



## **UKATA Individual Membership Policy**

*Approved by UKATA Council February 2024*

### **Purpose of this document**

This document sets out the UKATA membership policy including the requirements for membership and membership renewals.

It also contains the procedures that operate in respect of members who ask to be restored to the UKATA membership register after their membership has lapsed.

The lapse may be due to, but is not limited to, failure to complete on-time renewal of membership or 5 yearly review (For members registered with United Kingdom Council for Psychotherapy).

Provides details on how to inform UKATA of any changes in personal/professional circumstances.

For information on taking time out for health reasons, please refer to the Time out Sabbatical Policy found on the website.

### **1.0 Membership**

UKATA has various categories of membership depending on the member's level of certification.

The UKATA membership year runs from 1st October to 30th September each year. It is each member's individual responsibility to renew their membership annually, to fully complete all membership renewal forms and to pay their fees on time.

Members are responsible for: -

- Updating their online personal profile ensuring that their name, address etc is kept up to date.
- Please also email the office with all new personal details so they can update mailing lists etc. [office@UKA4TA.co.uk](mailto:office@UKA4TA.co.uk)

- Ensuring that UKATA is immediately informed of changes to their membership status. i.e., achieve their Diploma or CTA or become a Contractual Trainee. This is done by completing the 'Change of Membership Status' form found on the UKATA website. Additional membership fees will be due from the date the qualification was achieved or the date of the CTA contract.

All UKATA members need to belong to the European Association for Transactional Analysis (EATA) and will be given the option to obtain EATA affiliate membership during their UKATA membership process. However, members may choose to pay their EATA fee via another EATA national affiliate organisation.

If a member fails to renew their membership of UKATA their affiliate membership of EATA will also be cancelled unless they pay their EATA fees via another national affiliate organisation. Any EATA contracts held will become invalid unless the member remains a member of EATA, via another national affiliate organisation or the International Transactional Analysis Association (ITAA).

UKATA is an organisational member for United Kingdom Council for Psychotherapy (UKCP). If UKATA members register with UKCP via UKATA and your UKATA membership lapses your UKCP membership will also lapse.

### **1.1 Students and Trainees**

It is a requirement for ALL UKATA Trainees to be a member of UKATA throughout the duration of their training.

For those seeking United Kingdom Council for Psychotherapy (UKCP) registration, this means from the beginning of their first or foundation year of training until they achieve UKCP registration and or CTA.

It is important that the correct membership category is selected depending on the progression of your journey. Either a Trainee, Diploma Holder or Contractual Trainee.

It is also important that you change your membership status to the appropriate category as soon as your situation changes, i.e., when you receive your Registered ITAA or EATA CTA contract, you need to complete the 'Change of membership status' form (found on the website). For UKATA to maintain its records and support members accordingly it is important that members do not wait to change their status until the next renewal point.

- 1.1.1 All trainees following a psychotherapeutic counselling or psychotherapy pathway and who wish to achieve UKCP registration are required to undertake personal psychotherapy congruent with the style the trainee will be practising. For detailed information on this please refer to the UKATA's policy 'Psychotherapy Trainees Personal Therapy'.

- 1.1.2 All trainees who wish, at any time, to complete the new UKCP Registration process or undertake their Certified Transactional Analyst (CTA) exam are required to have completed a minimum of four years of training within a UKATA psychotherapy Registered Training Establishment (RTE), these do not have to be continuous years.

Should a psychotherapy or psychotherapeutic counselling trainee wish to take time out from training they are required to retain their membership of UKATA if they wish to count any hours of psychotherapy or psychotherapeutic counselling practice, they may accumulate during that time to count toward any eventual UKATA qualification or UKCP registration. For information on taking time out for health reasons, please refer to the Time out Sabbatical Policy found on the website.

- 1.1.3 If a trainee should choose not to remain a member of UKATA during any such break they will not be able to count any training, supervision and clinical hours accrued during that time towards any UKATA qualification or UKCP registration, although their hours would still count towards CTA through EATA or ITAA.
- 1.1.4 As soon as a trainee, in any of the fields, has a signed and registered EATA or ITAA Training Contract they must immediately inform the UKATA Administration office, by completing the 'Change of membership status' form (found on the website). Their membership category will then be updated accordingly. Any additional fees are to be paid immediately and fees will be backdated if there is a delay in receiving the contract. Fees will be charged from the date that is stamped on the EATA or ITAA contract.
- 1.1.5 It is the responsibility of any trainee who has entered into a CTA contract through EATA to ensure that their EATA affiliate membership fee is paid. If this fee is paid via UKATA and they do not renew their UKATA membership their EATA contract will become invalid.

### **Diploma Holders**

This category of membership is for members who have either a Registered Training Establishment (RTE) Diploma (including externally validated Diplomas) or the UKATA Diploma.

If an RTE or UKATA Diploma holder continues training to attain UKCP registration or CTA exam they must remain a member of UKATA for their client and training hours to count.

On completion of an RTE or UKATA Diploma, members must update their membership category by completing the 'Change of Membership Status' form (found on the website) Additional fees will be incurred.

### **Contractual Trainee**

This membership is for all trainees who have a current EATA or ITAA CTA Contract.

Please note if membership of UKATA, and thereby EATA affiliate membership, lapses any CTA contract will become invalid unless the contract holder remains a contractual trainee member of EATA via another national organisation or is a contractual trainee member of the ITAA.

Once a registered contract is received or amended, members must update their membership category by completing the 'Change of Membership Status' form (found on the website) Additional fees will be incurred.

If amendments are made to the contract i.e. it is extended, or a supervisor is changed the amended contract must be sent to UKATA via [office@uka4ta.co.uk](mailto:office@uka4ta.co.uk)

### **Certified Transactional Analyst**

This membership category is for any member who has successfully passed the CTA written and oral examinations.

After successfully completing a CTA oral exam, members must update their membership category by completing the 'Change of Membership Status' form (found on the website) Additional fees will be incurred.

If membership of UKATA, and thereby EATA affiliate membership, lapses any CTA contracts the member may hold for other UKATA or EATA national affiliated organisation members will also become invalid unless they remain a CTA Trainer member of EATA via another national affiliated organisation or the ITAA.

UKATA is an organisational member for UKCP. If UKATA members register with UKCP via UKATA and your UKATA membership lapses your UKCP membership will also lapse.

### **Provisional Teaching and Supervising Transactional Analyst (PTSTA) and above including Certified Transactional Analyst Trainer, Supervising Transactional Analyst (STA), Teaching Transactional Analyst (TTA) and Teaching and Supervising Transactional Analyst (TSTA)**

This membership category is open to all members who are a PTSTA, CTA Trainer, STA, TTA or TSTA.

Copies of updated, renewed or amended contracts need to be sent to the UKATA Administration office this can be done by completing the 'Change of Membership Status' form (found on the website).

After successfully completing any teaching and or supervision exams, members must update their membership category by completing the 'Change of Membership Status' form (found on the website) Additional fees will be incurred.

**Please note:** if membership of UKATA, and thereby EATA, lapses the member's PTSTA contract (if applicable) and any PTSTA or CTA contracts the member may hold for other UKATA or national affiliate organisation members will also become invalid unless they remain a P/TSTA/STA/TTA member of an EATA national affiliated organisation or a P/TSTA/STA/TTA member of the ITAA.

1.1.6 For details regarding how you might advertise yourself please refer to the Advertising policy on the website.

## **1.2 Joining UKATA - Membership year is 1st October – 30th September**

To join UKATA as an individual new member an applicant will need to complete the 'Join UKATA' application form found under Membership on the UKATA website.

It is possible to join UKATA at any time during the year.

Full fees apply irrespective of when you join throughout the membership year.

Instalment payment options are available for all members until 30th November.

To join UKATA as an RTE please contact the Chair of TASC for more information.

## **1.3 Renewing Membership -Individuals**

It is each member's responsibility to renew their membership annually.

Membership renewal is now a fully online process.

All current members will be contacted via group email to inform them that their membership is due for renewal.

In order to maintain membership and any EATA contracts members are advised to renew as soon as possible, preferably within 28 days.

To assist members in spreading the cost UKATA offers a monthly instalment option to members who renew before 30th November.

Existing members will be charged a late fee of £25 if they renew after 15th December.

The final date for renewals is 31st January each year. After this point, members will have to go through a rejoining process.

**Please note:** *As part of the renewal process, you will be asked to confirm that you have completed all your relevant CPD hours and that you have records of these. CPD hours required vary depending on which training route you are taking and which organisations you belong to. It is your responsibility to know your CPD requirements.*

*UKATA periodically audits members' CPD records. It is therefore your responsibility to ensure you keep these up to date in a format that you can send to UKATA should you be selected for audit purposes.*

All members who are registered with UKCP via UKATA are required to submit a completed 5-year review on the anniversary of completing their UKCP registration. Please read the UKATA 5-year Review CPD Guidance document found on the website.

If a member completes a 5-year review via another organisation, then it may be possible for them to submit the fully completed and signed/endorsed 5-year review form provided it has the same or similar information as the UKATA 5-year review form.

Any fees sent to UKATA without all the necessary paperwork will be refunded if the sender's identity is known. If the sender's identity cannot be ascertained within 6 months, then any monies will be donated to the bursary fund. Any monies sent in this way do not constitute a renewal of membership. (An admin fee of £25 is applicable).

If a member fails to pay their membership fee in full as arranged with the UKATA Administration office, the membership is not renewed.

If a member fails to pay their membership via any agreed instalment plan, they will be contacted by the UKATA office and asked to reinstate payments. If payment is not reinstated membership will cease.

### **1.3.1 Delay in renewing membership – Up to 15th December annually.**

Membership must be renewed annually.

Occasionally members fail to:

- Renew membership on time by completing the online renewal process or payment is not made correctly.
- Complete their 5 yearly review on the anniversary of their UKCP registration.
- Failure to complete any one of the points means that the membership will not be renewed.

In cases where membership has lapsed because members have not renewed their membership or completed a 5 yearly review on time, UKATA will allow restoration to the UKATA membership register without loss of continuity of membership or further penalty where the following conditions are met:

- The member asks to be restored to the register no later than 31st January.
- The correct full membership fee has been received by UKATA
- A plan is agreed for the 5 yearly review to be completed as soon as possible. The member asks to be restored to the register no later than 31st January.

### **1.3.2 Renewal not completed by 15th December**

Late payment fee of £25 will be automatically added to the renewal costs.

### **1.3.3. Renewal not completed by 15th January**

On or near 15 th January a reminder message will be sent out to those members who have not renewed their membership outlining the consequence of failing to renew which are:

1. Remove the lapsed member's name from the Practitioner Listing, if applicable.
2. Remove the lapsed member's name from the UKATA Mailing lists for emails and the Transactional Analyst Magazine.
3. EATA will be notified that their membership is viewed by UKATA as lapsed. Please note this will mean that any contracts the member holds either for him or herself or for other UKATA or EATA national affiliated organisation members will become invalid unless they are members of EATA via another national affiliated organisation or the ITAA.
4. The lapsed member can no longer at this stage access the members' area of the UKATA website.

The member will have until 31st January to renew their membership without any further penalty (the late payment surcharge is still payable).

### **1.3.4 Renewal not completed by 31st January**

If a member has not responded to the opportunity to renew their membership by 31st January UKATA will view the membership as having lapsed and will:

1. Remove the lapsed member's name from the Practitioner Listing;
2. Remove the lapsed member's name from the UKATA Mailing lists for emails and the Transactional Analyst Magazine
3. Inform EATA that the lapsed member is no longer a member of UKATA as their membership is viewed as lapsed.

4. Please note this will mean that any contracts the lapsed member holds either for him or herself or for other UKATA or EATA national affiliate organisation members will become invalid unless they are members of EATA via another national affiliate organisation or the ITAA.
5. Cancel the lapsed member's access to the UKATA web site member's area.

#### **1.4 Request for Reinstatement of Membership between 1 February and June 30**

If a lapsed member wishes to reinstate their UKATA membership they will need to complete the 'Rejoin UKATA' application form found on the website.

If the applicant wishes to apply to backdate their membership then there is an additional £25 late payment fee as well as the membership fees. The option to pay by instalments is no longer available.

A backdating application form is available from [membership@uka4ta.co.uk](mailto:membership@uka4ta.co.uk)

Backdating is only available in exceptional circumstances.

##### **1.4.1 Membership Reinstatement procedures**

If a lapsed member of UKATA wishes to reinstate their UKATA membership, they need to complete all sections of the UKATA Re-Join form. This form needs to be signed by your primary supervisor before the form can be fully processed.

Once the fully completed and signed form has been received by the UKATA Administration office. If membership has lapsed for less than a year then it will be reviewed by the office administrator.

The form will include questions relating to the lapse period and a statement of the exceptional circumstance(s) relied upon.

There are exceptional circumstances which justify UKATA in restoring the applicant to the membership register despite the delay. Exceptional circumstances might include (but this is not intended to be exhaustive): illness, injury or other serious condition that has kept the applicant from being able to renew membership earlier. Some other serious circumstances have kept the applicant from being able to renew membership earlier.

For information on taking time out for health reasons, please refer to the Time out Sabbatical Policy found on the website.

The application may be refused for any of the following reasons:

- The applicant has not provided all the information required on the form.



- The applicant has not provided sufficient details to enable UKATA to make an informed decision.
- UKATA is satisfied, from information disclosed in the applicant's completed form (or in more details provided in response to UKATA asking the applicant for more details), that the applicant is not fit to practice.
- UKATA is satisfied, from other information that comes to their attention during this process (including information from third parties and the applicant's own conduct during the process), that the applicant has acted in such a way as to breach the UKATA Code of Ethics and the Requirements and Recommendations for Professional Practice.
- That there is an outstanding complaint that needs to be heard before the application can be dealt with.

An applicant may appeal against the decision to grant the request with loss of continuity of membership to the Appeals Panel, see below for more information.

UKATA's grant of requests will be conditional on full payment by the applicant of the amount of the current membership year fees, including late payment surcharge, plus the membership fees and £25 late payment surcharge for any backdated years being claimed.

Members are responsible for ensuring they keep their CPD records for all missing years up to date and available if they are requested for auditing purposes.

### **1.5 Re-Join Applications after more than a year's break**

If someone cancels their UKATA membership or allows their membership to lapse due to taking a break from work, ill-health, sabbatical etc. and wish to re-join UKATA they will need to complete the UKATA Re-join form.

For information on taking time out for health reasons, please refer to the Time out Sabbatical Policy found on the website.

Payment by instalments may be an option if they apply to rejoin between before 30th November.

If an applicant wishes to rejoin after 31st January the full membership fee is payable.

#### **1.5.1 Re-Join Applications procedures.**

If a previous member of UKATA wishes to re-join UKATA after a period of absence they need to complete all sections of the UKATA Re-Join form. This form needs to be signed by the applicant and by their primary supervisor.

Once the fully completed and signed form has been received by the UKATA Administration office she or he will forward it on to the Chair of the Training and Accreditation Committee (TASC).

The Chair of TASC will appoint two members of the committee to review the application. They may contact the primary supervisor for confirmation of details given by the applicant.

The TASC may refuse the request on one or more of the following grounds:

- The applicant has not provided the TASC with all the information required on the form.
- The applicant has not provided the TASC with sufficient details to enable the TASC to make an informed decision.
- The TASC is satisfied, from information disclosed in the applicant's completed form (or in more details provided to the TASC in response to the TASC asking the applicant for more details), that the applicant is not fit to practice
- The TASC is satisfied, from other information that comes to their attention during this process (including information from third parties and the applicant's own conduct during the process), that the applicant has acted in such a way as to breach the UKATA Code of Ethics and the Requirements and Recommendations for Professional Practice.
- That there is an outstanding complaint that needs to be heard before the application can be dealt with.
- The TASC's grant of requests will be conditional on payment by the applicant of the membership fees, this may be payable in instalments if the application is completed before 30th November.

### **1.5.2 Appeals**

If any member or RTE wishes to appeal against any decision made regarding membership, they need to follow this procedure:

#### **Procedure:**

- Write to UKATA outlining the reasons for your appeal within 28 days of the membership renewal being rejected or condition imposed on membership renewal. The letter should be addressed to UKATA Council Chair and TASC Chair.
- The appeal should contain any supporting evidence to support the appeal.
- UKATA will acknowledge the appeal in writing within 7 days of receipt. Revised January 2020 Ratified by Council June 2020 Revised Date 2022 10
- UKATA will investigate the appeal and respond within 28 days. The UKATA Chair in conjunction with the Chair of TASC will appoint a case manager and an investigator who will be two people not involved in the original membership
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- rejection/conditional renewal. This response may request further information or present a final decision.
- If the individual member or RTE are not satisfied, on ethical or professional practice grounds, with the outcome of the appeal process they may make a complaint to the UKATA Ethics and Professional Practice Committee. In the event of an organizational complaint this matter can be referred to UKATA's arbitration process.
- If the individual member or RTE are not satisfied, on ethical or professional practice grounds with the outcome of the appeal they may appeal to EATA.

Appeals may be made for the following reasons:

- If an individual member or RTE has been unsuccessful renewing/re-instating or rejoining their membership of UKATA.
- If an individual member or RTE has been granted a conditional membership and given requirements to fulfil within a time frame.
- If procedural errors have been identified.
- If ethical or professional practice issues have been identified.

Appeals may be rejected for the following reasons:

- The individual member or RTE, without good cause, failed to renew their membership of UKATA on time.
- The individual member or RTE failed to inform UKATA of any extenuating circumstances when they applied to renew/reinstate/rejoin their UKATA membership.