

## **CASE STUDY GUIDANCE MANUAL FOR PRACTITIONER CANDIDATES**

**This manual has been written as a form of reference so that you can comply with your obligations in submitting case studies according to the Vitality Living College International regulations.**

**In this Guidance Manual you will find information and forms on:**

- 1. Preparing a Case Study.**
- 2. Information on the Case Study requirements for Practitioner and Advanced Practitioner level.**
- 3. A recording form for Case Studies**
- 4. A Sample Case Study at Practitioner Level**
- 5. Case Study guidance request form**

### **Preparing a Case Study**

#### **1. Background Information**

The first section of your Case Study will present your client's basic background. You can include factors such as age, gender, work, health status, mental health history, drug and alcohol history, life difficulties, goals and coping skills etc

#### **2. Description of the Presenting Problem**

In the next section of your case study, you will describe the problem or symptoms that the client presents with. Describe any physical, emotional or sensory symptoms reported by the client. Thoughts, feelings, and perceptions related to the symptoms should also be noted.

Any screening tools (PHQ9, GAD, HAD, SUD etc) or diagnostic assessments that are used should also be described in detail and all scores reported.

Use of Intake questionnaire and clarity of the problem the client wants to resolve.

#### **3. Assessment**

Provide your overall impression and give the appropriate assessment. Explain how you reached your assessment, how the clients symptoms were presented etc.

#### **4. Intervention**

Here you will explain what methods you used to bring down the SUD or understand the problem at a deeper level. For example:

- Full EFT routine (Full Basic Recipe)
- Movie Technique
- Tell the Story

- Fears & Phobias
- Limiting Beliefs
- Key Word
- Use of Questions
- Flexible Language
- Inner Child
- Archetypes/Shadow/Parts
- Role of love and forgiveness
- Describe some (not all) Set up phrases that were used.. “Even though.....etc”

## **5. Outcome**

The outcome of the session need not necessarily be a successful one – especially as you will only be conducting a few sessions. The important factor is how you demonstrate the techniques and skills you’ve been taught and your judgement in selecting which ones to use at which times during a session.

An example of a successful outcome may be measured by achieving the client’s goal (say being able to fly on a plane) or reducing their levels of anxiety and maintaining that level when they return for their next session. An unsuccessful outcome may well be your greatest teaching moment; please describe what was learned from the session and what will be done differently in similar circumstances.’ (See Section 6 for more on this.)

## **6. Post session review**

At the end of each session jot down brief notes which will enable you to write detailed notes later for your records and give yourself time for self-reflection.

- How did I do?
- What could I have done better?
- What could I have used more of?
- Where did it work well?
- What was getting in the way and what was the reason for this?
- What I learned as a Practitioner, about the process and about the client?

## **Guidance on marking Case Studies**

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

In writing a Case Study you will be demonstrating some (and not necessarily all) of the following:

- \_identify the particular feeling, memory, belief or situation that is a problem for the client

- \_agree on the goals/desired outcome;
- \_introduce any safety techniques;
- \_decide on the EFT techniques to be used
- \_indicate what phrases you used to bring about a change in the SUD level.
- \_ability to establish boundaries
- \_knowledge and understanding of principles, theories and techniques of EFT
- \_how you explained EFT to the client and how you initially demonstrated it to them.
- \_how you isolated issues to be worked.
- \_If PR was present and if so how it was neutralised. What set-up affirmations were used and how you decided what words to use.
- \_the reminder phrases that were used.
- \_which points were tapped - a full sequence or shortcuts.
- \_the methods used to address the issues and why these were chosen.
- \_how far the issue was resolved, and how this was assessed.
- \_if partial resolution of an issue occurred, what you did next.
- \_what testing methods you used
- \_whether there were any shifts of aspect or issue.
- \_whether there were any cognitive shifts.
- \_which questions were asked to reach deeper levels of issues.
- \_how affirmations were framed and reframed.

The Trainer will need to be assured that you know when and how to ask appropriate questions to reduce the SUD scale and bring about a cognitive shift. How well you understood the client's presenting issues and how to handle any abreactions or overwhelms. They will be establishing whether you are able to build rapport with the client, how you handled an abreaction, shifting aspects etc.

If needed make notes during the session as a reminder or ask permission to record the session and write more notes immediately after the session.

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

**Please note that we are asking for 3 case studies with 4 sessions for Practitioner level, which can include 1 case study working on the self (4 sessions). At Advanced Practitioner level we are asking for 3 case studies (3 sessions each) and 1 practice review. EFT Level 3 case studies must be of a higher standard and from complex sessions. These are the minimum requirements but emphasis is on "quality" and not "quantity". Trainers will be seeking to establish your knowledge and application of advanced EFT techniques.**

**Skills that your Trainer will be looking for at Practitioner or Advanced Practitioner candidate level.**

Example:

- Questioning skills
  - What does that feeling remind you of?

- Where do you feel that right now?
  - What SUDs level is it?
- How is the Practitioner getting the information?
  - Is the client's body language being noticed?
  - Are appropriate listening skills being used?
- Is the Practitioner keeping the client safe by
  - Not contaminating the client's words
  - Utilising any safety techniques
  - Being respectful of the client in all ways
  - Being non-judgemental.
  - Being aware of anything they were triggered by during the session
  - Explaining what the client feels now is a trigger and not what is happening now.
- Does the Practitioner notice any projections or counter transferences taking place?
- Is the Practitioner using a variety of measurement tools (SUD, VOC etc)?
- Is the Practitioner fully aware of 'aspects'?
- Is the Practitioner moving with each aspect as it comes up but remembering to go back to the original aspect to check it's been cleared?
- Is the Practitioner being specific enough?
- Is the Practitioner going with the client and their beliefs or are they putting on their own interpretations?
- Is the Practitioner testing sufficiently to establish if the emotion has been neutralised?
- Is the Practitioner being 'present' at all times in the session giving their client full connection and focus?
- Is the Practitioner being aware of the 'clock' time & 10 minutes from the end mentioning there is 10 minutes left in order to prepare the client's subconscious and avoid any new issues arising?
- Were issues isolated?
- How was the issue resolved?
- If there was partial resolution, what did the Practitioner do next?

Were there any cognitive shifts?

What techniques were used (use the skills appropriate to the client session – which can vary session by session). For example EFT level 2 skills are:

Tell the story  
Continuous tapping  
Movie technique  
Tearless trauma  
Aspects uncovered  
Limiting beliefs  
Rambling language  
Sneaking up on a problem  
Key word approach  
Specific questions or techniques used to get to the core issue  
Argument tapping  
Surrogate tapping  
Reframes  
Rapport building  
Preparing intake/consultation form  
Explanation about EFT and its effects  
Observation of client state  
Use of measurement tools

### **Recommended session times**

All session times should be limited to no more than 1hr 15mins. First sessions usually include a consultation so add another 20-30mins approximately for this.

### **Information on the Case Study requirements for Practitioner level.**

Students are required to submit a minimum of 3 Case Histories (including one on the self) with an average of 4 x 1 hour session per Case History (**min 12hrs total**). So 2 clients with 4 sessions each and a set of 4 sessions on self. You also have the option to replace the sessions on self with a client. In the event your clients improve sooner you will still need to submit additional sessions on other clients, submitting 12 sessions in total.

### **Notes**

- The Case Studies must be of a standard that demonstrates knowledge, skills and competence at the relevant Practitioner level.
- If you have any questions around Case Studies, please contact your Trainer
- All Case Studies are to be submitted to your Trainer within 12 months (EFT Level 2) of attending the relevant training course or the date on the attendance certificate. If there are any problems in this area, first speak with your Trainer.
- Your Trainer has the discretion to ask for these sessions to be submitted in one or more formats (ie written, recorded, filmed).

Written case studies should follow the format included in this Guidance.

- The studies should demonstrate an in-depth exploration of issues and competent use of EFT techniques. One session can be on your own issues.
- Multiple issues and physical and emotional issues may occur in the same session. It is not necessary for a session to be successful: You can sometimes learn a great deal from analysing what didn't go so well. It is perfectly satisfactory to present a session in which you did not achieve complete resolution of the issues.

### **Informed Consent**

Please obtain consent from the other person to use any written or recorded material from the session in your Case Study before you begin.

Inform them that you are learning EFT and that you will need to submit your notes for assessment to establish your competence. Reassure them of complete confidentiality at all times and that their real identity or any circumstances which might identify them will not be included.

### **RECORD OF EFT CASE STUDY SESSIONS FOR \*PRACTITIONER LEVEL** **(\*delete which not applicable)**

**Name of EFT student**

**Date of session**

**Client ID**

**Gender**

**Case Study No:**

**Session No:**

- Each session should include how you got to the core issue, what techniques were used and how the SUD rating changed.
- What set up phrases were used etc
- If you have any testimonials, please include them.

**Background Information**

**Description of the Presenting Problem**

**Assessment**

**Explanation**

**Desired Goal or Change wanted**

**Intervention**

## **Outcome**

### **Future planning**

### **Post Session Review**

## **SAMPLE CASE STUDY AT PRACTITIONER LEVEL**

**Name of EFT student** Ann Smith **Date of session** 16/5/2013

**Client ID and gender** GR(Female) **Total No of sessions to date** 5/10

### **Background information:**

Refer to intake form attached.

### **Description of presenting problem:**

GR sent an email asking for an appointment. In her email she said: "I am suffering from the loss of my mum, she died very suddenly in January at only 64 years of age. She was everything to me as I've been a single parent for 10 years. I can't get over it. She helped me through my divorce and has continually helped me with the bringing up of my children, who are now 14 and 11. She played a major role in my life. I now find myself very alone. I also worry about my dad and how he is coping. He comes to see me often and most of the time he keeps on talking about how lonely he is. "

### **Assessment:**

When GR came for her first appointment she was very calm. We talked for a while about her relationship with her mother and her father. I noted that GR had additional issues apart from the ones mentioned in her e-mail. These included:

- Resentment that GR's father was so selfish about his loneliness and doesn't appear concerned with how much GR misses her mother.
- Feelings of guilt that GR couldn't help her father.
- A weight problem.
- GR feels lonely even when she is with friends.
- Low self-esteem.

### **Desired Goal or Change Wanted**

GR wanted to:-

- \_Lower stress/distress
- \_Improve her low self esteem
- \_Enhance and modify her current coping strategies

### **Explanation:**

I explained to her I was an EFT student and that I would need her permission to use her case study for my trainer but her personal details would remain confidential. I explained briefly that EFT was like acupuncture but without needles and that it can reduce emotional intensity of a bad memory simply by

tapping. I talked about the effects of EFT (tingling, light headed, wanting to yawn etc) and to stop me if she felt too overwhelmed. I told her to correct me if I used any words that didn't fit with her truths. I showed her the tapping points on myself and asked if it was OK for me to tap on her.

I also explained that in each session we would focus based on what GR wanted and that a number of sessions may be needed to work on all the different areas.

### **Intervention**

We then had a discussion about her issues and I asked GR which of those issues would she like me to help her with today. She felt that she would like to work on the death of her mother and her resentment and guilt of her father.

I suggested using the "Movie Technique" for the events. The movie lasted a whole day, she said, but I asked her how many "Big Emotion" scenes there were, and she said 3. These scenes lasted only a few minutes each. So I said we would concentrate on these short scenes.

At that point she was becoming emotional, and I could see she was going to cry. I guessed her SUD level was in the region of 8. So I tapped her KC point and told her to say.. "Even though I'm overwhelmed with emotion right now..... I want to remain calm." Then I tapped on the sequence (no fingers or gamut) saying "this emotional overwhelm" "I'm so overwhelmed just thinking of it" "I feel so emotional"

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

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

GR said her SUDS level was 9.

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

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

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

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

I decided to reintroduce a set up phrase as the SUD was not going down.  
"Even though mum collapsed in the street, and it gave me a fright, and I didn't know what to do, I deeply and completely love and accept myself, and I forgive



myself and anyone else that might have contributed to this, and even though I feel I should have known, and I feel responsible for her death because I didn't pay enough attention when she said she was tired, I know that I am only human and I can't know everything and she has said she was tired many times before and how was I to know the difference this time" (I probably said a whole lot more but I can't remember exactly what I said because its difficult to remember it all)

We then tapped 2 rounds on "She collapsed in the street" SUDS to Zero. Then I asked her to say a number of things so that I could check that I had got rid of all the emotional intensity. I got her to repeat the following phrases and rate how true they were:

"I feel guilty about mums death" Not true

"It was my fault she died" Not true

"I could have saved her" She said.. "Well, maybe..."

So we tapped on "I could have saved her"

I asked her to repeat it again, she said. "Perhaps I could have saved her, but I will never know" She seemed unconcerned so I left it at that. At that point I asked if she wanted to continue but she said she felt so much better and there was no tightness in her chest so we turned to her thoughts about her father.

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

I decided to tap on the whole thing. SUDS 8

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

"Even though I feel guilty that I resent my father for his behaviour, and I think I shouldn't feel like this, I accept myself, deeply and completely, and I love myself too... " I cant remember what else I put in the setup but I moved her towards the thought that her father was acting in the only way he knew how, the forgiveness of herself, and the forgiveness of her father.

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

Tapped on "Remaining guilt about dad" She said that she didn't feel at all guilty (and looked surprised!)

At that time, our hour was up and she had to go because she had to pick up her grandson. I gave her a sheet with the EFT tapping points on for her to practice on.

## **Outcome**

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

## **Future planning**

None necessary. We booked another appointment for a week's time.

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

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

### **Post session Review**

I realized I need to keep more focused as GR does tend to switch aspects quite quickly. I will remember with other clients to watch the time in future and bring the session to a close by ending with a nice positive round of tapping. I learned to be present for the client and take it step by step.