

## **UKATA Individual Membership Policy**

### **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 (CTA (P) and PTSTA(P) members), taking time out for health reasons, sabbaticals or changes in personal/professional circumstances.

### **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, Student Annual Summary and Contract for Professional Development Form, or CPD Form as necessary and to pay their fees on time. Members are also responsible for informing the UKATA Administration office of any changes in personal details e.g. change of name, address, email, membership category, professional status etc. All UKATA members are also automatically enrolled as affiliate members of the European Association for Transactional Analysis (EATA), according to UKATA's affiliation contract with EATA's contract, unless they 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 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).

#### **1.1 Students and Trainees.**

A student is someone who is in training but is yet to begin a client based practice.

A trainee is someone who is in training and has begun a client based practice – see above, for psychotherapy trainees this is usually in a placement setting. It is a requirement for ALL UKATA students and trainees to be either a Student, TA Practitioner (for existing TA Practitioner members only), Registered Training Establishment (RTE) or UKATA Diploma Holder or Contractual Trainee member 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.

**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 Trainees' Personal Therapy Policy.**

**1.1.2** All students or trainees who wish, at any time, to take the Certified Transactional Analyst (CTA) exam **and** achieve UKCP registration are required to have completed a minimum of four years of training within a UKATA psychotherapy Registered Training Establishment, these do not have to be continuous years.

**1.1.3** Should a psychotherapy or psychotherapeutic counselling student or trainee wish to take time out from training they would be required to retain their membership of UKATA if they wished to count any hours of psychotherapy or psychotherapeutic counselling practice they might accumulate during that time to count toward any eventual UKATA qualification or UKCP registration. If a student or 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** Once a trainee, in any of the fields, has a signed and endorsed EATA or ITAA Training Contract they must inform the UKATA Administration office, by sending a copy of the endorsed contract, so their membership category can 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** If any student or trainee is a contractual trainee in any field and pays their EATA fees via UKATA if their membership of UKATA lapses, they are no longer a member of an EATA affiliated organisation and therefore their contract will become invalid unless they choose to pay their EATA fees via another national affiliated organisation or are a contractual trainee member of the ITAA.

## **TA Practitioner**

This membership is no longer open for new applications. Existing TA Practitioner members are those members who have an accreditation with another professional organisation e.g. British Association for Counselling and Psychotherapy (BACP), UKCP registration as a psychotherapeutic counsellor. If a TA practitioner member does not renew their membership and wishes to re-join UKATA they will need to apply to join a different membership category.

### **RTE/UKATA Diploma Holders**

This category of membership is open to members who have either an RTE Diploma or the UKATA Diploma. If an RTE or UKATA Diploma holder continues training to attain the CTA exam and UKCP registration they need to remain a member of UKATA, see paragraph 1.1 above.

### **Contractual Trainee**

This membership is open to all trainees who have a current EATA or ITAA CTA Contract. Copies of updated, renewed or amended contracts needs to be sent to the UKATA Administration office.

Please note if membership of UKATA, and thereby EATA, 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.

### **Certified Transactional Analyst**

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

**Please note:** if membership of UKATA, and thereby EATA, 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.

### **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 needs to be sent to the UKATA Administration office.

**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**

To join UKATA as an individual new member the applicant will need to complete an application form available from the UKATA website or from the UKATA Administration office. It is possible to join UKATA at any time during the year. Full fees apply irrespective on when you join throughout the membership year. The instalment payment option is not available for first time members of UKATA. 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 individual responsibility to renew their membership annually. 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, it may possible to pay by four instalments, only available for online renewals and only up to 31<sup>st</sup> January.

Members can renew their membership online on or after 1<sup>st</sup> October each year. Membership renewals close on 31<sup>st</sup> January each year.

**Please note** that in order to complete membership renewal members must also submit either their **completed** UKATA Student Annual Summary and Contract for Professional Development Form (for all students and trainees including Contractual Trainees) or their **completed** UKATA Continuing Professional Development (CPD) form (for all RTE/UKATA Diploma Holders (unless a Contractual Trainee), TA Practitioners, PTSTA, CTA Trainer and TSTA members) as they form part of the online renewal process.

Further all qualified members are required to submit a **completed** 5-year review on the anniversary of passing their CTA examination. For ease members are to submit their 5-year review along with their membership renewal.

If the completed UKATA Student Annual Summary and Contract for Professional Development Form, UKATA CPD form or 5-year Review are not submitted the membership will not be renewed.

If a member is also a member of any other organisation, they are still required to complete the UKATA Student Annual Summary and Contract for Professional Development Form or UKATA CPD Form as necessary to renew their UKATA membership. 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.

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 (only available when renewing online) any fees already paid 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.

### **1.3.1 Delay in renewing membership – Up to 15<sup>th</sup> December annually.**

Membership must be renewed annually.

Occasionally members fail to:

- Renew membership on time by completing the member renewal form or
- Complete either the student annual summary and contract form professional development form or CPD form

or

- Complete their 5 yearly review If required

or

- Pay their membership fee.

or

- despite receiving alerts from UKATA prior to the renewal date or 5 yearly review date both of which are the 1<sup>st</sup> October. 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 5 yearly review on time, UKATA will allow restoration to the membership register without loss of continuity of membership or further penalty where the following conditions are met:

1. The member asks to be restored to the register no later than 15<sup>th</sup> Dec of the membership year.
2. The correct membership fee has been received by UKATA, or agreement has been made to pay in four instalments (available online only).
3. The member has delivered to UKATA a completed and signed membership renewal form and either a completed and signed student annual summary and contract for professional development form (for all students, trainees and contractual trainees) or CPD return (for all RTE/UKATA Diploma, CTA and above qualified members) and a completed and signed 5-year review if applicable.

No additional fee will be charged by UKATA for administering restoration to the membership register in accordance with this rule.

### **1.3.2 Renewal not completed by 15<sup>th</sup> December**

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

### **1.3.3. Renewal not completed by 15<sup>th</sup> January**

On or near 15<sup>th</sup> 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 31<sup>st</sup> January to renew their membership without any further penalty (the late payment surcharge is still payable) and may still pay their fees in four

instalments by renewing online. After the 15<sup>th</sup> January members wishing to renew will need to contact the UKATA Administration office to be given access to renew online.

### **1.3.4 Renewal not completed by 31<sup>st</sup> January**

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

5. Remove the lapsed member's name from the Practitioner Listing;
  6. Remove the lapsed member's name from the UKATA Mailing lists for emails and the Transactional Analyst Magazine
  7. Inform EATA that the lapsed member is no longer a member of UKATA as their membership is viewed as lapsed. 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.
7. 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 contact the UKATA Administration office for a Re-Join Form, there is a £20 administration charge to process re-join applications. If the applicant wishes 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.

#### **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 the applicant and by their primary supervisor.

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 manager.

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

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

1. The applicant has not provided all the information required on the form.
2. The applicant has not provided sufficient details to enable UKATA to make an informed decision
3. 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
4. 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.
5. That there is an outstanding complaint that needs to be heard before the application can be dealt with.
6. 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 has kept the applicant from being able to renew membership earlier. Some other serious circumstance has kept the applicant from being able to renew membership earlier.

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 £50 late payment surcharge for any backdated years being claimed; PLUS receipt by the UKATA Administration office of a fully completed Student Annual Summary and Contract for Professional Development Form (for all students and trainees including Contractual Trainees) OR a fully completed Continuing Professional Development (CPD) form (for all RTE/UKATA Diploma Holders (unless a Contractual Trainee), TA Practitioners, PTSTA, CTA Trainer and TSTA members) for the year just ended and for any other years for which backdated membership is being sought. And a completed and signed 5-year review, if applicable.

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

If someone cancelled their UKATA membership or allowed 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 contact the UKATA Administration for a Re-join form. There is a £20 administration charge to process re-join applications. Payment by instalments maybe an option if they apply to re-join between 1st October and 31<sup>st</sup> January, online renewal only. If an applicant wishes to re-join after 31<sup>st</sup> 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:

1. The applicant has not provided the TASC with all the information required on the form.
2. The applicant has not provided the TASC with sufficient details to enable the TASC to make an informed decision
3. 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
4. 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.
5. 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 four instalments if the application is completed before 31<sup>st</sup> January.

### **1.5.2 Appeals**

If any member or RTE wishes to appeal against any decision made regarding membership, they are to:

#### **Procedure:**

1. 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.
2. The appeal should contain any supporting evidence to support the appeal.
3. UKATA will acknowledge the appeal in writing within 7 days of receipt.

4. 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 rejection/conditional renewal. This response may request further information or present a final decision.

5. 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.

6. 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:

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

Appeals may be rejected for the following reasons:

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