

## OREGON PSYCHOANALYTIC INSTITUTE PROGRESSION COMMITTEE POLICIES AND PROCEDURES

*(Revised October 21, 2024)*

### Purpose

The Progression Committee is a committee of the Oregon Psychoanalytic Institute (OPI) Executive Committee (EC) and reports to that Committee. It reviews the progress of candidates to ensure that the appropriate standards of training are being met in accordance with the minimal standards set by the American Psychoanalytic Association and the standards agreed upon by the Oregon Psychoanalytic Institute. In addition, it acts in whatever way possible to support and enhance the educational process and experience for candidates, to identify problems in candidate progression, and to help candidates work out these problems. By regularly reviewing the training records, the Chair of the Progression Committee can ensure that required reports are submitted and can act to ensure that the training records are being appropriately maintained.

### Structure

The Chair of the Progression Committee is appointed by the Director of the OPI EC for a three-year term. A second three-year term may be served by the Chair, but the terms may not be consecutive. The Director makes the appointment at the beginning of their term. The Chair of the Progression Committee reports to the OPI EC. The Chair is also responsible for Progression Committee meetings, in that they are responsible for setting the agenda and convening the meeting, and making sure that the information for the meeting has been sent to the members of the Committee. Monthly Progression Committee meeting minutes are sent to the OPI Director and institute administrator.

### Functions

The functions of the Progression Committee include but are not limited to carrying out the policies and procedures regarding advisors, supervisors, the training analysis, and candidate reviews (including graduation, leave of absence, etc.). Meetings in which these functions will be addressed will include Progression Review meetings (also called Progression Review Committee Meetings), involving the review of the progression of individual candidates, and Progression Committee meetings, involving consideration of individual candidate progress in addition to other matters before the committee. Faculty members who are not regular members of the Progression Committee may be invited to participate in Progression Review meetings.

### Progression Committee Membership

The Chair of the Progression Committee shall be an OPI faculty analyst appointed by the Institute Director. The Chair shall appoint members to the Progression Committee from the OPI faculty. At the Chair's discretion, individuals may be invited to attend a meeting in an ex officio capacity.

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## **Progression Review Meetings**

The Progression Committee will determine who from the faculty shall be invited to attend the biannual Progression Review meetings (also known as Progression Review Committee meetings). Supervisors of the candidate reviewed are required to attend as are members of the Progression Review Committee for that meeting. Likewise, the advisor of the candidate is to attend as a non-voting member of the Progression Review Committee for that meeting. Recusal from participation in Progression Review meetings should occur under the following circumstances: the attendee is or was the training analyst or a previous analyst or psychotherapist for the candidate being reviewed; the attendee was in the same OPI class cohort as the candidate being reviewed; the attendee is or was the analyst or psychotherapist for the spouse, partner and/or family member of the candidate being reviewed; and/or the committee member has a personal relationship with the candidate being reviewed which, in the opinion of the attendee, a Progression Committee member or the Progression Committee Chair could potentially create a conflict of interest in relation to the review process. If a conflict is suspected, there will be discussion in the Progression Committee as to how to best proceed. At least two Training and Supervising Analysts shall be present at all Progression Review Meetings.

Progression Review meetings are held on a regular basis throughout the academic year. The Progression Review Committee may meet on other occasions at the discretion of the Progression Committee Chair to address matters other than candidate progression reviews. The schedule for Progression Review meetings is circulated to those who will be attending prior to the meeting. The Progression Committee Chair verbally reports the results of the Progression Review meeting to the OPI EC for graduation or other significant decisions. If a candidate objects to the decision of the OPI EC regarding the progression report, the candidate is encouraged to speak with their advisor and/or the Progression Committee Chair directly. If the matter cannot be resolved in this way, the candidate may request an appeal of the decision to the OPI EC. If the candidate is unsatisfied with the outcome of the appeal to the OPI EC, the candidate may bring the matter to the OPI Board of Directors for review as to whether the policies and procedures of the OPI EC were followed.

## **Advisors**

Advisors are considered an integral part of a candidate's analytic education. The Chair of the Admissions Committee will appoint an advisor for each candidate upon admission to OPI. A candidate may request a particular advisor. In making such an appointment the Chair of Admissions may convene a committee for assistance and consult with the Progression Committee or the OPI EC. In making the assignment, the Admission Chair's decision considers (but is not limited by) the candidate's request.

After the initial advisor assignment by the Admissions Committee, the advisor functions within the purview of the Progression Committee. Once a faculty member agrees to be an advisor, the Admissions Chair will send a copy of the advisor section of the Progression P&P's to both the candidate and advisor. The Admissions Chair will inform the Progression Committee Chair of the

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advisor/advisee assignment.

Following the initial appointment of an advisor, a candidate may decide they prefer to work with a different advisor. If this occurs, it is the candidate's responsibility to contact the Chair of the Progression Committee to discuss a reassignment. Because of the size of the faculty, a reassignment may not always be possible. If a candidate elects to work with a current advisor as an OPI supervisor, the candidate will decide on a new advisor, reach out to them to confirm they are available and willing, and communicate this to the Chair of Progression. The new advisor will confirm with the Progression Committee Chair that they are willing to take on this responsibility.

Once a faculty member agrees to be an advisor, both candidate and advisor will be sent a copy of these policies by the Chair that has appointed them, either of the Admissions or Progression Committee.

The advisor's primary role is to provide guidance around educational matters in a supportive, non-evaluative relationship that helps facilitate the candidate's education and professional development as an analyst. It should foster an atmosphere of trust and respect where matters pertaining to the candidate's education can be freely discussed. Progression issues are expected to be a regular part of the conversation. The advisor must be willing and able to function in a dual role representing both OPI and the candidate. Ideally, the advisor should be someone to whom the candidate can go for straight talk about supervisors, classes, faculty, etc. and who can facilitate the candidate's seeking further support with any training-related issue, including Progression issues. The advisor should also be able to provide guidance that is in the best interest of the candidate's analytic training and development, including at times giving advice that may be difficult for the candidate to hear.

An advisor will attend Progression Committee Reviews where the candidate is discussed. The advisor participates in the meeting as someone who can contribute a fuller picture of the candidate's development to the Progression Review Committee. It is expected that the advisor/advisee dyad discuss prior to the meeting what the advisor will bring to the Progression Review. For example, a candidate or advisor may want the Progression Review Committee to know something important about the candidate's development as an analyst that would not have been reported by supervisors or instructors. While the advisor role is not confidential, it is expected that the advisor will use discretion to only share information the advisor thinks is pertinent for the Progression Review Committee to know to consider what is in the best interest of the candidate's education and training. After the candidate receives the Progression Review letter that follows the biannual Progression Review meetings, it is expected that the candidate and advisor discuss the candidate's review as summarized in the letter.

The advisor may assume a mentor role that evolves over time as candidates move forward in their analytic development. While it is the candidate's privilege to have or to use their advisor, the advisor can do much to advance the advising relationship, including actively seeking out and developing an advisory relationship with the candidate, rather than waiting for their advisee to call them. The advisor should meet with the candidate at least twice a year, preferably more often. Making certain that channels of communication are open on a regular basis between candidate

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and advisor is part of the advisor's role.

The Progression Committee understands that the advisor role presents certain challenges to the advisor. For example, there may be times that the advisor is pulled out of their role as educational advisor and into a role of being a candidate's friend or ally that is no longer acting in the best interest of the candidate's analytic education and development. In these circumstances, the Progression Committee will be available to advisors for consultation to help the advisor carry out their advisory function. This consultation could be initiated by the advisor, the advisee/candidate, the Progression Committee, or the Progression Review Committee. In rare instances, it may become clear to the Progression Committee that an advisor is unable to function adequately in the capacity of an advisor. In this circumstance, in consultation with the OPI EC, the Progression Committee may decide that the faculty member may no longer serve as an OPI advisor.

### **Supervision**

Supervision is understood as an essential component of the education of candidates, as well as a crucial source of support for candidates in their efforts to develop as psychoanalytic clinicians and thinkers. Upon matriculation, the candidate selects a supervisor. The Chair of the Progression Committee and other faculty including the candidate's advisor are available for consultation in this process. The candidate should notify the Progression Committee Chair of their selection. Occasionally, a supervisor is not available, and another choice must be made. The first two supervisors must be OPI supervising analysts. For subsequent cases, candidates may obtain supervision from a non-OPI supervisor who is a Training and Supervising Analyst from an APsA affiliated Institute. This requires the prospective supervisor to make a request to the Chair of the OPI TA/SA Committee to be granted Geographic Rule Supervising Analyst status. Each control case required for graduation must be supervised by a different supervising analyst.

Fees for supervision are left to the supervisee and supervisor to determine.

Supervision on all approved cases is once a week. However, when the case is well advanced and the candidate's progression satisfactory, the candidate/supervisor dyad may request a reduction in the frequency of supervision to every other week. A written request should be sent by the candidate to the Chair of the Progression Committee. This request is placed in the candidate's file to be discussed at the next Progression Review Committee meeting. Any such change in frequency would need to be approved first by the Progression Review Committee.

Occasionally, a supervisee may wish to change to a different supervisor. If the candidate wishes to change supervisors, this should be discussed between the candidate and supervisor. The advisor may be of help as well.

It is expected that candidates will not conduct clinical psychoanalysis without supervision.

### **The Training Analysis**

If, upon admission, the pre-matriculation candidate is not in their four to five times per week training analysis with an OPI training analyst, they should begin the analysis as soon as possible.

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The Training Analysis must be in person; certain exceptions to the in-person requirement for a portion of the analysis may be considered for candidates living outside the greater Portland metro area in Oregon and SW Washington. We strongly recommend that a candidate be in their training analysis at least six months prior to beginning their first year of classes. If this is not possible, a candidate must be in their four-five times/week training analysis for at least six months before beginning their first control case. The candidate selects their training analyst from among the available OPI TA's. It is beneficial to the candidate to begin the training analysis as much in advance of training as possible as it is a requirement that the training analysis overlap for a significant period of time (three years at a minimum) with the candidate's analysis of control cases. Were this analysis to terminate before supervised control cases begin, the candidate must return to analysis with an OPI training analyst so that the overlap with supervised control cases may occur.

Special instances that require a waiver of these policies are to be taken up with the Progression Review Committee, which will forward its determination to the OPI EC for review.

OPI is a non-reporting institute. However, it is the responsibility of both the candidate and the TA to notify the institute's administrator of the date of the beginning and ending of their training analysis while still a candidate. The training analysis becomes a personal analysis upon graduation.

Analytic fees are privately negotiated.

If a candidate changes training analyst during candidacy the institute administrator must be notified. **This is an important matter. We recommend the candidate seek consultation in this process.**

### Progression Review Procedures

Each candidate is reviewed biannually. The Progression Review Committee (made up of those at the Progression Review for the particular candidate) considers the following factors in reaching its recommendations: the OPI training record including supervisory reports, classroom evaluations, discussions with others on the faculty about activities and progress as a candidate and direct input from candidates. Candidates may convey any pertinent information, including their view of their progress either by writing a letter to the Chair, by asking their advisor to speak on their behalf, or by speaking in person to the Progression Review Committee.

Any faculty or candidate may initiate additional reviews. Likewise, the Progression Committee may recommend reviews at a greater frequency. The Progression Committee may inform the OPI EC as to whether an additional review is recommended.

### Progression Review Committee Documentation and Reporting Practices

The Progression Review Committee conducts regular reviews of candidate performance utilizing the results of classroom evaluations, supervisors' reports, and other training records. The candidate's advisor is present during the Progression Review of their advisee. During the

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Progression Review meeting an OPI faculty member presents salient points from the candidate's training record to the Committee and then writes a "summary" of the outcome of the Review. A letter summarizing the Progression Review meeting discussion is drafted by the Progression Committee, sent to the candidate and advisor, and placed in the candidate's official record. The Chair of the Progression Committee also verbally reports noteworthy results of the Progression Review meeting (such as graduation recommendations, leaves of absence or significant concerns about a candidate) to the OPI EC. The advisor then arranges a meeting with the candidate to informally discuss the outcome of the Progression Review.

The Progression Committee is seeking to improve communication with the candidate and ensure that useful specifics identified in the Review are conveyed in a direct and helpful manner. The Committee believes it is important to have a clear, "official" procedure for recording and communicating the results of the Review promptly and efficiently.

- An OPI faculty member presents a synopsis of the candidate's training record at the Progression Review meeting.
- After discussion by those participating in the Review, this presenter writes a draft summary of the findings and recommendations.
- The draft summary is circulated (via email) to all Progression Committee members for editing and revisions, and a final summary is conveyed to the Chair.
- The Progression Committee Chair uses the final summary to write a letter from the Progression Committee that, after being circulated to the Committee for editing and revisions, is sent to the candidate with a copy to the advisor. The Progression Committee's letter, but not the summary, is placed in the candidate's official record.
- A short time after this meeting, the candidate and their advisor are expected to meet to-discuss concerns, questions, or any other issues that the candidate may wish to raise.

### **Seminar Work**

A candidate is expected to attend all seminars that are required. Attendance of less than 80% of a seminar will result in a candidate not receiving credit toward graduation for that seminar (please see OPI Curriculum Committee P&P's for more details on attendance requirements). It is the candidate's responsibility to arrange to make up that seminar. Each instructor is required to assess and submit an evaluation of each candidate's seminar participation. These reports become part of the Progression Review Committee's evaluation of a candidate and are part of the candidate's permanent record.

### **Advanced Status**

Candidates who have completed the four-year didactic curriculum are considered Advanced Candidates. Advanced candidates are required to attend continuous case conference seminars until graduation.

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## **Supervised Analyses of Control Cases**

All supervised analyses are to be conducted at no less than four times/week, with the exception that a three times/week case can be applied towards the graduation requirement of 1200 total hours of supervised analyses. See further details under "Supervised three times per week Immersion Cases."

Note that a "control case" is a supervised analysis conducted at four-five times per week with the supervisor's approval. A supervised analytic treatment conducted three times per week is referred to as an "immersion case".

The selection of all control cases is based on the patient's suitability for psychoanalytic treatment, the appropriateness for the patient to see a candidate in training, and the suitability of the patient as a training case for the candidate, including consideration of the candidate's level of experience.

Candidates are encouraged to become immersed in analytic work to gain more experience. The first control case is selected in consultation with the candidate's first supervisor.

A supervised analytic case becomes a matter of record as an official control case if the evaluation of analyzability and suitability as a training case by the candidate and supervisor leads to the decision to undertake analysis. This is true even if the case fails shortly thereafter. The experience and performance of the candidate in assessing analyzability and attempting to engage the analysis is relevant in the assessment of training and development as an analyst. The case must be discussed with and approved by the specific supervisor who will be supervising the case before the case becomes an official control case.

A candidate is required to write initial, annual, and final case reports (also called "case write-ups"). These reports are shared with the supervisor who may approve or request further work on the report before its acceptance. The details of the case reports will be found in the Case Reports section of this document.

A Progression Review of first year candidates occurs two or three months after the beginning of classes. Unless there are special considerations, permission to start a first case is given at that time. Please note that the candidate must be in their training analysis for six months prior to beginning their first control case. A second control case may be started when the first case is solidly begun, and the supervisor approves the candidate's readiness to undertake a second control case. The candidate chooses a second supervisor to discuss the evaluation of a possible second control case. Acceptability of the case is contingent on the approval of the second supervisor. All subsequent control cases will need to be approved by the supervisor who will be working with the candidate and the case.

## **Unsupervised Candidate Work**

There will be no unsupervised cases. Supervision on the required three control cases must

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continue until graduation, or termination, whichever comes first. The candidate must have different supervisors for each of the required control cases.

### **Supervised Three Times per Week Immersion Cases**

In addition to the above control cases at four to five times per week, there are three ways that three times per week supervised analytic cases (“immersion cases”) may be counted towards the minimum immersion requirement of 1200 hours:

- 1) A case is conducted three times per week under supervision by a TA/SA prior to moving to four or five times per week, at which time it can become a control case;
- 2) A TA/SA supervised case is initiated and continued at a frequency of three times per week; and
- 3) a four to five times per week control case decreases to three times per week, at which time the case would be considered an immersion case.

The three times weekly case would not be counted as one of the three control cases with specific duration requirements as outlined above; and it will not be considered a control case but will count for the requirement of minimum hours. The Immersion hours case is considered part of the educational progress of the candidate and must be supervised weekly by an OPI TA/SA who is not supervising another of the candidate’s control or immersion cases, and who will submit a report and participate in the Progression Review process.

The writing requirements for an immersion case are a two-page initial, annual, and final report.

### **Informed Consent**

Candidates are expected to obtain informed consent from all new patients in psychoanalysis during their candidacy. Compliance with the policy must be documented with the Progression Committee.

Consent may be obtained in either of the two following ways:

1. The candidate informs the patient that they are a student in psychoanalytic training and are conducting the patient’s psychoanalytic treatment in the context of studying to become a psychoanalyst at the Oregon Psychoanalytic Institute.
2. The candidate obtains a signed statement from the patient confirming that they have been informed that the treatment is occurring in the context of being a student in psychoanalytic training at the Oregon Psychoanalytic Institute.

After obtaining consent, candidates will note on the Record of Supervised Analysis whether a verbal or written consent was obtained and when.

### **Case Reports (Write-ups)**



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Psychoanalytic writing is considered an important part of the educational program. It provides a unique opportunity for the candidate to become aware of their own thinking and way of working and facilitating an expansion and deepening of their capacity to approach clinical material psychoanalytically.

Initial, annual, and final clinical case reports are required from the candidate. (An outline for each of these reports is on file with the institute administrator).

The first draft of the initial report is due to the supervisor within three months of the start date of each new control case. It should emphasize psychoanalytic diagnosis, assessment of analyzability, projected dynamics, transference, countertransference, expected resistance in the analysis, and the evolution of the opening phase.

The first draft of the annual report is due to the supervisor each year on the anniversary of the official start date of the control case. It should convey the course and process of the analysis for the year that is being discussed.

The first draft of the final report (if the candidate wishes for the case to count toward graduation) is due to the supervisor within three months of termination or interruption of the control case or, if the candidate has requested graduation and the control case is ongoing, the first draft of the final report is due to the supervisor by the deadlines specified in the OPI Graduation Checklist for Quantitative Criteria.

For the final report, a complete case summary of no more than twenty double-spaced pages is required for each control case. The final three case reports should follow the guidelines recommended by the American Board of Psychoanalysis (ABP) for certification and summarize the entire analysis.

Over the next month following submission of any first draft, the supervisor will suggest revisions, and multiple drafts may be needed. The final draft approved by the supervisor of any report will need to be completed within one month of the first draft. This includes all revisions. If a candidate has elected to have additional supervised cases during training, briefer (no more than two pages) summaries are required. If the candidate is applying for graduation, please refer to the OPI Graduation Checklist for Quantitative Criteria for deadlines.

Following the approval of the supervisor, a copy of the cover sheet for each case report should be signed and dated by the candidate and supervisor and the cover sheet (but not the report) submitted to the institute administrator for the candidate's file in accordance with the deadlines.

Case reports must be up to date to progress to the next seminar year, or to graduate.

Supervisors will notify their candidates in supervision who have not submitted their case reports. Supervisors are expected to follow up with these candidates and urge them to submit the reports. Status of write-ups should be included in the supervisory reports for the Progression Review Committee Meetings.

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Note that all case reports are confidential and must be treated as such.

### Use of Telephone or Video Teleconferencing for a Control Case

*NOTE: During emergency circumstances such as a pandemic, all aspects of analytic work may be conducted by remote technology as agreed upon with the case supervisor. This includes starting new cases as approved by an OPI supervisor or Geographical Rule Supervising Analyst approved by the OPI TA/SA Committee. Under such emergency circumstances, remote technology may be used until the analyst and analysand are comfortable resuming to in-person work.*

All analyses of control cases must be conducted in person.

Rarely under specific circumstances there may be an exception where one control case may be conducted via telephone or video teleconferencing that is HIPAA compliant with the approval of the supervisor. Currently, a control case conducted via electronic transmission will count for graduation from OPI but will not be counted for the purposes of the ABP certification process. There should first be a significant period of live, in-person analytic work that precedes the telephone or video teleconferencing contact and agreement that the patient is well engaged in the treatment. For a first case, a minimum of one year of in-person work must have occurred before such a shift may be considered. Also, for any case conducted via telephone or video teleconferencing, provision should be made, wherever possible, for in-person contact to occur periodically between candidate and analysand during the course of that work.

Approval for conducting a control case by telephone or video teleconferencing includes several steps. First, the candidate will discuss this with the supervisor and the supervisory dyad will determine on a case-by-case basis whether an analytic process has been established and analytic change has occurred. It is essential in each case to discuss every aspect from an analytic point of view, fully documented with analytic understanding in both the candidate's case write-up and the supervisor's written assessment of the analytic work. If the case meets these criteria, then the requesting candidate will complete an OPI Video Teleconferencing and Phone Checklist as well as submit any requested documentation to the Progression Committee and institute administrator to verify licensure in both states, malpractice insurance covering interstate treatment, and that measures have been taken to insure confidentiality/security.

### Procedures for SA Reports on Candidate Supervisees

Semi-annual reports on the supervision of control cases are due before each fall and spring Progression Review Meeting. The supervisor will be notified by the institute administrator before a candidate's progression review; the report is due in the institute administrator's office one month prior to the date of the Progression Review (along with the OPI Record of Supervisory Hours). A copy of every supervisory report will be given to and discussed with the supervisee and supervisor. Supervisory reports must be full and complete.

The following section is a suggested guide for supervisory reports on control cases.

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- **The initial report on the candidate would include the following:**

A paragraph would briefly state the patient's history and current problems. Some comments on how this patient was referred for analysis might be relevant here as well.

A paragraph concerning the candidate's initial ability to understand the case and deal with transference and resistance – in addition, a brief description of the beginning steps of the analysis.

Another paragraph would include discussion of the candidate's ability to present in supervision, including comments on the candidate's style of relating to the supervisor and supervision. The candidate's initial ability to learn could also receive comment.

- **Subsequent supervision reports on the candidate should include the following:**

A paragraph on how the candidate is developing in their competencies as an analyst-in-training. This could also include how the analysis being supervised has proceeded in the year since the last report, brief mention of major external events for the patient, and significant events in the analysis itself, as these are relevant to describing the candidate's development. However, the primary focus should be on how the candidate has conducted the analysis and how the development of the candidate's competency to practice psychoanalysis compares to previous reports.

A paragraph on how the supervision has proceeded in the year since the last report: this would include brief references to attendance and the candidate's presentation style. It would also include the candidate's ability to use the supervision in terms of overall understanding of analytic theory and technique and in terms of the specific analytic treatment being supervised.

Reference should be made to the candidate's written case reports; have they been done and discussed in supervision and with what results. Each supervising analyst must pay scrupulous attention to the requirements of a write-up and make that write-up an **important** part of the learning process.

Supervisors will be notified of their candidates in supervision who have not submitted case reports to the institute administrator for their files. Supervisors are expected to follow up with these candidates and urge them to submit the reports.

### **Case Records and Reports/Records Retention**

A case rejected as unsuited for analysis or as a training case is not to be listed among the control cases. The supervisor may or may not choose to report on the candidate's work on a rejected case; such a report would be entered as usual in the candidate's cumulative training log.

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Upon completion of assessment of analyzability and a decision and approval by the supervisor who will be supervising the case for the candidate to undertake analysis of a control case, the candidate must fill out the identifying information on a Candidate Record of Supervised Analysis form (available on the OPI website) and submit it to the institute administrator. This is essential because it activates the monthly tabulation of hours of control analyses and supervision which must be maintained. This form identifies the supervisor, indicates the start date of analysis (and subsequent end date), frequency, gender, age, and diagnosis of the analysand. This form will be updated by the candidate prior to each Progression Review Committee meeting, as requested by the institute administrator.

A copy of the cover sheet for each case report should be signed and dated by the candidate and supervisor after the supervisor's approval of the case report and the cover sheet (but not the case report) must be submitted to the institute administrator for the candidate's file in accordance with the deadlines. Note that all case reports are confidential and must be treated as such.

**Candidates must complete the following by the following deadlines:**

- **Candidate Information Update Form:** Due to OPI Administrator **two months** before the Progression Review date.
- **OPI Candidate's Record of Supervised Analysis:** to be submitted as soon as possible after a control or immersion case is approved as such by the candidate's Supervising Analyst, and **no later than one month** prior to the Progression Review date.
- **OPI Chart of Hours:** Due to OPI Administrator **one month** before the Progression Review date.
- **Signed Cover Sheets for Case Reports:** See the Case Reports (Write-ups) section for due dates to supervisors for initial, annual and final case reports for candidates not requesting graduation. In addition, if an approved case report is to be included in the Progression Review, the signed cover sheet (but not the report) must be turned in to the OPI Administrator **at least one month** prior to that Progression Review.
- **Signed Cover Sheets for Graduation Applicants:** Candidates applying for graduation must submit signed cover sheets for Final Reports (but not the report itself) **by the deadlines specified in the Graduation Checklist for Quantitative Criteria.**
- **Candidate Review Meeting with OPI Administrator:** Must be completed **at least one week** prior to the Progression Review date and after all materials have been submitted.

**Supervising Analysts must complete and submit the following to the OPI administrator in accordance with the following deadlines:**

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- **OPI Record of Supervisory Hours:** Due to OPI Administrator **one month** prior to the Progression Review date.
- **Supervisory Reports on candidates:** Due to OPI Administrator **one month** prior to the Progression Review date.

These guidelines ensure that all necessary paperwork and requirements are met promptly to facilitate the progression and graduation processes for candidates within the program. Adhering to these deadlines is crucial to avoid delays or complications in the Review and graduation procedures.

The training records of a candidate may be reviewed by the candidate. This review will take place with the candidate's advisor or an OPI training analyst so that the record may be interpreted more fully.

When a candidate has been accepted and while in training, application materials (autobiography, admission interview reports) are kept separate from training records, in a separate, locked file cabinet, thus protecting their privacy. Upon graduation, the institute Administrator will destroy candidate files, retaining only a face sheet for each candidate ("Summary of Candidate Training Progress") which contains all the information thought to be necessary for future reference.

### **Procedures For TA Reporting**

The Training Analyst should report in writing to the institute administrator the date the training analysis began and ended. The training analysis becomes a personal matter when the candidate has graduated, and no reporting is necessary. The training analysis must be in person except in extreme circumstances.

### **Leave of Absence**

Under certain circumstances a candidate may decide that it is necessary to go on a leave of absence from active status. A leave of absence may be approved by the Progression Committee following a request by a candidate. The candidate should submit a letter to the Progression Committee describing the reasons that they believe a leave of absence is necessary. The Progression Committee will then consider the request, and specify conditions, such as the provision of supporting documents under which the leave of absence would be approved. In general, because of the advantages of continuity for psychoanalytic education, it would be desirable for leave of absence status not to extend beyond two years. A leave may apply to academic work only or be a full leave from both clinical and academic work. Conditions which the Committee may set for a leave of absence may include, but are not limited to length of time, fees to the institute, conditions regarding credit for supervised analytic work during a time-limited academic leave, and issues concerning the training analysis.

The Progression Committee will hold periodic reviews during the leave of absence and will

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review the candidate's request to be reinstated. At its discretion, the Progression Committee may require multiple interviews to determine a candidate's suitability to return. More extended leave may require more extensive evaluation of suitability for return from leave. Candidates going on leave from both clinical and academic work should consult with supervisors, and, if necessary, with the Committee about appropriate clinical management of current analytic cases. When supervised analytic work is continued during a full leave of absence, this work will not count toward the graduation requirements for supervised analytic work. The candidate on leave is expected to stay connected with their advisor on a regular basis, but not less than every six months. This facilitates the faculty's ability to assist the candidate during the leave of absence and to help prepare for eventual return to class and/or clinical work.

When a candidate is on a full leave of absence and continues clinical work with patients initiated while a candidate, that clinical work and any related supervision will not be under the auspices of Oregon Psychoanalytic Institute or Oregon Psychoanalytic Center. The full leave of absence candidate will sign a form acknowledging this change and inform the patient. The form can be developed when needed/appropriate.

### **Transfer from OPI Fulltime Clinical Psychoanalytic Candidate Program to OPI Academic Candidate Program**

A candidate participating as a clinical candidate in the full OPI psychoanalytic training program who wishes to transfer to the academic candidate status will initiate the process by submitting a written request for such change to the Chair of the OPI Progression Committee.

The Progression Committee Chair will bring this request to the Progression Review Committee for discussion and a decision.

The Progression Review Committee recommendation will be based on the candidate's classroom participation, the candidate's reasons that a change in status would better suit their goals, supervisory reports, fulfillment of administrative requirements (written reports, payment of fees, etc.), and involvement in an analytic treatment with a graduate analyst.

If approved for a transfer to become an academic candidate, the candidate will agree to complete all requirements for graduation as specified for the Academic Candidate Training Program. In addition, the academic candidate will continue working with the supervisor(s) to plan and facilitate a suitable ending of any existing control case psychoanalyses through a termination, a transfer, or a conversion into a psychoanalytic psychotherapy. The academic candidate will sign an agreement stating they will not practice psychoanalysis.

### **Graduation**

The overarching criteria for graduation as assessed by the Progression Review Committee are that the candidate: 1) demonstrates a mature and independent capacity to facilitate a deepening psychoanalytic process; and 2) demonstrates a comprehensive knowledge and understanding of the psychoanalytic process and situation, and the clinical methods and technique used in the

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practice of psychoanalysis.

Specific additional requirements are as follows:

All required coursework must be completed satisfactorily.

There are minimum immersion requirements. These include: 1) A minimum total of 1200 hours of documented supervised analytic work; and 2) Three control cases at four to five times per week with the following requirements: of these, two should be at least two years in duration; the third should be at least one year in duration. At least one case should be in a solid middle phase, compatible with a potential transition into a termination phase; the other cases should show evidence of a deepening analytic process.

We require control cases to be of more than one gender and encourage the three control cases to include diversity across the spectrum of culture, gender, sexuality, race, ethnicity, age, and other diversities. The Progression Review Committee may recommend and/or require additional cases based on the learning needs of an individual candidate.

In addition to the above control cases at four-five times per week, a supervised three times per week immersion case may be counted toward the minimum immersion requirement of 1200 hours. The three times per week case immersion case would not be counted as one of the three control cases with specific duration requirements as outlined above.

All immersion requirements must be fulfilled while the candidate is in an active status within the institute, not on a leave of absence or in any status other than a fully active one unless the Progression Committee has approved an alternative arrangement during a partial Leave of Absence. One of the three control cases may be a child supervised by an OPI approved child supervising analyst. All case write-ups must be completed before the Progression Review (specific due dates for these case write-ups are in the OPI Graduation Checklist for Quantitative Criteria, and with the institute administrator, see below), at which point the graduation request will be discussed. It is strongly recommended that candidates who have graduated prior to the termination of a case return to supervision after graduation during the termination phase of an institute case.

The three final control case write-ups should conform to the guidelines required by the American Board of Psychoanalysis (ABP) for certification and summarize the entire analysis. All fees must be paid before graduation can occur. These are the minimum requirements for graduation.

It is a requirement that the training analysis overlaps for a significant period of time (at minimum, three years) with the candidate's analysis of control cases.

Graduation may be considered after the candidate has satisfactorily completed the requirements as outlined above. To initiate consideration for graduation, the candidate must make that request in writing to the Progression Committee Chair who will bring the request to the next Progression Review Committee meeting, either in the fall or spring. If the candidate is approved for

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graduation, the official date of graduation will be the last day of classes in the term that graduation has been requested and approved by both the Progression Review Committee and the EC. We expect the candidate to complete all classes of their final term, including the case conference.

As stated above, the overarching requirements are that the candidate demonstrates a mature and independent capacity to facilitate a deepening psychoanalytic process and has a comprehensive knowledge and understanding of the psychoanalytic process and situation, and the clinical methods and technique used in the practice of psychoanalysis. This may require more supervised psychoanalytic work than the minimum requirements for immersion.

### Outline Of Graduation Requirements (please see the Graduation Checklist for Quantitative Criteria and Deadlines on the website)

**Note: The overarching criteria for graduation as assessed by the Progression Committee are that the candidate:**

- 1) Demonstrates a mature and independent capacity to facilitate a deepening psychoanalytic process.
- 2) Demonstrates a comprehensive knowledge and understanding of the psychoanalytic process and situation, and the clinical methods and technique used in the practice of psychoanalysis.

**In addition, a candidate must meet the following minimum quantitative requirements in order to apply for graduation:**

- 1) CANDIDATE REQUEST:  
The candidate has made a request for consideration of graduation in writing to the Progression Committee.
- 2) COURSEWORK  
All required coursework is completed satisfactorily, including course evaluations and make-up work for missed classes.
- 3) MINIMUM OF THREE CONTROL CASES

Minimum Immersion requirement: A minimum of three control cases, each approved by the supervising analyst for that case, have been conducted at a frequency of four-five times per week.

- a. We require control cases to be of more than one gender and encourage the control cases to include diversity across the spectrum of culture, gender, sexuality, race, ethnicity, age, and other diversities. The Progression Review Committee may recommend and/or require additional cases based on the learning needs of an individual candidate.



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- b. Two should be of at least two years in duration; the third should be at least one year in duration.
- c. One analysis is in at least a solid middle phase, compatible with the potential transition into a termination phase. The other two should show evidence of a deepening psychoanalytic process.
- d. Child option: One of the three control cases may be a child supervised by an OPI-approved child supervising analyst.

Telephone/Video option: In certain circumstances, one control case, with supervisor approval, may be conducted via telephone or video teleconferencing that is HIPAA compliant (see Use of Telephone or Videoconferencing, etc. section).

*[Note that under emergency circumstances such as a pandemic all aspects of analytic work may be conducted by remote technology as agreed to with the case supervisor.]*

### 4) REPORTS/WRITE-UPS (See Case Reports/Write-ups Section and Graduation Checklist for Quantitative Criteria for deadlines).

All case write-ups have been completed with the supervisor signing off in accordance with the deadlines listed on the "Case Reports (Write-ups)" section of these P&P's and the OPI Graduation Checklist for Quantitative Criteria.

The final three case write-ups should follow the guidelines recommended by the American Board of Psychoanalysis (ABP) for certification and summarize the entire analysis. (Appendix C, Pg. 24-26)

<https://www.abpsa.org/resources/Documents/Examination%20Materials/Handbook%20for%20Applicants.pdf>

### 5) IMMERSION HOURS

Immersion requirement: A minimum total of 1200 hours of supervised analytic work has been documented. This requirement may be met through hours with both supervised control cases and supervised immersion cases. Please see "Supervised Three times per Week Immersion Cases" section of these P&P's for details on immersion cases.

### 6) ACTIVE STATUS

All Immersion requirements have been fulfilled while the candidate is on active status within the institute, not on a leave of absence unless the Progression Committee has approved an alternative arrangement during a partial Leave of Absence.

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### 7) OVERLAP WITH TRAINING ANALYSIS

The training analysis has overlapped for a significant period of time (at a minimum, three years) with the candidate's analysis of control cases.

### 8) FEES PAID

All tuition and fees have been paid in full.

Note that in order to meet the overarching criteria for graduation, more supervised psychoanalytic work than these minimum requirements may be required.