialization for which the expansion is required.

This statement has to be anonymous. It must consist of two parts:

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

- a description, with examples, of the way the applicant works within the field of specialization for which the expansion is requested.
- a description of the applicant's training philosophy.



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- a discussion of how his or her work in this field is similar to and different from his or her area of specialization.

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

3. A letter of support from a TSTA who is certified in the field of specialization for which the expansion is required. If such a TSTA is not available, a letter of support from a relevant PTSTA/PCTA TS may be accepted.
4. A photocopy of their certification as a TSTA or CTA TS or of their PTSTA or PCTA TS Contract.
5. Either a photocopy of two CTA certificates in the expanded field gained by trainees whose contracts he/she/they have held by exception or a copy of the applicant's oral exam certification in the new field (in other words the applicant may choose to submit to the oral part of the CTA examination as evidence of his/her/their competence: in this case he/she/they need a special permission from PTSC to go to the exam).
6. A photocopy of payment of the registration fee.
7. The Expansions Documentation Checklist (see 13.4.6).
8. Requests for expansions together with documentation should be sent to the relevant PTSC member. A delegated member of the committee handles contract expansions on behalf of PTSC.

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4.10.4 Granting or refusing the Expansion

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

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



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4.10.5 When the Expansion is granted

If the requirements set out in paragraph 4.10.3 are met and the written statement is accepted, PTSC will grant the expansion.

The successful applicant will receive the anonymous evaluation of the written statement.

The successful applicant can take the title of TSTA, CTA TS, PTSTA or PCTA TS in the new field. If a PTSTA passes the TSTA exam the expansion will be automatically recognized also at TSTA level.

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

4.10.6 When the Expansion is refused

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

4.10.7 Variations in procedure

The PTSC chair and committee deal with variations to the basic procedure. The name and address of the person who is currently handling Exceptions and Expansions is given on the EATA website www.eatanews.org EATA organizational structure – Committees-PTSC).



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4.11 Documentation

Certified Transactional Analyst Training Contract (13.4.1)

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