



What are the issues that you face in your client work with employee assistance providers (EAPs) and organisations? Q&A is your chance to ask members of BACP Workplace to respond to your workplace queries

I've just started a new role as a therapist for an occupational health provider. Recently, a staff member was referred for counselling by their manager, having had recurring periods of sickness absence after the end of a long-standing relationship with her partner. The referral said that the client had heightened anxiety and problems sleeping, which have affected the client's concentration at work.

The client's manager added a note to the referral to say that he was concerned about the staff member, who was clearly anxious and troubled that her ex-partner sometimes turned up at work unexpectedly. The manager requested a report as part of the agreement for six sessions of counselling.

How do I write a report that protects client confidentiality and my duty of care to the client while also being accountable to the client's employer, who funds the counselling? I've never written a report about a client before and I'm concerned that my loyalty is divided and I may inadvertently breach the client's confidentiality.



Claire McCluskey is an accredited relationship therapist who works integratively. She has a private practice and also works as a workplace therapist with EAPs, the NHS and PAM Wellbeing. walescounselling.co.uk



Nicola Neath is an accredited integrative psychotherapist and trainer, working in the Staff Counselling and Psychological Support Service at the University of Leeds. She is the co-author of *To Be Met as a Person at Work: the effect of early attachment experiences on work relationships*.

The referral you have received is a common one for workplace practitioners, as is the request for a report to be written to accompany the end of the counselling sessions. However, your question highlights the competing needs which the workplace counsellor must negotiate and the ways in which the workplace context is so distinct from private practice – the employer always has a duty of care, but particularly so when an employee may be at risk.

Ideally, you will have received an induction on joining the OH team, and this should include specific training on the report-writing process which is part of your role as a counsellor. Referral and reporting processes should also always be made clear to the employees using the service, who need to be aware of how information will be shared. It is important that you understand this, as it will help you as you contract with your new client and explain to the client how data will be managed.

Understanding information-sharing

However, if you are unsure, we recommend that you initially seek information from your case manager regarding procedures and policy about GDPR, report-writing, sharing information and data protection, before meeting the client for the first time. It's important to find out what the agreement is for sharing any referring information with any managers involved in this referral. This will be

crucial to respecting the rights of the client, maintaining your professional integrity and transparency, and managing expectations on all sides. Make sure that you are clear about the distinction between your own notes of the counselling sessions – which the client's manager will not have access to – and a specific, brief report which you are requested to write.

Clear contracting

Once you understand the processes for sharing information, you can include this in your contract when you meet the client for the first time. You can be open with the client about the fact that a report has been requested by their manager at the end of your sessions, and explain how you will go about this. Let the client know that the report will be factual and that it will be written with their full knowledge and an opportunity to agree the content of the report.

What to include in the report?

It's good practice to keep the content of a report to the facts and be aware that any identifiable information should be minimised or excluded as far as possible. However, information that is useful to the client's manager to help him carry out his duty of care could be included. It's well worth explaining to the client how the report will be shared with their manager; for example, by using a secure portal, only accessible by the manager. Being clear about boundaries is an important workplace competence and one that you can read about in the Workplace Competence Framework in section 1.5, 'Ability to establish and maintain professional boundaries', and in section 9 on 'Meta-competences'.

Your report could include the reason the referral was made as well as any agreed pertinent work or domestic presenting issues (which the manager who referred the client will already be aware of). It might be relevant to disclose a diagnosis if there is one, information about prescribed medication or the client's psychological measures scores. It could also include the counsellor's opinion; for example, that the client's stress or distress is predominantly work/home related and that counselling is recommended, ongoing or ending.

Holding in mind your responsibility to the employer, the report could

also include advice to the manager; for example, a suggestion of any additional support which could help the client. This could be further counselling sessions or recommendations which help provide a supportive environment, recommending that a stress risk assessment is conducted, making reasonable adjustments or offering an opinion on fitness to work/the impact of therapy on the client's fitness to work.

Assessing risk

Importantly, your question sets off alarm bells on reading that the client has an ex-partner who has previously turned up at work unexpectedly, and this kind of behaviour is something workplace counsellors do experience. It's possible that there is an issue of coercive control, and if so, this will become an important part of your work with the client, and you will benefit from taking this client to supervision. You will need to address the client's safety at work and out of work, and share information with the client's line manager (with the client's consent), as the employer has a duty of care to their employee.

This is information which can also be appropriately included in the report, along with a recommendation that the security team who oversee the client's place of work are advised of the potential risk to the employee and do not allow the ex-partner access on site. In such cases, it's good to offer the client access to a convenient parking space and, if required, to have support from security to accompany her to her car at the end of the day as well as the offer to work flexible hours.

Assessing risk and potential harm from others is one of the core competences in the Workplace Competence Framework in section 6, 'Risk assessment and response'. You may need to develop a risk-management plan, which could be shared with others, with the client's permission, to help manage the risk that her ex-partner may pose. A good therapeutic relationship will help the client to be able to speak about her past with her ex-partner and for you to understand whether she is at risk of abuse now, as well as finding out if there are children involved/safeguarding issues.

Signposting

In the workplace setting, it helps to know other agencies that could support your client in emotional and practical ways, both in the short, mid and longer term, such as Victim Support and the Women's Aid Freedom Programme, and to make the client aware that her police force will have a specialist police officer trained in domestic abuse.

To summarise, if you can write a report that includes the client's otherwise unmet need (fear and anxiety) and recommends suitable adjustments to prioritise her safety, such as adjustments to working hours/flexibility, this can help to reduce the client's anxiety at work. The report then becomes a useful tool to help communication between employer and employee to alleviate workplace/personal stressors. Information-sharing helps to identify the client's psychological and physical need for safety and safeguarding, so that the client can get both emotional support (counselling) and practical support (workplace adjustments).

And finally, it's important to remember that as a workplace counsellor, you are not operating alone – when you are engaged in the workplace context, you have the capacity to draw on the benefits of organisational support for the good of the employee's wellbeing, and it can be truly valuable. That's why being able to draw on the value of communication and cooperation between employers, employees and support agencies to support health and wellbeing in the workplace, is a core workplace competence for practitioners.

For further information:

The Workplace Counselling Competence Framework recognises and supports the roles of workplace counsellors and enhances professional standards. You can access the framework at: <https://www.bacp.co.uk/events-and-resources/ethics-and-standards/competences-and-curricula/workplace/>

Do you have a query or issue about your work that you'd like some help with? Please email the editor: workplaceeditor@bacp.co.uk

